BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA

Application of Pacific Gas and Electric Company for Approval of Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets for 2021-2026 Program Years (U39M).	Application 19-11-003
And Related Matters.	Application 19-11-004 Application 19-11-005 Application 19-11-006 Application 19-11-007

ANNUAL REPORT ACTIVITY OF SOUTHERN CALIFORNIA EDISON COMPANY (U 338-E) ON ENERGY SAVINGS ASSISTANCE, CALIFORNIA ALTERNATE RATES FOR ENERGY, AND FAMILY ELECTRIC RATE ASSISTANCE PROGRAMS FOR 2022

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This report presents the 2022 program year results and expenditures for the Southern California Edison Company's (SCE) Energy Savings Assistance (ESA), California Alternate Rates for Energy (CARE), and Family Electric Rate Assistance (FERA) programs. 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 the necessary information to analyze these low-income programs.

Respectfully submitted,

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Program Year 2022

Southern California Edison Low Income Annual Report

May 1, 2023

SOUTHERN CALIFORNIA EDISON®

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ANNUAL REPORT ACTIVITY ON ENERGY SAVINGS ASSISTANCE (ESA), CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE), AND FAMILY ELECTRIC RATE ASSISTANCE (FERA) PROGRAMS

2022 RESULTS

ESA, CARE, AND FERA PROGRAMS 2022 ANNUAL REPORT ACTIVITIES

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The Energy Savings Assistance Program

Program Year (PY) 2022 was a year in transition for the Energy Savings Assistance (ESA) program. This year represented the last year before a major shift would take place away from a "household treatment goal model," which prioritized the volume of houses served, to a "deeper energy savings model," which prioritizes both customers with higher energy usage and certain hard-to-reach customer segments.[1] Throughout 2022, Southern California Edison Company's (SCE) focus was on ramping down current program activities, assisting ESA contractors through the program transition, conducting various solicitations for new programs and pilots, and onboarding new contractors to prepare for 2023.

Budget

Prior to the start of 2022, SCE provided ESA contractors a forecast of the work and budget allocations aimed at preparing the resources needed for the PY. In an effort to supplement contractors' 2022 budgets, SCE filed an Advice Letter with the California Public Utilities Commission (CPUC) to request a shift in unspent and uncommitted 2021 Multifamily Common Area Measure program (MF CAM) Funds to the ESA Main 2022 Budget. On February 24, 2022, the CPUC approved SCE's request to reallocate unspent MF CAM funds.[2] Following the Advice Letter approval, SCE provided an updated budget allocation to ESA contractors. Per the parameters of the Advice Letter, the additional funds were intended to complete pending installations (including the procurement of measures) for those already enrolled in the program to complete the ESA work under the old model and assist in SCE's ramp-down process.

Solicitations

For the ESA program solicitations, SCE remained committed to conducting a fair and transparent competitive solicitation process. SCE targeted diverse bidderswith the ability to provide services to low income, hard-to-reach, and vulnerable customers. To facilitate transparency and address initial feedback received from the contractor community, the Investor-Owned Utilities (IOUs) coordinated and adjusted Request for Proposal (RFP) schedules where feasible to stagger the release of various solicitations and to allow potential bidders to plan resources accordingly. The IOUs developed a calendar reflecting each IOU's solicitations schedule with dates of key phases and milestones. The calendar is currently posted on each IOU's ESA solicitation website as well as the California Energy Efficiency Coordinating Committee (CAEECC) website and continues to be updated monthly on these websites.[3]

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1 Decision (D.) 21-06-015 approved the new ESA design and shift to deeper energy savings.

2 *See* Advice No. 4702-E-A.

3 Energy Savings Assistance Program Solicitations (sce.com) and Income-Qualified EE (A.19-11-003 et al.) | caeecc.

To further improve communication, SCE modified the Bidder's Conference engagement strategy by clearly defining the solicitation timeline, steps, and process for each solicitation. SCE provided early notification, information, and training/workshop opportunities to the prospective bidder community to prepare for the various RFPs launched in 2022. SCE was able to successfully complete eight (8) solicitations and award contracts by the end of 2022.

Marketing & Outreach

SCE's outreach and enrollment activities were drastically adjusted in 2022 due to budget constraints, which required SCE to balance the need to prevent overspending with the requirement of meeting its energy savings goals and implementing its ramp-down strategy. Throughout various times of the year, SCE had to halt direct marketing and suspend contractor outreach to ensure there was sufficient budget for enrollment and installation activities. Customer projects prioritized installation of measures based on energy savings, and to further transition the ESA program to the new model, SCE stopped taking new enrollments and moved to service its waitlist of interested customers. SCE communicated openly with contractors about these changes to its operations and budgets, including the revised goal of measuring success by increasing energy savings for high-use customers instead of by the gross number of homes treated.

California Alternate Rates for Energy and Family Electric Rate Assistance Programs

In PY 2022, customers enrolled in SCE's California Alternate Rates for Energy (CARE) and Family Electric Rate Assistance (FERA) programs benefitted from the continued maturation of SCE's new SAP-based customer service system launched in mid-2021, which allowed SCE to diligently analyze CARE and FERA customers' program journey to identify and remedy any operational problems or issues. SCE's first and primary analysis focused on ensuring that all eligible customers were properly enrolled in the appropriate program and received the entirety of any discount they were entitled to. This was followed by the implementation of new reconciliation and reporting processes to help mitigate enrollment and billing issues. SCE continues to monitor system and reporting processes to further refine and enhance a customer's journey throughout the program.

ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL REPORT

1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY

Summary of 2022 Results

The Energy Savings Assistance (ESA) program serves SCE's low-income customers within its 50,000 square-mile service territory. The program's objective is to help income-qualified customers reduce their energy consumption at no cost to them, while increasing their health, comfort, and safety. It is estimated that 1.3 million SCE customers qualify for the program in SCE's territory. For more than 20 years, eligible customers have received energy efficient appliances such as refrigerators and air conditioners, and services such as energy education, to help their households save energy and money.

All income-qualified residential customers living in all building types, including single-family homes, multifamily units, and mobile homes, can qualify for participation in the ESA program. Customers are also eligible and may enroll in the program whether they are homeowners or renters. Qualification requires that customers have an active account with SCE, reside in SCE's service territory, and meet the annual income guidelines established by the CPUC. Once customers demonstrate program eligibility, third-party contractors inspect participants' homes and install specific measures according to criteria observed in each home regarding appliance energy demands and feasibility of installation.

This report provides information on SCE's ESA program accomplishments and expenditures for PY 2022, during which the ESA program treated approximately 35,652 income-qualified customers, which represents 132% of the annual homes treated target and 100% of its unspent and uncommitted authorized budget. In addition, the ESA program saved approximately 19.5 GWh, exceeding the annual energy savings goal for 2022. These savings were achieved by providing a mix of measures and services, including energy education, energy-efficient appliances, and home weatherization to single-family, mobile home, multifamily units, and common area properties.

Procedural Background

The 2022 ESA program continued to operate in accordance with the direction provided by Decision (D.) 21-06-015, which adopted budgets and program directives for the IOUs regarding their administration of and participation in the ESA program for the years 2021 through 2026. PY 2022 focused on building a path toward shifting the ESA program's focus from a program aimed at treating every willing and eligible customer to a program that targets deeper energy savings for high-use customers. During this transitional period, SCE continued its current program model to ensure that enrolled customers had access to the same level of services—while at the same, SCE worked extensively to upgrade systems, forms, and reporting templates (in cooperation with the other IOUs) on implementation planning for the new ESA program direction.

Throughout 2022, SCE managed its ESA solicitations as described in its ESA Solicitation Plan for the years 2021-2026.[4] On January 7, 2022, the IOUs received a letter from the CPUC's Energy Division (ED), which provided additional guidance on the ESA program solicitation processes directed in D.21-06-015.[5] The letter outlined the following requirements: host contractor meetings; adhere to the solicitation process requirements outlined in D.21-06-015, D.18-10-008 Attachment A and corrected via D.19-01-003 and D.19-07-016; submit copies of solicitation documents and final contract copies to ED; communicate the solicitation process to all potential bidders; incorporate applicable terms into solicitation materials as detailed in Section 6.14.8.3 of D.21-06-015; and develop and maintain an ESA solicitation calendar. The

[4] On September 1, 2021, SCE served notice of its ESA Solicitation Plans on service list A.19-11-003. 2021-2026 ENERGY SAVINGS ASSISTANCE PROGRAM SOLICITATION PLAN (sce.com).

[5] Energy Savings Assistance Program Solicitations and Contractor Communications Letter, dated January 2, 2022.

IOUs were further directed to adhere to the following utility solicitation practices and principles: (1) conduct open, fair, and transparent solicitations; (2) structure and communicate the solicitations in a manner designed to attract a variety of diverse bidders, including small businesses and new entrants; and (3) select bidders and execute contracts that improve the services provided to low income customers and the communities around them. SCE incorporated all requirements into its solicitation process throughout 2022.

On January 26, 2022, SCE submitted Advice Letter 4702-E (later Advice Letter 4702-E-A, submitted on February 23, 2022) to shift unused 2021 MF CAM Funds to the ESA 2022 Budget to supplement SCE's PY 2022 budget.

Starting July 1, 2022, Senate Bill (SB) 756 redefined "low-income customers" to include persons and families whose household income is at or below 250% of Federal Poverty Guidelines (FPG). This modification expanded the eligibility for FERA customers to enroll into the ESA program. In 2022, SCE's ESA program was oversubscribed; therefore, SCE did not treat these newly eligible customers but rather opted to prioritize these customers in 2023. Please refer to ***Section 1.2.3*** for SCE's ESA ramp down/ramp up activities.

On September 2022, SCE successfully launched the Pilot Plus/Pilot Deep[6] (later renamed ESA Whole Home for customer facing instances) as directed in D. 21-06-015, Ordering Paragraph (OP) 42. ESA Whole Home is being jointly implemented by both SCE and Southern California Gas Company (SoCalGas). A full description of ESA Whole Home can be found below in ***Section 1.9***.

In addition, SCE coordinated and collaborated with the other IOUs on the following regulatory requirements:

- On July 1, 2022, the IOUs jointly submitted the Universal Application System (UAS) Recommendation Report pursuant to D.21-06-015, OP 46; and
- On December 31 2022, the IOUs jointly served the ESA WG Non Energy Benefits (NEBs) Study Progress Report which provides recommendations on the NEBs Study and stakeholder process pursuant to D.21-06-015, OP 86.

[6] D.21-06-015 references Pilot Plus/Deep; "ESA Whole Home" was decided upon and agreed after the fact.

1.1 Energy Savings Assistance Program Overview

1.1.1 Provide a summary of the Energy Savings Assistance Program elements as approved in D.21-06-015.

Main ESA Program Summary[7]			
	2022 Authorized Budget / Forecasted Planning Assumptions	2022 Actual	%
Budget	$ 63,719,040	$ 54,475,942	85%
Administrative Budget[8]	$ 5,665,542	$ 3,732,778	66%
Homes Treated	27,051	35,652	132%
kWh Saved	18,788,420	18,082,438	96%
kW Demand Reduced	7,147	2,687	38%
Therms Saved	NA	NA	NA
GHG Emissions Reduced (Tons)	NA	NA	NA

The ESA Main program served Single-family (SF), Mobile Home (MH), and Multifamily (MF) in unit residential customers. To qualify for ESA Main, households must receive electricity services from SCE, meet the program's income guidelines, and their appliances must meet feasibility requirements for measure replacement or installation. The ESA Main program is both for renters and homeowners. However, written permission from the property owner may be required for certain measure replacements. The table above summarizes the budget spent, homes treated, and savings generated for the PY.

7 Includes MF in-unit and SF and MH treatments but does not include MF CAM.

8 D.21-06-015 at p. 316 states "We approve a cap on administrative expenses for the ESA program at either 10 percent of total program costs, or the IOU's historical five-year average spend on administrative costs as a percentage of total program costs, whichever is greater. We phase out the use of the historical five-year average spend such that the IOUs must propose to spend no more than 10 percent of total program costs on administrative costs starting in program year 2024."

ESA Multifamily Common Area Measure (MF CAM) Program Summary			
	2022 Authorized Budget / Forecasted Planning Assumptions	2022 Actual	%
Budget	$ 1,800,000	$ 1,724,371	96%
Administrative Budget[9]			
MF Properties Treated	NA	44	NA
kWh Saved	NA	1,385,607	NA
kW Demand Reduced	NA	33.98	NA
Therms Saved	NA	NA	NA
GHG Emissions Reduced (Tons)	NA	NA	NA

In 2022, SCE continued to offer the Multifamily Common Areas Measure (MF CAM) program for property owners of deed-restricted properties. Multifamily properties are those with five or more dwelling units. 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.

ESA Multifamily Whole Building (MFWB) Program Summary[10]			
	2022 Authorized Budget / Forecasted Planning Assumptions	2022 Actual	%
Budget	NA	NA	NA
Administrative Budget	NA	NA	NA
MF Properties Treated	NA	NA	NA
kWh Saved	NA	NA	NA
kW Demand Reduced	NA	NA	NA
Therms Saved	NA	NA	NA
GHG Emissions Reduced (Tons)	NA	NA	NA

In 2022, the Southern IOUs (SDGE, SoCalGas, and SCE) initiated the solicitations for the implementation of the Multifamily Whole Building (MFWB)

9 D.21-06-015, at p. 368,states "Administrative costs shall be capped at 10 percent."

10 Implementation to occur no earlier than July 2023.

program. Since the program was not yet implemented, there are no results to report for 2022. MFWB is set to launch in mid-2023.

ESA Whole Home Program Summary			
	2022 Authorized Budget / Forecasted Planning Assumptions	2022 Actual	%
Budget	$ 3,884,864	$294,411	8%
Administrative Budget[11]			
Homes Treated			
kWh Saved (Plus = 5-15 Percent)		0	
kWh Saved (Deep = 15-50 Percent)		0	
kW Demand Reduced		0	
Therms Saved (Plus = 5-15 Percent)	NA	NA	NA
Therms Saved (Deep = 15-50 Percent)	NA	NA	NA
GHG Emissions Reduced (Tons)	NA	NA	NA

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 ED. This new redesigned pilot—ESA program Pilot Plus/Deep (PP/D), also known as ESA Whole Home—is a joint IOU pilot program between SCE and 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.[12]

11 D.21-06-015, Attachment 2 states "General Administration – Funds may be allocated for administration of the pilot, not to exceed 10 percent of the pilot budget."

12 *See* AL-4650-E.

ESA Building Electrification (BE) Program Summary (SCE Only)			
	2022 Authorized Budget / Forecasted Planning Assumptions	2022 Actual	%
Budget	$ 4,087,060	$ 123,402	3%
Administrative Budget	NA	NA	NA
MF Properties Treated	NA	0	NA
kWh Saved	NA	0	NA
kW Demand Reduced	NA	0	NA
Therms Saved	NA	NA	NA
GHG Emissions Reduced (Tons)	NA	NA	NA

The ESA Building Electrification (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.

ESA Clean Energy Homes Program Summary (SCE Only)			
	2022 Authorized Budget / Forecasted Planning Assumptions	2022 Actual	%
Budget	$1,810,000	$37,298	2%
Administrative Budget	NA	NA	NA
MF Properties Treated	NA	NA	NA
kWh Saved	NA	NA	NA
kW Demand Reduced	NA	NA	NA
Therms Saved	NA	NA	NA
GHG Emissions Reduced (Tons)	NA	NA	NA

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. The program is not launching until April 2023.

Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) Unspent Funds (Electric IOUs Only)[13]			
	2022 Authorized	Actual to Date	%
Budget	NA	NA	NA

There were no budget augmentation from Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) in 2022. By the last quarter of 2022, the SASH/MASH programs were still in the process of reconciling their budgets and expenses. If there are leftover funds from SASH/MASH, SCE expects to file an Advice Letter by June of 2023 to augment the ESA budget for 2023.

1.2 Marketing, Education, and Outreach (ME&O)

1.2.1 Provide a summary of the segmentation strategy employed (i.e., tools and analysis used to segment households how households are segmented and prioritized for treatment, and how this information is communicated to the contractor/CBO).

ESA Program – Contractor/CBO Marketing

In 2022, SCE continued to partner with ESA contractors and community-based organizations (CBO) to assess homes and deliver ESA program services in local communities. In years past, ESA marketing strategies were designed to reach and enroll as many eligible "first touch"—or new to the program—income-qualified households as possible. In 2022, the ESA marketing campaigns continued to

[13] D.15-01-027, Ordering Paragraph (OP) 12 ofstates "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 ED disposition of the Advice Letter.

target those customers who had not participated in the ESA program before, but the marketing shifted to targeting high energy usage customers, specifically those customers whose energy usage hit 300% of baseline at least once in the prior calendar year. Newly enrolled and existing CARE customers who had not previously participated in the ESA program, as well as high usage customers with the deepest potential for energy savings, were the segments prioritized for outreach and treatment in 2022.

SCE adjusted various outreach and enrollment activities in 2022 due to budget constraints and the implementation of its ramp-down strategy. The following are ways SCE prioritized customer segments for treatment and provided this information to contractors at various times throughout PY 2022:

- SCE aggregated leads in targeted geographic areas, and then allocated these leads among contractors who worked in those specific areas. This practice continued from January through September, when SCE halted new ESA enrollments into the program as further described in ***Section 1.2.3***.
- In addition to providing leads directly to the ESA service providers in their respective service areas, SCE sent promotional letters and emails to recently enrolled CARE customers who were high energy users, to inform them they may qualify for the ESA program. These SCE monthly marketing campaigns focused on specific counties or ZIP codes that the ESA service providers were targeting. In ***Section 1.2.2*** and ***Section 1.2.3***, the monthly marketing campaigns only ran from January through April in order to control new leads into the program.
    - Prior to a contractor contacting customers, SCE sent customers emails and direct mail letters with their assigned contractor's contact information, encouraging them to call to set up an appointment. Sending a comprehensive mix of communication materials prior to and possibly following the initial contact by the contractor provided context and built trust for the customer, thus increasing the chances of response and enrollment.
    - Due to the budget constraints and program ramp-down activities, the ESA marketing campaigns, and outreach activities were scaled proportional to service provider budget allocation for 2022.
- SCE continued to utilize the existing program database (EMAPS) throughout 2022, to help track program participation by lead type, neighborhoods with a dense low-income population, and low program penetration. Marketing and outreach tactics used in various neighborhoods were also tracked in EMAPS to evaluate effectiveness and provide guidance to SCE's contractors. More information on program participation by lead type is described in ***Section 1.2.2***, below.

With 2022 being a year of transition, SCE suspended contractor outreach (door-to-door canvassing) in March, to control incoming leads and the program budget as a result of program ramp-down activities. As a result of those canvassing outreach efforts that took place from January through March, approximately 3,700

ESA program leads were generated that produced about 1,850 ESA program enrollments. In May, the ESA program also suspended the direct targeting marketing campaigns such as direct mail and email. The suspension of these campaigns was an additional effort to control leads due to program ramp-down activities. ESA contractors continued to enroll customers through various channels, including SCE-generated leads from SCE's call center and the ESA webpage. The methods in how these customers were targeted and the various sources of targeted outreach are discussed in more detail in ***Section 1.2.2***, below.

1.2.1.1 Provide summary of how customers are targeted/referred to implementation Pilots (Pilot Plus and Pilot Deep and Building Electrification)

ESA Whole Home Segmentation

On June 7, 2021, the Commission issued D.21-06-015 approving the ED's ESA program redesign concept on a pilot basis, known as ESA Whole Home. 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 with targets between 5 percent to 50 percent per respective home.

D.21-06-015, Attachment 2 further requires that the IOUs target those customers that are deemed the neediest and have the ability and opportunity to achieve the specified percent savings per household as identified under the guiding principles. These customers may include:

- Customers that have been identified as being in multiple need states as discussed in Section 6.6 of D.21-06-015 or have been identified in at least one sub-category in each of the four main categories (Demographic, Financial, Geographic, Health). For example, customers who are high usage and medical baseline, and may also be a part of other, multiple need states are to be prioritized over customers who are only high usage.

Specifically, Section 6.6.1 states that, "For the 2021-2026 program cycle, the IOUs were asked to identify participant categories or housing types that will be specifically targeted for specific levels of treatment as well as discuss the approach used to identify and prioritize these groups." The segmentation and reporting criteria found in Attachment 3 of D.21-06-015 (listed below) was used as the basis from which customer segmentation was selected for generating and refining the potential customer participation list.

Demographic	Financial	Location	Health Condition
Housing Type	CARE	DAC	Medical Baseline
Rent vs Own	Disconnected	Rural	Respiratory
Previous vs new participant	Arrearages	Tribal	Disabled
Seniors	High Usage	PSPS Zone	
Veterans	High energy burden	Wildfire Zone	
Hard-to-reach	SEVI	Climate Zone	
Vulnerable	Affordability Ratio	CARB Communities	

For purposes of the ESA Whole Home, both SCE and SoCalGas performed a data scrub to isolate customers that met the following requirements: (1) residing in Los Angeles, Riverside, and San Bernardino Counties; and (2) usage consumption equal to or greater than 300%+ Baseline for Electric between November 2021 and November 2022, and 200%+ Baseline for Gas during winter months. This data along with the selected segmentation criteria (see table below) will be used by the pilot evaluator to formulate the cohorts that will be provided to the implementation team for customer contact, enrollment, and installation of appropriate service(s).

Selected segmentation data as follows:

Segmentation Category	Field(s) to be weighted
Demographic	Housing Type (SF/MH)
Financial	CARE and High Usage
Location	Disadvantage Communities (DAC) and Climate Zone (CZ)
Health	Medical Baseline (MBL)

Building Electrification Pilot Segmentation

As for the BE Pilot, there were no customers targeted nor referred in 2022 largely due to administrative activity necessary to get a third-party implementer on board. In Quarter 1 of 2023, SCE and the implementer launched the BE Pilot to begin targeting customers. The BE Pilot will target customers living in single-family homes, in disadvantaged communities, and on the CARE rate. SCE plans to analyze customer consumption data with high annual usage and potentially high cooling loads to identify customers likely to benefit from electrification. Additionally, the BE Pilot

intends to integrate the ESA Main program to streamline and leverage operations in order to maximize the services provided to eligible customers.

1.2.2 Provide a summary of the customer segmentation strategies employed (i.e., tools and analysis used to identify customers based on energy usage, and other factors) and how these customer segments are targeted in program outreach.

ESA Program – Direct Marketing to Customers

In 2022, SCE conducted multiple outreach strategies to reach residential customers with both high energy use and energy burden. SCE continued to use a Propensity Model Analysis with new customer analytics to target the most desirable segments for ESA participation. Direct targeting in 2022 streamlined customer acquisition campaigns by using predictive statistical analytics to ascertain among non-ESA enrolled prospects those most likely to be approved for ESA enrollment and, most preferably, ESA treatment. The direct targeting methodology described below was used to determine the best customers to include in the ESA direct mail and email marketing campaigns that ran from January through April of 2022.

The direct targeting strategy used predictive statistical models to estimate the probability and levels of high usage of non-ESA enrolled residential customers based on their socioeconomic, demographic, and geographic profile. The statistical analysis utilizes binary logistic regression models that yield an estimated probability of the household being approved for ESA enrollment or treatment. Outreach to targeted leads proceeds according to rank of the estimated probabilities of such high usage from highest to lowest cohorts of scored prospects. This estimated probability is based on the unique configuration of such socioeconomic and demographic characteristics as:

- Financial: CARE or FERA, Arrears or Disconnections, High Energy Burden, Socioeconomic Vulnerability Index (SEVI), Affordability Ratio
- Demographic: Renters or homeowners, Seniors, Vulnerability index
- Location: Disadvantaged Communities (DAC), Rural or Tribal area, Public Safety, Power Shut-off (PSPS), High Fire Risk Area (HFRA), Climate Zone
- Health: Medical Baseline Allowance[14] (MBL), Respiratory conditions (e.g., Asthma), Disabled

This information is obtained from the Axiom third-party vendor-provided database. Results of the monthly ESA customer acquisition campaigns serve as a

[14] Medical Baseline Allowance program is for household's where a full-time resident requires the regular use of electrically-powered medical equipment or other qualifying medical devices. This program provides an additional 16.5 kilowatt-hours (kWh) of electricity per day. Provided at the lowest baseline rate, this helps offset the cost of operating the medical equipment. Medical Baseline Allowance | Help Paying Your Bill | Your Home | Home - SCE.

foundation for the refinement of these models to further enhance their predictive capabilities and continue to enhance efforts to prioritize non-ESA enrolled high energy users.

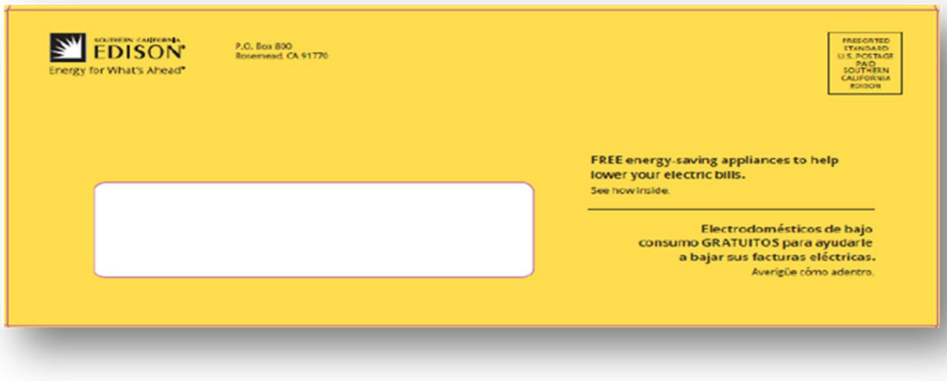
SCE continued to leverage CARE's High Usage customers whose usage was identified as exceeding 400% to 600% (or more) above the baseline. These customers have been income verified through CARE and are now required to participate in the ESA program to continue to receive the CARE rate. In 2022, the ESA program referred approximately 450 of these customers to SCE's contractors as leads which resulted in about 100 households enrolled into the ESA program to receive energy-saving services.

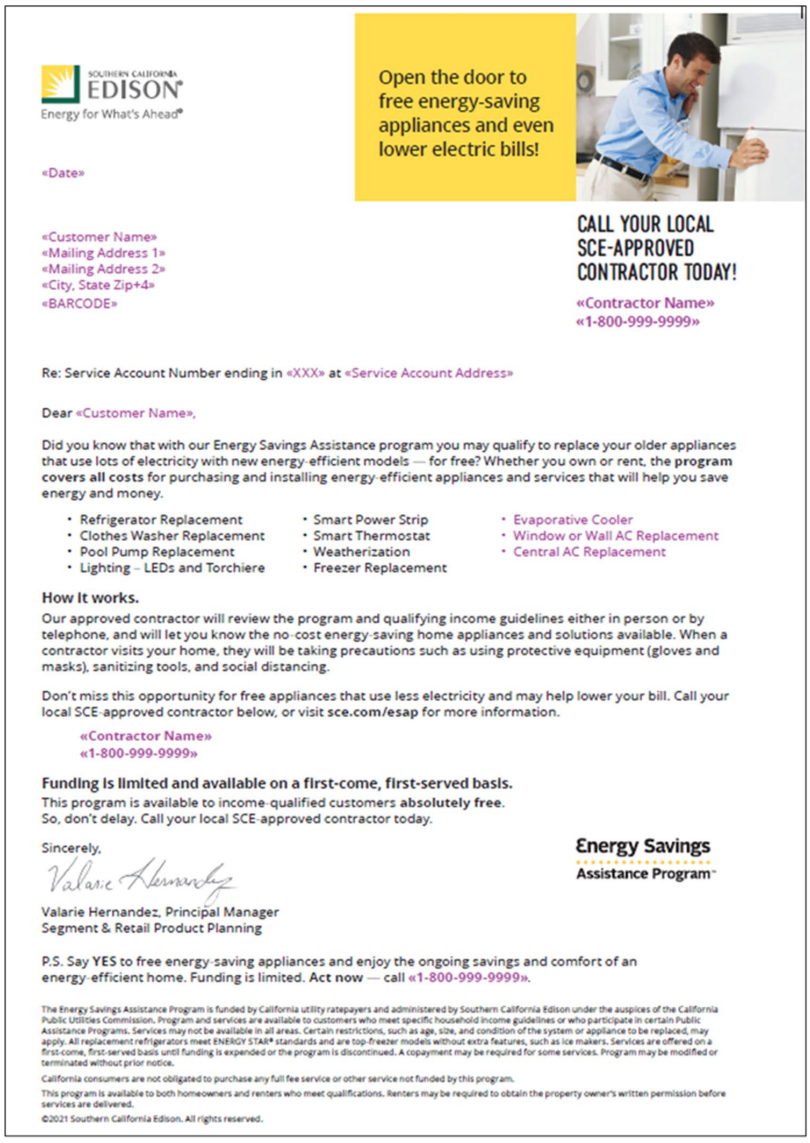
The following sections describe some of the traditional and targeted marketing and outreach activities SCE conducted in 2022 to inform customers identified through the direct targeting methods described above about the ESA program:

Direct Mail:

In 2022, SCE sent approximately 200,000 direct mailers to CARE customers with a high probability of being eligible for the ESA program. Starting in 2022, ESA marketing campaigns also targeted high energy usage customers, whose usage hit 300% of baseline at least once in the prior calendar year. The letters included messaging about the ESA program's virtual option for enrollment. Each letter also provided customers with the name and phone number of their local SCE ESA program contractor, allowing contractors to directly receive information on interested customers and could lead to potential enrollments. This streamlined process created efficiencies for both customer and contractor. The ESA direct mail campaign ran through April 2022 and generated approximately 4,080 leads and 2,300 enrollments.

The campaign's messaging for customer acquisition is shown in the illustration below (the letters are double-sided English/Spanish).





SOUTHERN CALIFORNIA EDISON®
Energy for What's Ahead®

Open the door to free energy-saving appliances and even lower electric bills!

«Date»

«Customer Name»
«Mailing Address 1»
«Mailing Address 2»
«City, State Zip+4»
«BARCODE»

CALL YOUR LOCAL SCE-APPROVED CONTRACTOR TODAY!
«Contractor Name»
«1-800-999-9999»

Re: Service Account Number ending in «XXX» at «Service Account Address»

Dear «Customer Name»,

Did you know that with our Energy Savings Assistance program you may qualify to replace your older appliances that use lots of electricity with new energy-efficient models — for free? Whether you own or rent, the **program covers all costs** for purchasing and installing energy-efficient appliances and services that will help you save energy and money.

- Refrigerator Replacement
- Clothes Washer Replacement
- Pool Pump Replacement
- Lighting – LEDs and Torchiere
- Smart Power Strip
- Smart Thermostat
- Weatherization
- Freezer Replacement
- Evaporative Cooler
- Window or Wall AC Replacement
- Central AC Replacement

How it works.
Our approved contractor will review the program and qualifying income guidelines either in person or by telephone, and will let you know the no-cost energy-saving home appliances and solutions available. When a contractor visits your home, they will be taking precautions such as using protective equipment (gloves and masks), sanitizing tools, and social distancing.

Don't miss this opportunity for free appliances that use less electricity and may help lower your bill. Call your local SCE-approved contractor below, or visit **sce.com/esap** for more information.

«Contractor Name»
«1-800-999-9999»

Funding is limited and available on a first-come, first-served basis.
This program is available to income-qualified customers **absolutely free**.
So, don't delay. Call your local SCE-approved contractor today.

Sincerely,

Valarie Hernandez, Principal Manager
Segment & Retail Product Planning

Energy Savings Assistance Program®

P.S. Say **YES** to free energy-saving appliances and enjoy the ongoing savings and comfort of an energy-efficient home. Funding is limited. **Act now** — call «1-800-999-9999».

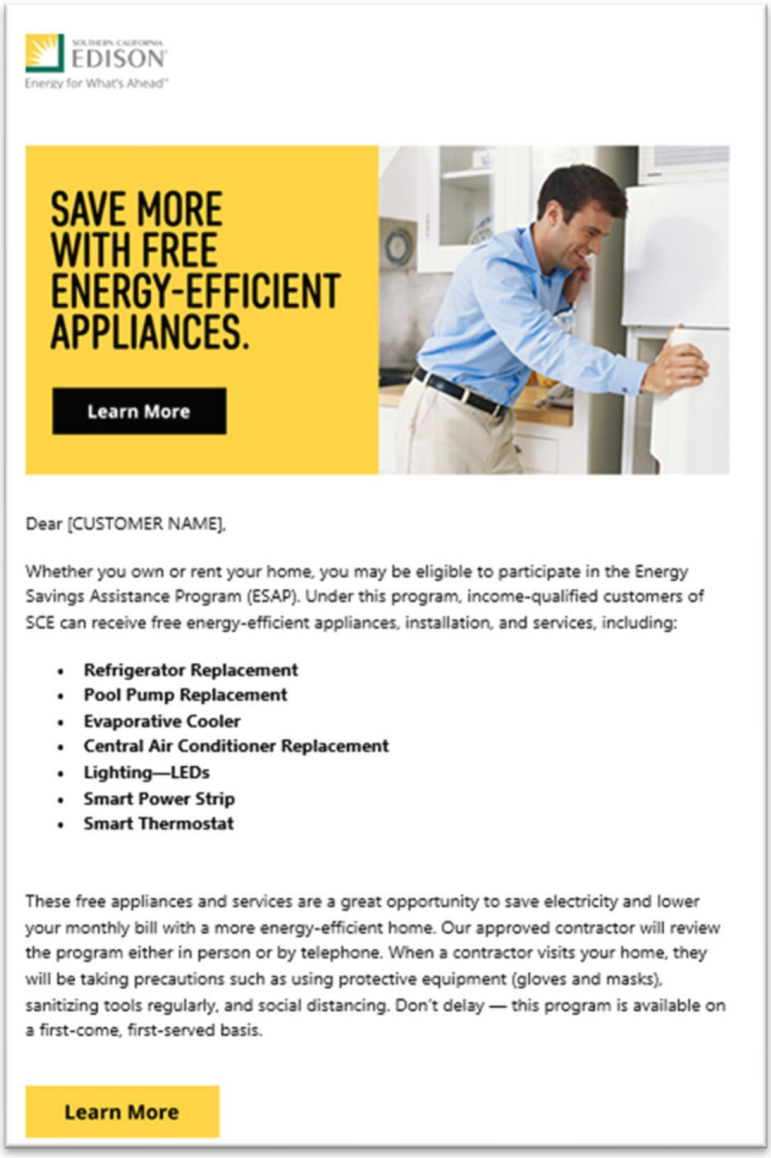
The Energy Savings Assistance Program is funded by California utility ratepayers and administered by Southern California Edison under the auspices of the California Public Utilities Commission. Program and services are available to customers who meet specific household income guidelines or who participate in certain Public Assistance Programs. Services may not be available in all areas. Certain restrictions, such as age, size, and condition of the system or appliance to be replaced, may apply. All replacement refrigerators meet ENERGY STAR® standards and are top-freezer models without extra features, such as ice makers. Services are offered on a first-come, first-served basis until funding is expended or the program is discontinued. A copayment may be required for some services. Program may be modified or terminated without prior notice.

California consumers are not obligated to purchase any full fee service or other service not funded by this program.

This program is available to both homeowners and renters who meet qualifications. Renters may be required to obtain the property owner's written permission before services are delivered.

Email:

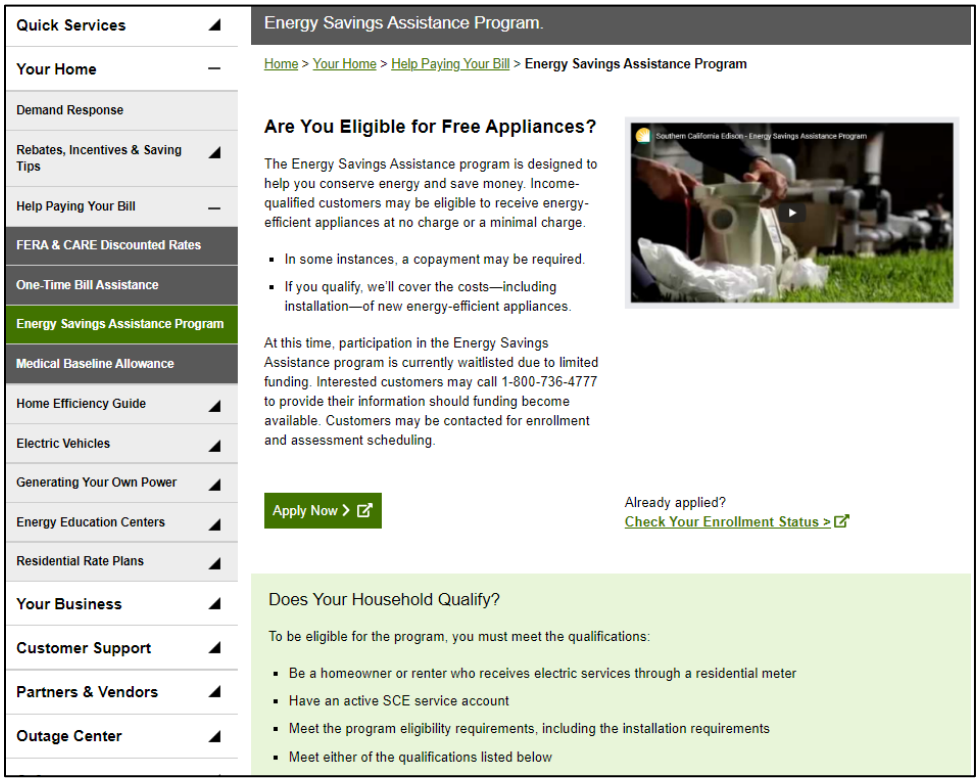
SCE deployed about 145,000 ESA program promotional emails in the months of January through April. The monthly email campaigns generated approximately 190 leads and about 45 enrollments. See the Email Marketing Sample illustration, below:



ESA Webpage:

The ESA program webpage (www.sce.com/esap) provides information on program eligibility and services. Customers can apply for the ESA program directly online. Due to program ramp-down activities and a more limited budget, the ESA program moved to a waitlist for interested customers in May 2022. SCE revised its ESA program webpage to include language explaining that customers could call SCE's call center so that they may be contacted for enrollment and assessment scheduling should funding become available. In 2022, SCE received about 9,450 ESA related internet leads which resulted in approximately 1,970 enrollments.

An illustration of the ESA webpage is shown below:



Outbound Calls:

SCE's outbound calling campaign provides customer leads directly to the ESA program contractors for outbound calls. SCE was focused on generating leads for its contractors from newly enrolled CARE participants who had never participated in the ESA program. In 2022, ESA contractors directly enrolled approximately 5,900 CARE customers into the ESA program.

Inbound Calls:

Customers who called SCE's Customer Contact Center (CCC) were informed, referred, and assigned to ESA program service providers in their respective areas. The ESA service provider then followed up on the lead and contacted the customer to assess eligibility and enrollment in the ESA program. In 2022 the CCC received about 5,000 ESA-related calls, from which over 2,470 customers were successfully enrolled in the ESA program.

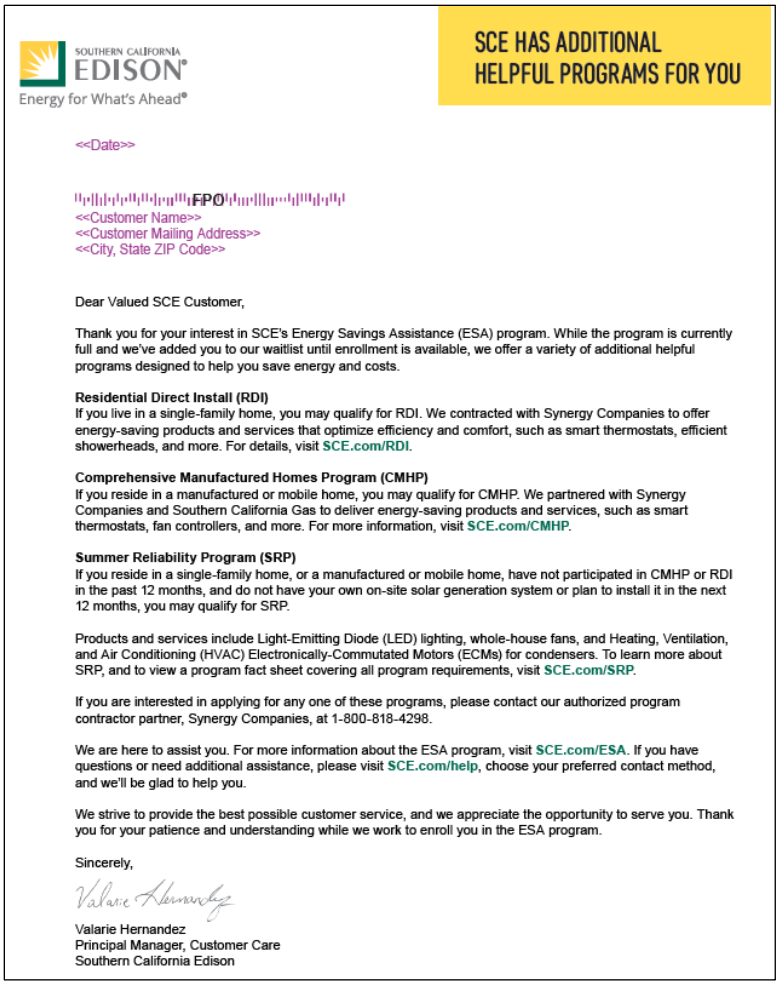
The ESA program moved to a waitlist for interested customers in May 2022 due to program ramp-down activities and the limited budget. When customers called SCE's CCC, they were informed that participation in the ESA program was waitlisted due to limited funding. Interested customers were asked to provide their information and told they may be contacted for enrollment and assessment

scheduling should funding become available. Throughout 2022, SCE received approximately 13,000 ESA-related calls from interested customers that were placed on the waitlist. As funding allowed throughout the year, over 4,500 waitlist leads were assigned to contractors to follow up and assess eligibility, which resulted in over 865 enrollments in the ESA program. The remaining waitlist leads will be prioritized for outreach in 2023.

Outreach to Waitlisted Customers:

In 2022, SCE sent approximately 8,700 letters to SCE customers as a reminder that SCE has additional programs to help save energy and costs. In order to continue to serve these customers, waitlist customers were offered alternative energy efficiency program offerings to help them save energy. The customers were still able to opt to wait to enroll in the ESA program once funding becomes available in 2023. These programs include:

- Residential Direct Install (RDI): SCE customers that reside in single-family homes may be eligible for energy-saving products that optimize air conditioning operation, efficiency, and comfort. Products and services may include a Smart Thermostat, Electronic Fan Delay Controller, Duct Test and Seal, and more.
- Comprehensive Manufactured Homes Program (CMHP): SCE customers that reside in a manufactured or mobile home may be eligible for energy-saving products and services for light fixtures, low-flow showerheads, and pipe-wrap.
- Summer Reliability Program (SRP): SCE customers that reside in a single-family home, or a manufactured or mobile home, have not participated in CMHP or RDI in the past 12 months, and do not have on-site solar generation system or plan to install it in the next 12 months, may qualify for SRP. Products and services include Light-Emitting Diode (LED) lighting, whole-house fans, and Heating, Ventilation, and Air Conditioning (HVAC) Electronically Commutated Motors (ECMs) for condensers.



SOUTHERN CALIFORNIA EDISON®
Energy for What's Ahead®

SCE HAS ADDITIONAL HELPFUL PROGRAMS FOR YOU

<<Date>>

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

Dear Valued SCE Customer,

Thank you for your interest in SCE's Energy Savings Assistance (ESA) program. While the program is currently full and we've added you to our waitlist until enrollment is available, we offer a variety of additional helpful programs designed to help you save energy and costs.

Residential Direct Install (RDI)
If you live in a single-family home, you may qualify for RDI. We contracted with Synergy Companies to offer energy-saving products and services that optimize efficiency and comfort, such as smart thermostats, efficient showerheads, and more. For details, visit SCE.com/RDI.

Comprehensive Manufactured Homes Program (CMHP)
If you reside in a manufactured or mobile home, you may qualify for CMHP. We partnered with Synergy Companies and Southern California Gas to deliver energy-saving products and services, such as smart thermostats, fan controllers, and more. For more information, visit SCE.com/CMHP.

Summer Reliability Program (SRP)
If you reside in a single-family home, or a manufactured or mobile home, have not participated in CMHP or RDI in the past 12 months, and do not have your own on-site solar generation system or plan to install it in the next 12 months, you may qualify for SRP.

Products and services include Light-Emitting Diode (LED) lighting, whole-house fans, and Heating, Ventilation, and Air Conditioning (HVAC) Electronically-Commutated Motors (ECMs) for condensers. To learn more about SRP, and to view a program fact sheet covering all program requirements, visit SCE.com/SRP.

If you are interested in applying for any one of these programs, please contact our authorized program contractor partner, Synergy Companies, at 1-800-818-4298.

We are here to assist you. For more information about the ESA program, visit SCE.com/ESA. If you have questions or need additional assistance, please visit SCE.com/help, choose your preferred contact method, and we'll be glad to help you.

We strive to provide the best possible customer service, and we appreciate the opportunity to serve you. Thank you for your patience and understanding while we work to enroll you in the ESA program.

Sincerely,

Valarie Hernandez
Principal Manager, Customer Care
Southern California Edison

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

In general, the components of the ESA program enrollment, assessment, energy audit, measure installation, and inspection services have not changed. However, due to PY 2022 being a transition year, SCE adjusted various program delivery strategies to address operational constraints and implement a program ramp-down strategy.

In recent years past, SCE's program outreach strategy has been in a continuous ramp-up state where the focus was casting a wide net with broad marketing campaigns, contractor outreach, canvassing, and leveraging activities to help increase participation and continued awareness of the ESA program to meet home treated goals. The success of last year's outreach and enrollment activities contributed to the large amount of carryover enrollments from 2021 that had pending installation jobs that needed to be completed in 2022. The following efforts were taken in 2022 to address operational constraints, mitigate

overspending, meet energy savings goals, and implement SCE's ramp-down strategy:

- The ESA program suspended contractor outreach (canvassing) in March to control leads and the program budget during this transition year.
- In May, the program also suspended the direct targeting marketing campaigns such as direct mail and email. The suspension of these campaigns was an additional effort to control leads due to program ramp-down activities. As of May, the ESA program had already exceeded its home treated target for 2022.
- Also in May, the ESA program moved to a waitlist for interested customers. Waitlisted customers were those who had expressed interest to enroll via SCE's call center or online interest form. A contractor visit had not been scheduled, customer documents had not been submitted and no measures have been provided. When customers called SCE's CCC, they were informed that participation in the ESA program was currently waitlisted due to limited funding. Interested customers were asked to provide their information and should funding become available they would be contacted for enrollment and assessment scheduling. SCE also revised its ESA program webpage to explain the waitlist. SCE worked with ESA contractors to develop approved verbiage contractors were asked to use when customers contacted them directly regarding enrollment within the ESA program while the waitlist was in effect.
- In June 2022, the ESA program advised all installation contractors to stop enrollment activities in order to focus their efforts and remaining budgets on completing pending installation jobs for customers that had already enrolled.
- SCE took additional initiatives to phase out new ESA enrollments during program ramp down. SCE engaged with enrollment contractors through one-on-one meetings during the first week of August to discuss plans to cease new ESA enrollments by September 1, 2022. SCE used these meetings to seek feedback and provide information about its plans to review contractor spend and rebalance budgets to avoid under/overspending.
- On September 1, 2022, new ESA enrollments stopped, and SCE continued to utilize the waitlist for interested customers. SCE retained one contractor to complete enrollments for CARE High Usage customers and Emergency Disaster Relief, as the ESA program provides income qualified customers Emergency Protections as a result of a disaster occurring in SCE's service territory. When a customer contacts SCE to self-identify as being impacted by a disaster, 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. Leads SCE obtained from these activities were assigned to local contractors for them to contact the customer directly for program enrollment.
- To better manage the program budget and address operational constraints, SCE decided to temporarily suspend new installations of various measures throughout 2022. This decision was made to optimize the measure mix to maximize savings and improve cost-effectiveness during program ramp down. Measures such as Room Air Conditioners and Standalone Smart Thermostats

in non-hot climate zones were temporarily suspended due to the low savings they contribute. Additionally, SCE decided to suspend Freezers, Outdoor Porch Light Fixtures, Washing Machines, and Efficient Fan Controllers (EFC), which are measures that are procured by the contractors themselves and not bulk purchased by SCE, so that contractors would not have to pay for them upfront and run the risk of not depleting their inventory by the end of the PY. SCE requested that contractors continue to assess for these measures so that ESA program administrators would have a record for possible delivery at some point in the future if budget allowed for the work to be completed.

- Throughout 2022, SCE continued to optimize the portfolio by installing high energy savings measures (Evaporative Coolers, Pool Pumps and Refrigerators) while balancing all programmatic objectives.
- SCE sent letters to approximately 17,000 customers who had been eligible for the installation of an energy saving measure but for whom the installation was never completed because the contractor was not able to get in contact with the customer. The letter encouraged the customer to call the ESA contractor to schedule the appointment for installation of the measure before the end of the year. This effort was aimed at driving additional installation work to the ESA contractors as well as helping SCE work toward its energy saving goal for 2022.
- There were no new strategies for inspection services in 2022. SCE was in the process of developing the new Heating, Ventilation, and Air Conditioning (HVAC) and inspections process to be launched in 2023.

1.2.4 Describe Tribal outreach activities, including a summary of the biannual Tribal meetings, and an up-to-date list of Tribal contacts, including progress towards meeting goal for relationships with non-federally recognized tribes.

SCE continued outreach activities within SCE's Tribal communities in 2022. SCE hosted a booth at both Morongo and Soboba's Earth Day Events in April, as well as Pechanga's Open House in October. During these events, SCE met with Tribal members, discussing a variety of SCE programs, highlighting the various income-qualified programs (including ESA, CARE, and FERA), and distributing program materials. SCE's Tribal liaisons met with all 13 federally recognized Tribes in SCE's service territory at least twice in 2022, delivering information for various SCE programs including income-qualified programs, and SCE continued efforts to identify and reach out to non-federally recognized Tribes. SCE also continued to target Tribal communities through marketing. Zip codes throughout Tribal communities were included in ESA marketing campaigns throughout the year. Residents received ESA mailers detailing program offerings and directing them to local ESA contractors.

In August, in partnership with San Diego Gas and Electric (SDG&E) and the Morongo Band of Mission Indians, SCE hosted the first-ever Tribal Leaders Clean Energy Summit. Tribal leaders and executive staff attended the all-day

hybrid (in person and virtual) summit to review topics including Pathway 2045,[15] Microgrids,[16] Charge Ready,[17] building electrification[18] and hydrogen, as well as Federal and State Assistance and grant funding for Tribal energy projects. SCE representatives participated in the event from multiple company units, including Business Customer Division, Local Public Affairs, Edison International, and Customer Programs & Services. Outside agency presenters included the Department of Energy Office of Indian Energy, CPUC, California Energy Commission (CEC), Native American Land Conservancy, and GRID Alternatives, who highlighted best practices for Tribal Clean Energy projects and funding opportunities. Representatives from 8 of SCE's 13 Native American Tribes attended along with Tribes from SDGE's territory. The feedback from attendees was positive, stating they were able to glean some useful information.

SCE's Tribal liaisons began engaging Tribal leaders to offer Tribal Outreach grants, which are mini-grants that provide funding to help communicate about low-income programs and other services. Mini-grant recipients agree to attend informational meetings throughout the year to discuss SCE's income-qualified programs. Tribal leaders can then serve as liaisons and distribute program information to their communities to increase awareness and participation in all eligible programs. Additionally, in various decisions related to the Public Safety Power Shut-Off (PSPS) program, the CPUC directed the electric utilities to work with public safety partners, which includes Tribal governments, to identify assistance required by current and potentially eligible MBL program customers during de-energization events. To effectively meet these requirements, these mini-grants include funds to assist customers in tribal communities that have access and functional needs (AFN) and/or qualify for the MBL program to self-identify, as well as to assist in education, outreach, and enrollment efforts.

SCE secured one-on-one meetings with six (6) tribes to offer the mini-grants. The following three (3) tribes signed mini-grant agreements in 2022: Bridgeport Indian Colony, Timbisha Shoshone, Tule River Indian Tribe.

In accordance with D.21-06-015, SCE confirms that it has an up-to-date list of Tribal contacts. Due to customer privacy concerns, SCE is unable to provide an actual list of contact names as that information is not public.

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15 https://www.edison.com/our-perspective/pathway-2045.

16 https://energized.edison.com/stories/the-microgrid-solution.

17 https://www.sce.com/evbusiness/chargeready.

18 https://www.sce.com/partners/partnerships/All-Electric-Homes.

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

Prior to 2019, the smart communicating thermostat was available only to customers who had received a replacement central air conditioning (A/C) from the ESA program. This change was made in part to support efforts under AB 793. The total number of smart communicating thermostats installed, and their energy savings are shown in Table A-2, Expenses & Energy Savings by Measures Installed referred to in the Appendix. In 2022, SCE continued offering smart communicating thermostats to all ESA customers with a compatible working central A/C unit.

In accordance with D.14-05-016, PG&E, SCE, and SDG&E were directed to select a disaggregation vendor, or its subcontracted vendor, to create individual CARE program customer reports that illustrate disaggregated household usage by end use, over time. These reports were to be accessible to ESA program contractors and customers and coordinated with the customer self-service functionalities that are available on the respective utilities customer portal common referred to as My Energy or My Account. Weekly meetings were conducted with the consultant, Uplight representatives from the other IOUs and the ED and delivered the Customer Profiles / Segmentation Files bi-annually. These reports were developed to be leveraged by Energy Efficiency (EE) and Demand Response (DR) programs for outreach.

The final report that was shared via webinar in Quarter 4 (December) 2020 summarized key findings, lessons learned, and recommendations from Phase II, which proposed to expand the analysis to a wider group of customers and deliver a summary of results to customers and ESA contractors. Due to SCE's customer system re-platforming rollout, the implementation and usage of the report is delayed, and the utility will continue to work with Uplight in 2023 to develop and provide the Contractor and Customer reports via MyAccount.

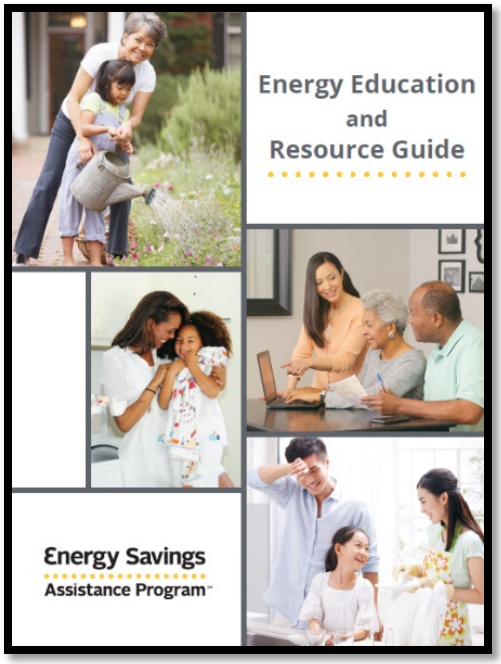
Additionally, information about SCE's DR programs was added to the in-home energy education that was provided to customers; this was completed at both the enrollment and assessment phase as well as the installation phase, when applicable. The cost for the leave behind materials (flyers, enrollment pamphlets, etc.) was paid for by the respective DR program.

1.2.6 Managing Energy Use

SCE's ESA contractors continue to review and provide a copy of the ESA program's Energy Education and Resource Guide (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 Guide 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 MyAccount, 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 rebates and demand response programs.



[19]

1.2.7 Services to Reduce Energy Bills

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

[19] Cover of the Statewide Energy Education Resource Guide currently being utilized.

1.3 Energy Savings Assistance Program Customer Enrollment

1.3.1 Report the number of customers or households treated, the IOU specific 2022 household treatment target, and the percentage of households treated. If the IOU was not able to reach the total household target, please explain.

The ESA program surpassed its 2022 annual homes treated target. SCE treated a total of 35,652 homes, which represents 132% of the target. SCE implemented the strategies listed below that helped the program exceed annual targets:

- Enrolled first touch customers as well as customers that have already participated, offering them additional energy saving measures.
- Sized marketing mailers and emails to customers proportionally with program budgets. SCE deployed marketing campaigns to customers that have never participated in the ESA program before, also focusing on customers that were identified as being high energy users.
- Updated the EMAPS database to provide leads for service providers to directly contact customers while active enrollment activities were ongoing.
- Continued offering the virtual ESA program to customers to provide a way to enroll in ESA without face-to-face interaction.
- Continued efforts outreaching to tribes so that members and residents can be enrolled in the program.
- Proactively identified factors that may have impacted ongoing delivery of measures such as supply chain issues. To mitigate this, SCE assigned work to installation contractors where there was no supply chain issues. SCE also worked with program equipment vendors to supply comparable substitute models for inventory experiencing delays and shortages.

1.3.2 Please summarize new efforts to streamline customer enrollment strategies, including efforts to incorporate categorical eligibility and self-certification.

In 2022, SCE continued to streamline the customer enrollment process and incorporate categorical eligibility and self-certification by offering a virtual ESA enrollment option for customers. In 2022, ESA contractors enrolled approximately 3,560 customers via the virtual enrollment option. For the virtual enrollments, SCE continued to offer the Self-Certification Affidavit in lieu of providing income documents.

1.3.3 If the IOU has failed to meet its annual energy savings goal, please provide an explanation of why the goal was not met. Explain the programmatic modifications that will be implemented in order to accomplish future annual energy savings goals.

The ESA program surpassed its 2022 annual energy savings goal. SCE saved a total of 19,468,045 kWh, which represents 103% of the goal, encompassing single

family, mobile home, multifamily in-unit, and multifamily common area measure installations. The following programmatic modifications are being implemented next year in order to continue meeting energy saving goals:

- Tiered Offering – Basic and Basic Plus. Low energy users will be 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 savings, will be offered more expensive measures such as clothes washers, dishwashers, and various HVAC systems (Basic Plus measures).
- Targeted Outreach by SCE based on energy usage vs. contractors outreaching. SCE will be implementing a 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.
- Fuel Substitution measures will also be offered. SCE is offering highly efficient Heat Pump HVAC systems and Heat Pump Water Heaters to replace gas and propane fueled systems where feasible.
- SCE will attempt to streamline and leverage operations with SCE's new pilots in order to serve the customer with a complete and beneficial energy saving and electrification measure package.

1.4 Disability Enrollment Efforts

1.4.1 Provide a summary of efforts to which the IOU is meeting the 15% enrollment goal.

SCE continued its efforts to identify and enroll low-income customers with disabilities. SCE's system of record does not collect information on a customer's or a household member's disabilities. This also complies with privacy protections, and laws such as Americans with Disabilities Act (ADA) and Health Insurance Portability and Accountability Act (HIPAA).

Targeted customer outreach efforts encouraged households to reach out to ESA service providers to schedule an assessment of their homes to determine eligibility for program measures. SCE does not specifically inquire if a customer or someone in their household is disabled. A customer may state (self-identify) that they, or someone in their household, is disabled. Alternatively, during the in-home assessment, the service provider representative may learn that someone living in the home is disabled.

1.4.2 Describe how the Energy Savings Assistance Program customer segmentation for ME&O and program delivery takes into account the needs of persons with disabilities.

SCE's Marketing Education and Outreach (ME&O) efforts continued to identify segments more likely to include disabled customers by collaborating with organizations focused on the needs of the disabled community. SCE leverages certain disability-related information in its internal account system, such as MBL enrollments, so customer households interested in participating in the ESA program are identified as having at least one household member with a disability. As stated in ***Section 1.2.2***, MBL is a characteristic that is included in the direct targeting predictive statistical models used to prioritize those households most likely to be approved for ESA enrollment. In its training workshops delivered to ESA service providers, SCE includes guidelines on proper etiquette to observe when working with customers with disabilities. Through this approach, assessment, installation, and inspection service providers can customize service delivery for households based on their specialized needs.

To inform individuals about the ESA program, SCE provides targeted direct mail letters and emails in both English and Spanish to customers who have not participated in the program. ESA informational flyers used by program contractors in outreach activities are provided in English, Spanish, Chinese, Korean, Cambodian, Tagalog/Filipino, and Vietnamese. SCE also provides access to on-demand translation services for ESA program contractors. This in-language support is provided by a third-party to further assist ESA program contractors with customer enrollment, assessment, installation, or inspection activities while in customers' homes where they do not speak the language. Various languages are available for translation, including American Sign Language (ASL).

In addition, SCE continues to provide the statewide Energy Education and Resource Guide in a large font format, with increased font sizes for headlines, sub-headlines, and text, for customers with partial vision to read helpful energy savings tips provided. SCE also continues to provide the Guide information in Braille for blind or low vision customers.

1.4.3 Identify the various resources the IOUs utilize to target the disabled community and the enrollments as a result.

Most ESA enrollments come from various sources such as SCE Referrals, Joint Utility, or Outreach efforts, which consist of a sub-set of customers who voluntarily self-identified themselves and/or a household member as disabled, or who were enrolled from the MBL or CARE programs. SCE Referrals are enrollments from various SCE sources such as marketing campaigns, the calls to the CCC, and sign ups from SCE.com. These leads can also be from other SCE programs such as CARE or MBL. Joint Utility enrollments are from efforts from

SCE and another utility such as SoCalGas or SouthWest Gas. Outreach enrollments result from contractor outreach and door knocking activities.

See 2022 Disability Enrollments table below for information on enrollment numbers of customers with disabilities.

2022 Disability Enrollments			
Source	**Total Enrollments**	**Disability Enrollments**	**% of Disability Enrollments**
SCE Referral	15,207	1,916	**13%**
Joint Utility	17,557	1,664	**9%**
Outreach	2,888	203	**7%**
Total	**35,652**	**3,783**	**11%**
Target Enrollment Rate			***15%***

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

In 2022 SCE did not meet the 15% overall target enrollment goal by enrolling only 11% of ESA participants from the disabled community. All three sources fell short, with Joint Utility at 9%, SCE Referral at 13%, and Outreach at 7%. SCE is legally not allowed to ask customers or household members if they have disabilities and must rely on customers with disabilities to voluntarily self-identify for tracking purposes.

Also, as mentioned previously, SCE continued virtual ESA enrollments to allow for customer enrollment without face-to-face interaction. By doing virtual enrollments, SCE does not get the "visual" information collected at the time of enrollment to be able to accurately indicate the number of customers with a disability.

In 2021, SCE continued a relationship with Significant Communications, for an ongoing outreach initiative to the deaf community. In 2022, SCE had to end the partnership with Significant Communications as the program was ramping down and phasing out new enrollments. The partnership also did not result in increased enrollments in the deaf or hard of hearing community. SCE will be exploring new efforts in the hard-to-reach and disabled communities through innovative initiatives and partnerships in 2023. It must be noted, however, that SCE still has the ability to communicate with any deaf or hard of hearing customers through the translation services SCE has obtained through a third-party company.

1.5 Leveraging Success, Including LIHEAP

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

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

The Sections below describe SCE's leveraging efforts for PY 2022.

1.5.1 Describe the efforts taken to reach out and coordinate the Energy Savings Assistance Program with other related low-income programs offered outside the IOU that serve low-income customers.

In 2022, SCE shared ESA program customer leads and enrollments with the following programs: Disadvantaged Community – Single-family Solar Homes (DAC-SASH) and Solar On Multi-family Affordable Housing (SOMAH). The DAC-SASH program provides assistance in the form of upfront financial incentives toward installation of solar generating systems on homes of low-income homeowners who are resident homeowners of single-family homes in DAC areas. SCE receives a list of new DAC-SASH participants on a monthly basis from the DAC-SASH contractor. SCE then provides these as leads to ESA program contractors for potential enrollments.

The SOMAH program provides energy credits to owners to lower electricity bills for common areas and tenants, as well as provide opportunities for jobs and training for tenants. SCE receives a list of new SOMAH participants a monthly basis from the SOMAH contractor. SCE then provides these as leads to ESA multifamily contractors for potential enrollment.

SCE also continues to bi-directionally share enrollment data with SoCalGas, PG&E, and Southwest Gas to identify eligible households. Additionally, SCE leverages the CMHP contractor to identify and enroll eligible mobile homes into the ESA program. The CMHP offers a specific set of HVAC energy efficiency services for dwellings and common areas of manufactured housing in SCE service

area. These services are provided at no cost to the owners and renters regardless of income. Households which income qualify for the ESA program may receive additional services not available in the CMHP.

Each of these successful leveraging tactics saves marketing and outreach funds, as well as increasing program enrollment and energy savings.

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

Leveraging with the CMHP program likely increases ESA program awareness amongst mobile home households in general by word of mouth, with enrollees telling their neighbors and friends about what the program did for them.

1.5.3 Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented for this program year? What was the result in terms of new enrollments?

Although no projects were completed in 2022, SCE will continue to seek leveraging opportunities with customers served by the California Department of Community Services & Development's (CSD) Low-Income Weatherization Program (LIWP). This is a state program that provides low-income households with solar systems and energy efficiency upgrades at no cost.

Since CSD measure eligibility requirements for measure replacements are more flexible than the ESA programs, identifying projects have been limited. For instance, the ESA program replaces refrigerators that are 15 years or older. However, CSD's LIWP is able to replace refrigerators newer than 15 years old.

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

The ESA program does not have separate agreements with water agencies or companies. Instead, the ESA program leverages similar agreements with its CARE program. As the ESA program targets CARE customers, CARE-enrolled customers who have not enrolled in the ESA program are targeted in ESA's marketing efforts.

The CARE program has existing data sharing agreements with the following water utilities:

- California Water Association
- Liberty Utilities
- California Water Service

- Golden State Water
- Great Oaks Water
- San Gabriel Valley Water
- San Jose Water
- Suburban Water

1.6 Integration Success

In D. 08-11-031, the Commission defined integration as follows:
"Integration constitutes an organization's internal efforts among its various departments and programs to identify, develop, and enact cooperative relationships that increase the effectiveness of customer demand side management programs and resources. Integration should result in more economic efficiency and energy savings than would have occurred in the absence of integration efforts."[20]

1.6.1 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the California Alternate Rates for Energy (CARE) Program.

There were no new efforts to integrate and coordinate SCE's ESA and CARE programs, as SCE focused on ramping down its current ESA program offering in 2023. Instead, SCE focused on completing installations for enrollments completed in 2022.

1.6.2 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Residential Program.

Refer to ***Section 1.6.1***.

1.6.3 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Government Partnerships Program.

There were no activities to coordinate the ESA program with Energy Efficiency Government Partnerships Programs because these programs have been either closed or reduced. These programs are implemented through collaborations between SCE and local or regional governments or state agencies. Programs are usually building retrofits or promotion of various EE programs.
SCE will continue to look for opportunities to integrate the ESA program with EE Government Partnership Programs.

[20] *See* D. 08-11-031 at p. 116.

1.6.4 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with any additional Energy Efficiency Programs.

Refer to ***Section 1.6.1***.

1.6.5 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Demand Response programs, including successes in Air Conditioning Cycling or other Demand Response programs, including the new Summer Reliability programs from D.21-12-015.

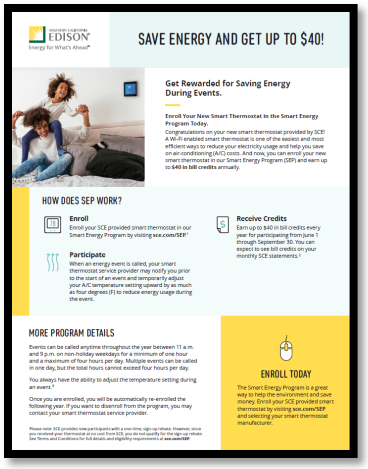
SCE continued to provide information related to DR programs such as the Smart Energy Program (SEP) and Summer Discount Plan (SDP) during the installation of HVAC replacements. When a customer's HVAC system is replaced by the ESA program, installation crews provide brochures for participation in the SEP and SDP and explain their respective benefits. Brochures were provided to 3688 customers.

ESA program administrators also continue to provide HVAC and Smart Thermostat installation data with SCE's DR team monthly; this data is used to (1) ensure that customers who were temporarily disconnected from SDP due to the installation of their replacement HVAC unit(s) are reconnected in a timely manner, and (2) ensure those customers who received free smart thermostats are not submitting rebate requests.

During 2022, there were 321 ESA HVAC installations performed for customers who were on the SDP Rate Plan. All 321 customers were referred to SDP for reconnections, of these 224 are still active, thirty-one were turned off (reason unknown), and sixty-six requested to discontinue participation.

Additionally, SDP had sixty-one new enrollees that enrolled in SDP within 120 days of their enrollment in the ESA program.

Additional information for both programs can be located on SCE's website at www.sce.com/sdp and www.sce.com/sep.



1.6.6 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the California Solar Initiative Programs.

The California Solar Initiative provides incentives for solar technologies in SCE's territory. GRID Alternatives implements California's SOMAH program, and they act as the administrator of the DAC-SASH program. SCE coordinated with GRID Alternatives by utilizing a monthly referral process to share ESA leads for future participation in SOMAH/DAC-SASH and received leads for future participation in the ESA program.

SCE invited GRID Alternatives to present at the ESA program workshop mentioned in ***Section 1.7.2*** below. Their presentation provided the ESA contractors information about the various programs GRID Alternatives implements and focused on ways contractors could leverage enrollment opportunities with ESA. GRID Alternatives discussed the qualification criteria for the programs as well as the customer journey participants encounter after enrolling in one of the programs mentioned above.

1.6.7 Provide the number of referrals to the Single Family and Multi-Family Affordable Solar Homes Program Administrator.

SCE continued to partner with GRID Alternatives for the DAC-SASH program and Center for Sustainable Energy for the SOMAH program. In 2022, SCE provided GRID Alternatives with 18 leads. For SOMAH, instead of providing leads, SCE was asked to send the referral form to property owners who participated in ESA MF CAM.

1.6.8 Report annually the number of referrals provided to other PAs for participation and the number of leads they successfully acted on by program type.

For annual report results, see ESA Table 14A (Clean Energy Referral, Leveraging, and Coordination) in the Appendix.

1.7 Workforce Education & Training

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

PY 2022 was a ramp down year for the ESA program as SCE began the transition from the existing delivery model to the new delivery model as outlined in D.21.06.015. During PY 2022 the ESA program successfully completed a series of RFPs to identify a new contractor network that will be in place and that will implement the new program design(s) in January 2023; included in the RFPs were instructions that the selected contractor would need to follow and implement as part of their hiring practice when looking to fill vacancies within their organization for PY 2023 and beyond. These requirements are identical to those outlined and ordered as part of Section 6.13.8.1 in D.21.06.015.

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

As stated in ***Section 1.7.1***, PY 2022 was a ramp down year and SCE's contractor network did not perform much hiring. In fact, as the ESA program ramped down, there was a reduction in workforce as contractors did not know if they would receive a winning bid in the RFPs that were taking place. Because of this, in connection with budgetary concerns for PY 2022, many contractors began shifting their primary focus to installation work activities.

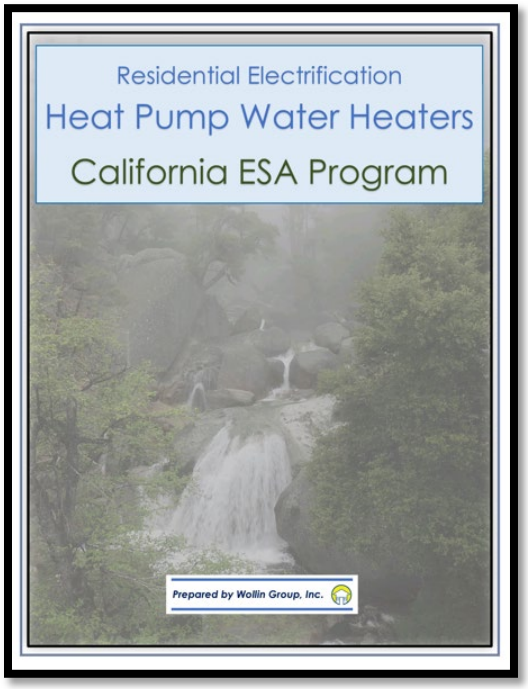
Throughout PY 2022, SCE sent out several emails to encourage the contractors to take advantage of the CBT Learning System, a free online computer-based training[21] that continued to be available before the system was decommissioned in December 2022; the decommissioning was in response to low usage of the system that no longer justified the cost expenditure.

Additionally, the ESA program administrators sent emails to the contractor network with information and links to the various training opportunities that were

[21] CBT Leaning System hosted by Custom Guide under license by both SCE and SoCalGas.

being offered at SCE's two Energy Education Centers (EECs) located in Tulare and Irwindale, CA.

In November 2022 in conjunction with TECH Clean California,[22] SCE hosted a Heat Pump Water Heater informational training session at the EEC in Tulare, CA. The training was facilitated by Gary Wollin of the Wollin Group, Inc., a subcontractor of TECH Clean California. This training was designed to give real-world training to contractors that were servicing (or potentially servicing) SCE customers in PY 2023 and beyond.



In December 2022, SCE conducted the 2023 ESA program workshop. This workshop was attended by the ESA Main program enrollment, installation and inspection contractors, equipment vendors, and other stakeholders that will be working in SCE's ESA program for the 2023 – 2026 program cycle. The goals of the three-day workshop were to:

- Get to know program partners and stakeholders;
- Review program basics;
- Coordinate program transition;
- Know program strategy;

22 TECH Clean California is a statewide initiative to accelerate the adoption of clean space and water heating technology across California homes in order to help California meet its goal of being carbon-neutral by 2045. See more at https://techcleanca.com/.

- Learn about program changes; and
- Raise and discuss any program concerns.

1.7.3 For the ESA Program - Provide the following metrics related to WE&T in support of Commission's effort to increase workforce opportunities for workers in disadvantaged areas.

- **Percent of incentive dollars spent on contracts with a demonstrated commitment to provide career pathways to disadvantaged workers.**

All activities in 2022 related to WE&T were hosted by SCE through its EECs. As stated in ***Section 1.7.1*** and ***Section 1.7.2*** above, 2022 was a ramp down year, and therefore, contractor activities were limited. Therefore, a percentage for incentive dollars spent is not available for 2022.
All contracts awarded for PY 23-26 included requirements that the awardees provide WE&T opportunities and seek to fill vacancies with those individuals who reside in a DAC or have participated in a Community Workforce Resources (CWR) program.

The ESA contracts for PY 23-26 include deliverables for contractors to track and maintain training records of their activities that support ESA workforce, education, and training objectives.

This may include:
- Hiring of local and disadvantaged workers;
- Training workers; and
- Career-ladder job development, where possible, as well as any new metrics to track these efforts.

- **Number of Community Workforce Resources (CWR) participants who have been employed for 12 months after receiving the training. (Provide contractors early warning of need for this information)**

CWR's are administered as a statewide program in which PG&E serves as the contract holder and lead IOU. Metrics are tracked collectively for the IOUs at the statewide level.

The results of the statewide activities for PY 2022 are as follows:

Metric	Q4 2022 Actuals	Q4 2022 Goal (31-Dec)	Goal through 2022
Training Partners	8	9	9
Training Projects	3	5	5
Disadvantaged Workers Participating in Training who increase EE Knowledge or Awareness		40%	40%
Individuals Recruited	768	684	684
Individuals Trained	141	570	570
Disadvantaged Workers Trained	205	380	380
Disadvantaged Workers Placed	173	140	140
Disadvantaged Workers who Retained their job placement for 1 year	0	0	0
Collaboration	5	18	18

- **Percent of total WE&T training program participants that meet the definition of disadvantaged worker.**

For PY 2022, SCE's two EECs located in both Irwindale and Tulare, CA provided 425 unique course offerings; the total attendance for PY 2022 was 23,865 total students.[23] ZIP code information was captured for some but not all of the courses.[24] Those participants who provided ZIP code information accounted for 3,232 students, and when scrubbed against CalEnviroScreen3.0[25] for disadvantaged communities, approximately 42.6% (1,377 students) were deemed as residing in a DAC, additionally these 1,377 participants on average attended 6 of the 425 courses offered.

[23] Count includes students that may have attended one or more of the available 425 courses.

[24] This deficiency has been corrected, for PY 2023 and beyond, ZIP code information will be captured for all participants.

[25] Scoring & Model | OEHHA (ca.gov).

1.8 Studies

1.8.1 For each Study, provide (1) a summary describing the activities undertaken in the study since its inception; (2) the study progress, problems encountered, ideas on solutions; and (3) the activities anticipated in the next quarter and the next year.

2022 Low Income Needs Assessment (LINA) Study

The fifth Low Income Needs Assessment (LINA) study was completed in December 2022. SCE was the contract manager on behalf of the four IOUs and the ED. By statute the ED directs and leads the LINA studies.[26] The overall objective of the 2022 LINA study was to understand the energy needs of low-income customers who rent their homes. Renters make up 68% of the low-income customer market, yet little is known about this market. The 2022 LINA study sought to learn more about the energy related needs of renters living in both single family and multifamily homes. This study built on key findings from prior research to address potential needs and participation barriers associated with the ESA program.

The objectives of the study included:

- Identify the size, key characteristics, and energy burdens of the low-income single-family and multifamily rental (and owner) markets;
- Identify market and program barriers to serving customers residing at different types of rental properties (e.g., single-family; large, medium, and small multifamily; deed-restricted; market rate);
- Identify the needs that the program is meeting and/or has met, as well as needs not met by the program, for relevant sub-groups based on housing type, location, energy usage, etc.;
- Identify and understand the needs of vulnerable populations within the rental market (e.g., households with seniors, children, disabled members); and
- Identify potential opportunities (including lack of needs/opportunities) and solutions for meeting renter energy needs based on usage, type of property, etc.

Planning for the 2022 LINA study commenced in January 2020, shortly following the completion of the 2019 LINA study. Planning activities included identifying key research topics for consideration, developing a scope of work, disseminating an RFP to a wide group of firms, selecting a bidder, and establishing the contract with the research consultant to conduct the study. While previous planning and public workshops for prior LINA studies followed a standard protocol for study development. In order to engage the Low-Income Oversight Board (LIOB) more fully, the decision was made to conduct public workshops as part of LIOB LINA

[26] AB327; PU code 382.

subcommittee meetings. The first discussion for the 2022 LINA study was conducted at the January 2020 subcommittee meeting. This meeting kicked off discussion of potential topics to explore in the upcoming LINA study. Following that meeting, two additional public workshops were conducted to solicit ideas and input from the LIOB and the public. The initial workshop was conducted at the April 2020 LIOB LINA subcommittee meeting. This workshop included discussion of initial topic ideas and an open forum for gathering additional ideas for potential study. The second pre-contract workshop was conducted as part of the July 2020 LIOB subcommittee meeting. This workshop provided additional details on a proposed work scope, study timeline, expectations as well as solicited input from the LIOB and the public. The RFP was released in August 2020. A bidders' conference was held at the end of August 2020. Bidders were encouraged to attend and ask questions about the RFP and expectations of the study. The proposals were due in mid-September 2020.

Evergreen Economics was selected as the winning bidder in October 2020. The contract was finalized in December 2020. A study kick-off meeting was held in January 2021. In early March 2021, Evergreen Economics presented its detailed draft research plan and solicited public input during a public workshop conducted as part of the LIOB LINA subcommittee meeting.

Between March and July 2021, the IOUs provided data, Evergreen Economics reviewed and collated data, Evergreen Economics began initial analysis of secondary data including 2019 Census data, 2019 Athens Research Annual Income Eligibility Estimates, and data from the 2019 and 2009 Residential Appliance Saturation Surveys (RASS).[27] These datasets provided population level information and allowed for some comparisons between low-income renters and owners. Additional qualitative and quantitative data were collected between July 2021 and January 2022. This included a large-scale phone/email survey with renters stratified by type of home (single family, small multifamily, and large multifamily). The survey provided a broad understanding of specific needs and differences in needs based on housing type and program opportunities. One-on-one interviews were conducted with a sub-sample of survey respondents to gather additional information. This activity provided additional details and explanations of energy needs among the sub-population of renters. Further, informal surveys with a small number of ESA contractors were completed to obtain their perspectives on barriers associated with property owners of rental properties.

Evergreen Economics presented draft results at a public workshop during mid-October 2022 with the goal to solicit input from stakeholders prior to finalizing the report. Public comments were addressed, and responses published on the

[27] 2019 Residential Appliance Saturation Study (ca.gov).

CPUC's public documents area (PDA). The final report was published in December 2022.[28]

Overall, the study found

- In California more than 2/3 of the low-income population are renters.
- Among the low-income rental population, those who rent single family homes comprise more than half of the renters in California.
- Renters have relatively lower energy burden (4.5%) when compared to low-income customers who own their homes (6.7%).

Relative to customers renting homes in multifamily residences, those renting single family properties have greater energy burden, including higher bills, and more energy usage, more space and energy related opportunities, and relatively more interest in the ESA program.

More than 75% of the customers renting multifamily residences have relatively low energy burden (less than 3.9%).[29] As such the evaluator recommends the program focus attention on addressing the energy needs of low-income customers residing in single family homes.

The study also found that 52% of the renters are not interested in participating in the ESA program. The primary reasons for lack of interest are that they already have energy efficient appliances, relatively small bills and are already as efficient as they can be. The least interested renters are those residing in large multifamily properties because relative to other renters, they tend to have the smallest spaces, fewer needs, lower energy bills, and more potential barriers with their landlords. The research also identified some regional differences in terms of interest and needs among the renters and recommended targeting marketing associated with different needs in different regions of the state.

There were no significant problems or issues with the study.

Multifamily Common Area Measure Process Evaluation

The MF CAM initiative was instituted in 2017 via D.17-12-009. PG&E led a statewide process evaluation of the ESA CAM initiative with Resource Innovations Inc. (formerly Nexant) as the evaluator. The study involved the installation of "common area" or whole building measure in select deed-restricted MF properties with deeper energy savings beyond achievable by measures

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[28] 2022 Low Income Needs Assessment (LINA) Study - Final Report and Appendices. Evergreen Economics, December 2022. CALMAC Study ID: SCE0469.01, available at https://www.calmac.org/publications/2022_LINA_Report_120922_FINAL.pdf.

[29] Energy Burden refers to the ratio of a customer's energy bills in relation to the household's income.

installed in low-income customers' dwelling. The IOUs adopted different program designs and approaches to meeting this requirement.

The MF CAM Process Evaluation was primarily designed to examine the initiative's designs and processes to identify best practices that may be employed moving forward. The objectives of the study included: (1) assessment of the relative effectiveness of the IOUs' MF CAM outreach, delivery, and implementation strategies; (2) identification of the existing data and other data needed to facilitate reliable evaluations of program impacts; and (3) comparisons between IOUs and recommendations for future program designs targeting the income-qualified multi-family sector.

The planning activities for the evaluation of the MF CAM initiative commenced in August 2020 with initial planning and work scope development. PG&E was contract manager on behalf of the four IOUs for the MF CAM statewide process evaluation. The RFP was distributed in May 2021. Proposals were due in June 2021.

Resource Innovations (RI) was the evaluation consultant selected to conduct the research. The kick-off meeting was conducted in July 2021. The consultant presented its detailed draft research plan at a public workshop at the end of July 2020. The workshop was intended to be a forum for stakeholders and the public to comment on and provide feedback on the draft plan. Following the approval of the final research plan information was gathered to address the objectives. The data collection activities included a review of program materials review and in-depth interviews with the IOUs, program implementers, single point of contacts, and the ED staff. Additional data were collected via surveys and interviews with participant property owners and managers. Online surveys with tenants in selected treated properties were conducted via online surveys. A second public workshop took place in January 2022. This workshop involved presenting interim results to gather input and feedback on the project. The study's draft results were presented in September 2022 in a public webinar, again to invite stakeholders to provide input, comments, and suggestions on the draft report. The final report was completed and posted in October 2022.[30]

Overall, the study found differences in various processes across the IOUs that reflected their different program designs. For example, while PG&E allowed property managers to choose their own installation contractors, the other IOUs drew from a list of approved contractors to provide installation services. There were pros and cons of these approaches. For example, while PG&E's program participants had more flexibility and control in choosing a contractor, they also were often overwhelmed and found the process of selecting a contractor daunting. Unfortunately, for SCE the lack of up-to-date contact information on program participants and tenants hampered RI's initial plan to survey these groups. As

30 CPUC Energy Evaluation Public Comment (energydataweb.com).

such participant and tenant experiences were largely based on PG&E's participants and to some extent those who received services at SDG&E. Participants reported that the opportunity to receive no-cost energy-efficient upgrades and the potential energy and bill savings persuaded them to participate in the initiative. Among those interviewed or surveyed, participants found eligibility rules somewhat difficult to understand and various processes including enrollment, payment project closure to be somewhat time consuming. RI recommended streamlining some of these processes by reducing paperwork and documentation, to the extent possible, as well as providing examples of completed forms as easy to follow reference documents. Roughly 50% of the tenants[31] of the properties treated were aware the properties had received the measures. Among those who were aware, they generally received communication from their property management or visibly noticed the modifications. Tenants reported limited benefits and, in many cases, pointed to potential negative benefits from the initiative. These included increased rent, higher energy bills, or a temporary disruption in their water supply.

Among the key recommendations provided include the following:

- Standardize program tracking and data collection across IOUs;
- Review and assess potential for new measures;
- Consider the benefits of doing a market characterization prior to outlining a strategy in order to better target and serve the wide range of multifamily properties;
- Develop outreach strategy that engages renters and property owners simultaneously and communicates to renters that the program will work with the landlord on their behalf;
- Modify program outreach messaging to leverage specific needs of sub-population findings—including regional needs and/or population specific needs for renter households with seniors, disabled residents, or a larger number of residents;
- Improve and coordinate data collection and tracking, particularly on building characteristics and other site characteristics as well as maintaining up to date contact information on participants and tenants; and
- Conduct a more rigorous assessment of tenant impacts and potential tenant benefits. Study results are expected to assist MFWB implementers in their efforts to serve the property owners and tenants of multifamily properties.

The primary issue with the study was the limitations of the available data. Accurate, consistent, and up-to-date contact information on program participants and tenants in the properties treated was not available, which made it difficult to obtain information and perspectives from program participants and tenant, particularly for SCE and SoCalGas. These data limitations impacted what the

[31] Data reflects the experiences of PG&E customers. Other IOUs did not have sufficient number of tenant responses to analyze.

consultant was able to analyze. The consultant made recommendations regarding collecting better and more systematic data in the future.

Categorical Eligibility Study

The primary goal of the Categorical Eligibility Study is to review and assess means-tested public assistance programs that could serve as a way to qualify households categorically for the three utility programs for low-income households, specifically ESA, CARE, and FERA. Planning activities for the Categorical Eligibility Study began in early 2022. The work scope was developed, and the RFP was released in February 2022. SDG&E, on behalf of the IOUs, contracted with Evergreen Economics in June 2022.

The objectives of this study include the following:

(1) Determine the degree of alignment of eligibility requirements of existing categorical eligibility programs with those of the low-income energy assistance programs (ESA, CARE, and FERA);

(2) Identify other means-tested programs that could serve to ensure categorical eligibility;

(3) Recommend practical criteria for selection of programs to be used to provide categorical eligibility and recommend, which programs should provide categorical eligibility going forward; and

(4) Inform potential future auto-enrollment of participants from recommended categorical eligibility programs directly in CARE and FERA by assessing the suitability of auto-enrollment for recommended categorical programs and the steps required to establish auto-enrollment.

A project initiation meeting with members of the ESA/CARE Study Working Group[32] resulted in a draft research plan presented during a public webinar in August 2022. During the subsequent months, Evergreen Economics began researching 17 public assistance programs and conducted telephone interviews with representatives of these assistance programs to collect information on their eligibility requirements and application processes. Responses from these interviews were entered into an informational database that were used during the analysis phase of the study. An interim results memorandum describing the analysis process and results was provided at the end of October 2022 and shared with the ESA/CARE Study Working Group for discussion and feedback.

[32] The ESA/CARE Study Working Group includes IOUs, ED, CBOs, the California Public Advocates Office (Cal Advocates) and other special interest groups. The working group meets on a quarterly or as-needed basis. The group provides input on study work scopes, budgets, timelines, and results and reporting deliverables.

An additional task in the study to be completed in 2023 involves assessing the feasibility of automatic enrollment for CARE and FERA with categorical programs. Following the completion of that task, a draft report will be presented during a public workshop and then finalized. The study is expected to be completed prior to June 2023.

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

ESA Program Evaluations				
Study	**Evaluation Consultant**	**Contracting IOU**	**Authorized Budget[33]**	**Budget Spent**
2022 Low Income Needs Assessment	Evergreen Economics	SCE	$ 75,000[34]	$ 74,900
Multifamily Process Evaluation	Research Innovations	PG&E	$ 90,000[35]	**$** 80,722.2
Categorical Program Assessment	Evergreen Economics	SDG&E	$ 15,000[36]	**In process**

See ***Section 1.8.1*** above for an overview of the studies, as well as results and recommendations provided in completed studies.

1.9 Pilots

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

ESA Building Electrification (BE) Pilot

The BE Pilot, an SCE-only pilot, will provide income-qualified customers living in single family homes located in DACs with an opportunity to receive

[33] Budgets reflect study budgets; not annual budgets.

[34] SCE's portion of a statewide study. Study budget is split between CARE and ESA programs.

[35] SCE's portion of a statewide study.

[36] SCE's portion of a statewide study. This constitutes one-third of SCE's approved budget. The study expenses are split between the ESA, CARE, and FERA programs.

electrification offerings. The BE Pilot will offer heat pump equipment for space and water heating, and other electric options for cooking and clothes drying, including upgrading electrical panels when necessary.

In August 2022, SCE selected Maroma Energy Services (Maroma) as the implementer for the BE Pilot. SCE and the implementer began to collaborate on work plans to launch the BE Pilot in Quarter 1 of 2023. SCE plans to develop a target list of customers based on data analysis of CARE customers with high usage and high cooling loads. The list will be used by the implementer to perform outreach for the BE Pilot.

BE Pilot Evaluation

The solicitation for the evaluation for the BE Pilot launched in March 2022. Proposals were received in April 2022. In September 2022, Illume Advising was onboarded to conduct the evaluation. The evaluation is scoped in two phases as it will follow the BE Pilot implementation. The initial phase involves setting up the evaluation data collection protocols and developing a plan to evaluate the BE Pilot. During 2022, the evaluator worked primarily on the refining and creating a detailed work plan as well as collaborating with the implementer to ensure sufficient and accurate data are collected to evaluate the BE Pilot. In addition, steps were taken to identify a strategy to collect gas data which is a key piece of the piece of the evaluation and not usage data SCE can provide.

During 2023, the evaluator will continue to refine data collection protocols and review early data collected on the initial installations. An interim progress report is expected to be provided in December 2023. The second phase involves the collection and analysis, and reporting of the data. This phase is expected to commence in 2025 following the treatment of a sufficient number of homes.

ESA Clean Energy Homes (CEH) Pilot

The Clean Energy Homes (CEH) Pilot will provide incentives to low-income housing developers to incorporate innovative low-carbon technologies and building practices in the designs of residential new construction buildings that will reduce energy bills for tenants. The CEH Pilot supports the state's ambitious GHG reduction goals and strives to bring environmental equity to vulnerable customers. SCE is finalizing the contract for Association for Energy Affordability to implement CEH. The pilot is expected to be open to participation in the second quarter of 2023.

Clean Energy Homes (CEH) Pilot Evaluation

The solicitation for the evaluation for the CEH Pilot launched in March 2022. Proposals were received in April 2022. In November 2022, APEX Analytics was selected as the evaluation contractor. The evaluation is scoped in two phases as it will follow the CEH Pilot implementation. The initial phase involves setting up the evaluation data collection protocols and developing a plan to evaluate the

CEH Pilot. During 2022, the evaluator worked primarily on refining the detailed work plan.

During 2023 the evaluator will work more closely with the implementer and continue to refine data collection protocols and review early data collected on the various rebates of interest. This second phase of the evaluation is expected to commence in 2025 following sufficient participation.

ESA Whole Home

In D.21-06-015, the Commission approved the ED's ESA program redesign concept on a pilot basis, which is being implemented as ESA Whole Home.[37] SCE and SoCalGas decided to design and implement the pilot collectively in their respective overlapping service territories—to provide customers with comprehensive electric and gas energy efficiency services to maximize energy savings, provide for a customer-focused service delivery, and leverage each respective utility's program resources to increase program effectiveness and minimize duplication. The Joint-Pilot budget for PY 2021-2026 is $51,977,044, with a goal of treating approximately 2,200 homes. On November 22, 2021, Advice Letter 4650-E was filed detailing the IOUs proposed program implementation plan.

ESA Whole Home is designed in accordance with the following guiding principles:

1. Deeper Energy Savings

   Use of a test-in, test-out strategy to determine energy saving potential and pilot path. Thus, to predict energy savings, all homes to be enrolled will go through a more in-depth and robust home assessment, utilizing a software package known as SnuggPro. The assessment will then be used to determine and recommend which measure(s) would be best suited for the home, how much energy they are projected to save, and thus which pilot path (Plus or Deep), will be followed.

   Homes participating in the plus package path will utilize deemed savings whereas the deep package will use calculated savings and have another "final" evaluation/assessment completed to verify that the home met the "targeted savings" that the initial assessment projected, forecasted/recommended.

   a. Achieve between an estimated 5 percent and 15 percent savings through the Pilot Plus measure package
   b. Achieve between an estimated 15 percent and 50 percent savings through the Pilot Deep measure package.

[37] During November 2022, the statewide IOUs met collectively and reached a consensus to name the pilot "ESA Whole Home" for all customer-facing communications.

2. Equity

   While the focus of the program may be toward single-family, owner-occupied homes, ESA Whole Home will endeavor to increase program participation opportunities to renters, and program administrators will consider whether landlord co-investment is reasonable, given the rent restrictions and landlord co-pays for the multifamily whole building programs.

3. Quality

   ESA Whole Home will focus on capturing meaningful, deeper savings for low-income households. This means spending more on fewer households, and dramatically increasing the impact of the treatment.

4. Customer-centric

   The pilot is designed to create a seamless low-income program delivery for the recipient with as many services provided in as few visits as possible, and greater customer satisfaction.

5. Optimization

   ESA Whole Home is designed to reduce in program administration, duplicative costs, and burdens to ratepayers—as well as maximize total funding to go towards program measures that save energy and/or reduce ratepayer collection.

In July 2022, Maroma Energy Services was awarded as the successful bidder for third-party implementation of ESA Whole Home. Maroma will be responsible for the day-to-day implementation of the pilot to ensure that the Program Implementation Plan (PIP)[38] laid out by both SCE and SoCalGas is initiated and carried out. Both SCE and SoCalGas have dedicated program managers available to Maroma to assist their efforts and address any questions that should arise. In late September 2022, after contract negotiations and other requirements were successfully completed and agreed to, the contract was officially signed and work commenced.

On December 20, 2022, Maroma commenced contacting its initial list of eligible customers. Behind the scenes work also commenced with the goal of initial customer enrollments and installation to begin in Quarter 1 of 2023.

[38] Advice Letter (AL) 4650-E issued on November 22, 2021.

ESA Whole Home Evaluation

In July 2022, Illume Advising was awarded as the successful bidder of the evaluation aspect of ESA Whole Home. Illume Advising will be performing analytics for the pilot and completing surveys, interviews, etc., to gauge the successfulness of the pilot. Additionally, Illume Advising, in conjunction with the IOUs, will be performing annual reviews of approximately 15,000 potentially eligible customer population to identify balanced cohorts which best meet the eligibility requirements.

Upon completion of the ESA Whole Home pilot, information from both the implementation and evaluation will be forwarded to the ED to be reviewed and compared with the results of SDG&E and PG&E's implementation of their respective pilots. This information will then be utilized to help inform and determine the future strategy of the ESA program.

1.9.2 If applicable, submit Final Pilot Report describing: (1) Overview of pilot; (2) Description of Pilot Evaluation Plan (PEP); (3) Budget spent vs. authorized budget; (4) Final results of pilot (including effectiveness of the program, increased customer enrollments or enhanced program energy savings); and (5) Recommendations.

Since the pilots are still ongoing and will not conclude until PY 2026, a final pilot report is not applicable for PY 2022.

1.10 ESA Working Group (WG) and Sub-Working Groups (SWG)

1.10.1 Please provide a brief background on each WG and SWG.

ESA Working Group

D.21-06-015 established the mandate for implementing the ESA Working Group (ESA WG) with a list of required tasks and actions. In addition, the Decision provided the following guidance for this implementation:[39]

- The group's role would include all mid-cycle issues, energy education, multifamily, and the Universal Application System (UAS);
- Membership would include IOU representatives, the ED staff, and no more than two representatives from the following stakeholders: "contractors, CBOs, Cal Advocates, consumer protection/advocates, and other special interest groups";
- Representatives (1) need expertise in the issues relating to the ESA WG's purpose, and (2) are expected to contribute significantly to the group's work;

[39] D. 21-06-015, p. 413.

- Group members may be interchanged based on the subject matter and level of expertise, as long as the number of representatives from each party/segment remains static; and
- ESA WG should consider the CAEECC rules and processes and begin meeting at least once a quarter, starting no later than the beginning of 2022.

Cost Effectiveness Sub-Working Group

The Cost Effectiveness Sub-Working Group (CE SWG) is made up of representatives from the IOUs, the ED, the Cal Advocates, Richard Heath and Associates, Reliable Energy, and Quality Conservation Services. Selected ESA WG Members supported the CE SWG to ensure project consistency and continuity. This CE SWG requested the ESA WG delegate the cost effectiveness technical tasks to the CE SWG for analysis and resolution. Selected ESA WG members supported the CE SWG to ensure project consistency and continuity. The scope of the CE SWG is to fulfill the following ordering paragraphs from D.21-06-015:

OP-85. "The Energy Savings Assistance Working Group must provide recommendations on cost-effectiveness test considerations via a progress report to be distributed to the service list of this proceeding or a successor proceeding no later than the end of the first quarter of 2023."

OP-86. "The Energy Savings Assistance Working Group must provide recommendations on the Non-Energy Benefits (NEBs) study and stakeholder process via a progress report to be distributed to the service list of this proceeding or a successor proceeding no later than December 31, 2022."

Policies, Procedures & Installation Standards Sub-Working Group (PP&IS SWG)

The scope of the Policies, Procedures & Installation Standards Sub-Working Group (PP&IS SWG) is to incorporate timely updates to the PP&IS manuals to support program implementation. This SWG is comprised of representatives from each IOU and from Richard Heath & Associates. See 2022 accomplishments section for more information.

Universal Application System Sub Working Group (UAS SWG)

D.21-06-015 required the establishment of a short-term working group consisting of the statewide IOUs and other interested parties such as intervenors as contractors to both review and complete a list of tasks for the development of a report to provide insight into the feasibility, practicality, and potential development of a Universal Application System for low-income programs

CARE/FERA Post Enrollment Verification Sub-Working Group (PEV SWG)

In December 2022, D.22-12-029 mandated the ESA WG to establish a sub-working group related to income verification procedures and policies.[40] D.21-06-015 provides latitude for the ED to "periodically update the scope of the Working Group's role"[41] where one of the guiding principles of the ESA WG is to "resolve disagreements among stakeholders whenever possible to reduce the number of matters that need to be litigated before the Commission."[42]

The scope of the CARE/FERA Post Enrollment Verification Sub-Working Group (PEV SWG) will include the following:

- Develop recommendations that could be implemented in the current program cycle to create a more efficient, transparent, or less burdensome recertification and income verification process within the rules according to D.21-06-015;
- Develop recommendations that could be proposed in the next program application cycle that will create more efficient, transparent, or less burdensome recertification and income verification processes while balancing the need to verify eligibility and protect the integrity of the program;
- Develop recommendations for additional reporting requirements in either IOU monthly, or annual CARE/FERA reports to include data on arrearage and disconnection rates for customers removed from CARE/FERA due to non-response during recertification or PEV compared to other classes of customers (CARE-enrolled, non-CARE enrolled, etc.); and
- Explore the CalFresh Confirm Hub tool and other data-sharing partnerships to verify customer income eligibility before requesting recertifications and PEV.

ESA/CARE STATEWIDE STUDY WORKING GROUP

This working group includes members from the ED, Cal Advocates, contractors, Evaluation, Measurement and Verification (EM&V) representatives from the four IOUs, and other consumer protection advocates.[43] The tasks of the group include the following:

- Assign a "lead IOU" for each study if not already assigned by this decision;[44]

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40 D.22-12-029, p. 15 (footnote omitted).

41 D.22-12-015, p. 414.

42 D.22-12-015, p. 415.

43 D.21-06-015, p. 410.

44 D.21-06-015, p. 411 ("The expectations of a 'lead IOU' for an ESA/CARE study is to, among other duties, lead the development of scope, budgets and project timelines, facilitate contracting with any consultants needed to conduct the study, and act as the main point of contact for the study.").

- Develop and provide feedback on proposed scopes, budgets, timelines, and statements of work, and other study scoping documents before finalized for study execution;
- Participate in project kick-offs and attend project check-in meetings as needed;
- Provide feedback on project milestones and draft study results as requested by lead IOU in a timely manner; and
- Ensure that IOU(s) present final drafts of non-statutory required studies or evaluations to the ESA/CARE Statewide Study Working Group for their review and input prior to their completion. All final evaluations and/or studies must be served to the relevant efficiency list serve by the IOU(s) within 14 days of their completion. The ED shall be consulted to determine the need for a webinar, or similar, to present and review studies and evaluations with the public. If confirmed, all public presentations shall be noticed by the IOU(s) at least 10 days in advance to the relevant efficiency list serve.

1.10.2 What were the accomplishments of each WG and SWG in the 2022 PY?

ESA Working Group Accomplishments

In 2022, the IOUs responded to D.21-06-015 by organizing the ESA WG into various functions: an ESA WG Council and into three Sub-Working Groups (SWGs). In December 2022, per Decision 22-12-029, an additional CARE/FERA PEV SWG was added.

The ESA WG Council consists of a small number of representatives from the larger ESA WG membership. The ESA WG Council acts as the leadership group that performs the following functions:

- Oversees agenda planning for the ESA WG and SWGs,
- Addresses cross-cutting program concerns beyond the ESA program,
- Coordinates activity with ESA/CARE Study Group, and
- Manages the Response-to-Recommendation (RTR) process, and
- Manages the Facilitation Team.

Under the ESA WG, four sub-working group are as follows:

- Cost-Effectiveness (CE) SWG,
- Policy and Procedures (PP) and Installation Standards (IS) Manual SWG,
- Universal Application System (UAS) SWG, and
- CARE/FERA Post Enrollment Verification (PEV) SWG.

To improve communication within the ESA WG and its sub-working groups, a Basecamp system was implemented for all members to post discussions and coordinate interim work products. Basecamp is an online collaboration app that lets the facilitators manage work and communicate between the WG/SWG members. In addition, all non-public working session meeting notes, actions, and interim deliverables are posted to the members-only Basecamp. ESA WG and its sub-working groups' draft deliverables are posted to the CPUC public site to collect public feedback. The final deliverables are posted to the CPUC public site to support transparency.

While the ESA WG strives to encourage consensus on all topics, when consensus is not possible, the ESA WG will move forward with the majority while documenting the disagreements. These disagreements and open items are tracked by the facilitators to maintain a record of concerns and/or type of disagreements that came up in the discussion. In addition, all ESA WG meeting material, notes, actions, and reports are posted to the CPUC public site for public access (https://pda.energydataweb.com, search for "ESA WG").

2022 CE SWG Accomplishments

During 2022, the group, led by SDG&E, regularly met to discuss and provide different perspectives on how to approach the issues identified for each of the two tasks identified in OP 85 and OP 86 of D.21-06-015. The requirements of this sub-working group were operationalized into two distinct tasks summarized in the lists below.

Task 1: Cost-Effectiveness Test Considerations (OP 85)

The objective of Task 1 is to provide recommendations on the issues listed below:

1. How should the IOUs use the CE guidelines in this Decision to inform ESA program design?
2. Are there any recommendations around how the CE guidelines in this Decision should be changed?
3. Are there any recommendations on how the IOUs could better use CE tools to make program design decisions while meeting the other goals in this Decision?
4. How can the Resource Test continue to benefit ESA program decision-making and program design? Should the Resource Test be continued or discontinued?
5. Can the Societal Cost Test be used as another CE assessment for the ESA program? Are the pros and cons of using this test for ESA?
6. Should societal NEBs be included in ESACET? If yes, which ones? How would including societal NEBs interact with societal impacts already considered in the CET's Total Resource Cost and Societal Cost Test?

Task 2: Non-Energy Benefits (NEBs) Study and Stakeholder Process (OP 86)

The objective of Task 2 is to provide recommendations to facilitate the NEBs study planning process:

1. What research areas, including specific NEBs, should be considered a priority for the NEBs research study budget approved in this decision?
2. What is a reasonable timeline for conducting the NEBs study?
3. Who will be involved in the NEBs study team?
4. How will the results be used for ESACET updates?
5. When would these updated ESACET results be calculated?
6. How will stakeholders be kept involved during the NEBs study?

Beyond the NEBs research funded by this Decision, what should the process be for the IOUs to consider and incorporate new NEBs research, either from the Commission or other secondary sources, into the NEBs model on an ongoing basis?

In 2022 the CE SWG regularly met and began drafting a progress report for Task 1, due in 2023.

The group also regularly met and discussed Task 2 during 2022. The working group provided a progress report on task 2 to the service list in December 2022. The progress report included various recommendations. The progress report *is available* at: https://pda.energydataweb.com (search for "ESA WG & CE SWG Final Progress Report for Task 2").

2022 PP&IS SWG Accomplishments

In 2022, this working group completed the following tasks:

- The Statewide ESA Program 2021-2026 Cycle PP Manual update and the Summary of Statewide ESA Program Policy & Procedures Change documentation.
- The final version of the ESAP IS Manual (Version 1.1), including HBM requirements and the Summary of Statewide ESA Program Installation Standards Change documentation.
- The Final ESA Main Program Measure Offering Modification Protocol.

2022 UAS SWG Accomplishments

This SWG successfully filed the UAS Report by July 1, 2022. By year-end 2022, the UAS SWG delegated its charter back to the ESA WG Council to terminate its

charter. If needed, the ESA WG Council can reconstitute the UAS SWG with an updated charter.

2022 ESA/CARE Statewide Study WG Accomplishments

During 2022, the group met three times and discussed initiating the following studies identified in the Decision: Categorical Eligibility Study, Clean Energy Homes (CEH) Pilot Evaluation, and the Non-Energy Benefits (NEBs) Study. Members provided input and feedback on the budgets, work scope and timelines of the studies anticipated to be initiated in 2022.

1.10.3 What are some of the goals for each WG and SWG in PY 2023?

2023 ESA WG Goals

For 2023, the ESA WG updated its membership roster to include eleven non-IOU members, updated co-chairs, and updated ESA WG Council members. A few non-IOU members are dedicated to the CARE/FERA PEV SWG only, but most non-IOU members will continue to support a minimum of two SWGs to ensure consistency and continuity with ESA WG actions. In addition, an update to the Conflict-of-Interest statement is underway.

In 2023, the ESA WG will host eight public meetings, one dedicated to discussing CARE/FERA PEV SWG's recommendations. These studies are concluded with recommendations from the consultants on changes that may be done for the program. The IOUs review these recommendations against the program design or operations and make changes when feasible or reasonable. This is referred to as the Response-to-Recommendations (RTR).

Therefore, the ESA WG public meetings will expand to cover the IOU's RTR provided by consultants in each of the published low-income studies. The IOUs are expected to address the extent to which they will implement the recommendations as part of subsequent ongoing program implementation and operation modifications.

2023 CE SWG Goals

The working group is expected to complete the progress report for Task 1 by the end of March 2023. Following completion of the progress report the IOUs will submit a joint Tier 1 Advice Letter informing the Commission of the necessary steps to begin the NEBs study and how the recommendations from Task 2 of the CE SWG will be incorporated. Afterward, the CE SWG may delegate its scope and charter back to the ESA WG to wind down this SWG in 2023. Later, the ESA WG Council will have the option to reconstitute another CE SWG as needed.

2023 PP&IS SWG Goals

Starting in 2023, the PP&IS SWG is working on the following tasks:

- Develop Multifamily Whole Building PP documentation;
- Develop standards for new ESA-Main program measures modifications;
- Continue to update a series of ESA program Policies & Procedures Manual Attachments to maintain consistency between PP and IS manuals;
- Address miscellaneous ESA-Main and ESA-MFWB technical, measure, and installation issues; and
- Participate in the IOUs' Mid-Cycle Reporting development and filing.

2023 UAS Project & ESA WG Goals

On January 26, 2023, CPUC issued a ruling requesting additional UAS information and actions. As a result, the UAS project scope is amended to address the implementation of Senate Bill (SB) 1208 and the potential funding needs relating to the implementation of the concurrent application process system (CAS):

a) What entities are necessary to implement the requirements of SB1208?
b) How much funding should be authorized for the design and development of the CAS and other implementation needs related to compliance with SB 1208?
c) How should the CAS and other implementation costs related to compliance with SB 1208 be funded, tracked, and recovered?
d) What other features of the CAS, if any, should be considered?

In addition, the CPUC ruling authorized the following actions:

- PG&E to be the lead IOU for this effort.
- Since the 2022 UAS Report recommended issuing a Request for Information (RFI) as the next step, PG&E will lead this effort.
- PG&E shall serve as the fiscal sponsor responsible for delivering the CAS to meet SB1208 requirements.

Since UAS is within the ESA WG charter and scope, the ESA WG will continue to monitor and track the UAS project progress as an ESA WG meeting item.

2023 CARE/FERA PEV SWG Goals

The following is a list of required actions for the CARE/FERA PEV SWG:

- Form a CARE/FERA PEV SWG and meet specified milestones and deadlines in D.12-22-029, consistent with the ESA WG structure and governance;

- The CARE/FERA PEV SWG plans to hold a public meeting in August 2023 to discuss its recommendations and to seek public input; and
- Subsequently, the CARE/FERA PEV SWG will incorporate its recommendations into the IOUs Mid-Cycle Report.

2023 ESA/CARE Statewide Study WG Goals

During 2023, it is anticipated the ESA/CARE Statewide Study WG will discuss both the progress and milestones of the studies initiated in 2022 as well as the studies identified to commence during 2023, which includes a NEBs study and possibly a Multifamily Whole Building Process Evaluation.

1.11 Annual Public Meeting of ESA and CARE Program Prior Year Results

The Annual Public Meeting for PY 2021 was held virtually on July 28, 2022. It was conducted jointly by SCE, PG&E, SDG&E, and SoCalGas. See Appendix B.

1.12 Multifamily Properties

1.12.1 The IOUs shall conduct and report an annual analysis of the square footage, energy consumption, ESA Program participation, Please include the breakdown of market rate and deed restricted properties treated.

D.17-12-009 approved ESA program unspent funds to treat common areas of deed-restricted multifamily (MF) properties where 65% of the tenants are income-eligible for ESA. A deed-restricted property has a written mechanism in place to preserve the long-term affordability of the units. In 2019, SCE completed an analysis of all non-deed-restricted MF properties within its service territory. The primary objective of this analysis was to assess the potential energy savings in non-deed restricted MF properties with a high percentage[45] of low-income tenants and to determine if the ESA program should expand its provision of common area measures to support these MF properties in the future. SCE's analysis included identifying all MF properties within the service territory and benchmarking energy consumption. This approach allowed SCE to conduct a comparison among non-deed restricted properties (and deed-restricted properties, which are out of scope), utilizing a common set of data. The analysis used account and parcel data to calculate the energy use intensity (EUI) of kilowatt-hour (kWh) consumption per square foot and the benchmarking scores for each MF property.

[45] The definition of an MF property with a high percentage of low-Income residents is: A property with at least 80% of households at or below 200% FPG (*see* D.21-06-015, p. 319).

Table 1.12.1 Energy Use Intensity for Non-Deed-Restricted Properties

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

The 2019 analysis identified 76 non-deed-restricted properties[46] in areas where at least 65% of the estimated population were at or below 200% FPG. These properties were identified by overlaying the current Athens Research data. The properties were found to have an average of 17,600 square feet and a total 2018 annual consumption of 440,000 kWh, of which 48,800 kWh was attributed to common areas and 391,345 kWh was attributed to residential units (kWh numbers are approximate).

SCE focused efforts on treating deed-restricted properties and did not treat non-deed restricted properties with common area measures during 2022. As such the data was not updated during 2022. However, SCE plans to refresh the data in 2023 to facilitate future efforts expected via the MF Whole Building treatments moving forward.

1.12.2 The IOUs shall describe the activities conducted in multifamily properties for multifamily common area measures under the ESA Program.

SCE continued providing CAM services to multifamily properties in 2022. By year end, SCE provided common area services to 44 deed-restricted multifamily properties, benefiting approximately 4,000 tenants, providing health, safety, and comfort measures throughout the common areas. SCE exhausted 100% of the $1.8 million authorized for MF CAM. As part of these efforts, SCE completed comprehensive lighting projects for multiple properties, including senior housing and those owned by local housing authorities. Other measures installed include parking lot lights, interior and outdoor LED fixtures, and exit signs—all of which contributed to a reported savings of 1,385,607 kWh. Once SCE exhausted all CAM funding, properties interested in participating in MF CAM were waitlisted.

Throughout 2022, SCE participated in the development of the Southern Multifamily Whole Building Program. The CPUC directed the Southern Investor-Owned Utilities, SCE, SoCalGas, and SDG&E to develop the MFWB program,

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

designating SDG&E as the lead utility. The Southern MFWB program includes both common areas measures and in-unit measures. As directed by the CPUC, a third-party implementer will provide services on behalf of the three Southern utilities: SCE, SoCalGas, and SDG&E. The Southern MFWB program was expected to launch in January of 2023; however, because the launch date was delayed until July of 2023, SCE extended contracts and increased funding in preparation of continuing MF CAM, treating multifamily units and enrolling waitlisted properties in 2023.

1.12.3 Normalized Metered Energy Consumption Analysis of Multi-family Properties

As per D.16-11-002[47] and D.17-12-009[48], current CAM annual reports are expected to include normalized energy use and savings. Given the limitations of the Normalized Metered Energy Consumption (NMEC) methodology to analyze savings assessments specific to SCE's MF common area measures,[49] after discussing the alternatives with the ED, and upon the recommendations of a study that SCE had commissioned to determine the feasibility of NMEC for use in SCE's programs as a viable means of determining savings, SCE will analyze the usage data for all completed projects that have twelve months of both pre- and post-data for the respective projects as further detailed in the filed 2021 Annual Report. The analysis provides an insight into the amount of energy savings which completed projects have realized.

The analysis started with 56 eligible properties that have been served by MF CAM. Several properties were removed from the analysis due to incomplete pre- and post KWH history based on the installation date of ESA changes.

The final sample had 20 properties which displayed a non-normal distribution. The normality was mostly impacted by 5 outliers in the sample but kept for the importance of the ESA program. Therefore, a Wilcoxon Signed Rank test was performed on the dependent sample.

The t-value for the difference between pre-kwh and post-kwh on the ESA properties is -1.28 and the corresponding p-value is 0.2174. This is greater than our pre-specified alpha level, 0.05. We conclude that the difference between the pre-kwh and post-kwh is not statistically significant. This means that the ESA related changes has no significant impact on decreasing kwh usage in the 20 eligible properties.

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47 *See* D.16-11-002, p. 213.

48 *See* D.17-12-009, p. 361.

49 Study: NMEC Feasibility for MF-CAM (SCE commissioned study). Available upon request.

STATISTIC	TOTAL KWH		MEAN KWH PER BILLING DAY	
PERIOD RELATIVE TO INSTALLATION DATE	BEFORE	AFTER	BEFORE	AFTER
MEAN	922.57	835.03	2.53	2.29
MEAN DIFFERENCE	-87.54		-0.2398	
Wilcoxon Signed Rank (alpha at 0.05)	-1.28		not performed	
p-value	0.2174		n/a	

STATISTIC	TOTAL KWH 12MONTHS BEFORE INSTALL	TOTAL KWH 12MONTHS AFTER INSTALL
MEAN	922.57	835.03
MINIMUM	-479.75	-629.92
MAX	4,366.58	4,071.00
STD DEVIATION	1,257.74	1,099.89
VARIANCE	1,581,920.02	1,209,760.03
n= Sample Size	VALID	20
	MISSING	0

CALIFORNIA ALTERNATE RATES FOR ENERGY ANNUAL REPORT

2. CARE EXECUTIVE SUMMARY

Summary of 2022 Results

SCE's California Alternate Rates for Energy (CARE) program provides a monthly energy bill discount that reduces bills between 30 and 35 percent for customers who meet the following program requirements:

- Either a customer's household income is below 200% the federal poverty guidelines (FPG), or
- The customer is enrolled in a qualifying categorical program, e.g., CalFresh/SNAP (food stamps), Supplemental Security Income (SSI), Medi-Cal for Families (Healthy Families A & B), etc.

Eligible residential customers reside in single-family households, sub-metered residential facilities, nonprofit group living facilities, agricultural employee housing facilities, and migrant farm worker housing centers.

This annual report provides information on SCE's CARE program accomplishments, extensive outreach efforts, and expenditures for PY 2022. At the end of the year, 1,165,186 customers were on the CARE rate, resulting in a penetration rate of 91% of the estimated eligible population.

CARE enrollment decreased from 1,402,456 on December 31, 2021, to 1,165,186 on December 31, 2022, which represents a net decrease of 17%. With this decrease, SCE has seen CARE penetration rates normalize and return to pre-COVID levels. Additionally, with the implementation of automatic recertification for customers with a high probability of being CARE eligible, SCE expects to see incremental gains in enrollment and penetration going forward and will continue to work towards meeting the Commission-directed CARE program goals and objectives.

Procedural Background

Similar to the ESA program, the 2022 CARE program continued to operate in accordance with the direction provided in D.21-06-015, which adopted budgets and program directives for the IOUs regarding their administration of income-qualified programs for the years 2021 through 2026.

On June 1, 2022, SCE along the PG&E, SDG&E, and SoCalGas simultaneously launched a coordinated Outbound Call Pilot for "attempted but failed" post-enrollment verified households as required by D.21-06-015, OP 13. The Outbound Call Pilot was implemented to assist participants of the CARE program who may need additional support to complete the paperwork needed to verify program eligibility. SCE's pilot is currently slated to continue through the end of April 2023 with a Tier 2 Advice Letter filing within three months of the pilot's conclusion.

2.1 Participant Information

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

Residential CARE Program[50]		
Electric Customers by Month		
PY 2022	CARE Customers	Percentage Change
Jan	1,348,032	
Feb	1,311,125	-2.89%
Mar	1,271,287	-3.12%
Apr	1,254,809	-1.29%
May	1,247,449	-0.58%
Jun	1,219,937	-2.15%
Jul	1,193,117	-2.10%
Aug	1,188,056	-0.40%
Sep	1,190,178	0.17%
Oct	1,192,875	0.21%
Nov	1,169,179	-1.86%
Dec	1,165,186	-0.31%

2.1.2 Describe the methodology, sources of data, and key computations used to estimate the utility's CARE enrollment rates by energy source.

SCE used the joint utility methodology adopted in D.01-03-028 for developing monthly enrollment estimates by energy source in 2022.[51] This methodology entails annual estimation of eligibility for CARE, ESA, FERA, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

Sources for the 2022 eligibility estimates included the January 2022 Health and Human Services (HHS) Poverty Guidelines[52] ("bundling" one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327), current

50 Due to the timing of collection of CARE enrollment data, numbers throughout this report may vary slightly based on reporting timeframe from each monthly report throughout the year.

51 Athens Research performs the analysis using the joint utility methodology to provide the estimates for the California IOUs.

52 Federal Register/Vol. 87, No. 14/January 21, 2022/Notices; pp. 3315-3316.

year small area vendor marginal distributions on household characteristics, Census 2020 Summary File 3 (SF3) data, Census American Community Survey (ACS) 2017-2021 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources.

The method takes into consideration ACS microdata relationships between guideline status (above/below 200% FPG), tenure, and fuel payment relationships. These cross classifications are fitted to small area (block group) marginals to produce payer type specific distributions, which can be aggregated to various other geographical levels.

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

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

2.1.2.1 Describe how the estimates of current demographic CARE-eligibility rates, by energy source for the pre-June 1st periods, were derived.

The joint utility methodology, as described above, was used throughout 2022.

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

CARE eligibility rates by small and large areas are developed so they apply to individual residential meters and sub-metered dwelling units only. Non-sub-metered master meters and other meters that do not provide residential service are not included in the "technical eligibility" meter counts.

2.1.2.3 Discuss how the estimates of current CARE-eligible households were developed.

See ***Section 2.1.2***, above. Note that the methodology is based on estimating small-area (block group) level household size by income and householder-age tabulations for the current year and connecting these estimates with small-area counts of households individually metered or sub-metered. Block group utility-specific estimates are then disaggregated or aggregated to various geographic levels within a given utility area: Zip+2, ZIP tract, county, territory, etc. Statewide estimates, regardless of utility boundaries, are also provided at small- and large-area levels.

2.1.2.4 Describe how current CARE customers were counted.

SCE runs a monthly report for all accounts currently enrolled in CARE. This monthly report incorporates:

- All CARE customer information necessary for reporting, and
- CARE enrollment and recertification dates.

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

2.1.2.5 Discuss how the elements above were used to derive the utility's CARE participation rates by energy source.

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

2.1.3 Provide the estimates of current demographic CARE-eligibility rates by energy source at year-end.

Electric	27.6%
Gas	N/A%

2.1.4 Provide the estimates of current CARE-eligible sub-metered tenants of master-meter customers by energy source at year-end.

Electric	45,212
Gas	N/A

2.1.5 Provide the current CARE sub-metered tenant counts by energy source at year-end.

Electric	27,991
Gas	NA

2.1.6 Provide the current CARE sub-metered enrollment rates by energy source at year-end.

Electric	62%
Gas	N/A

2.1.7 Discuss any problems encountered during the reporting period administering the CARE Program for sub-metered tenants and/or master-meter customers.

As SCE transitioned to a new SAP-based customer service system, new manual processes for sub-metered tenants and master-meter customers were developed. Tenant listings, which provide a detailed count of sub-metered tenants and/or master-metered customers who are on discounted CARE or FERA rate, were previously automated and now must be generated and distributed manually. Given that the manual tenant listing process is very time consuming, SCE implemented an on-demand tenant listing policy to ensure listings were provided to the property managers when requested. SCE is currently exploring options to reinstitute monthly tenant listing in 2023.

In December 2022, SCE soft launched recertifications for sub-metered tenants and is developing processes to continue recertifications for sub-metered tenants. No verifications for sub-metered tenants were issued in 2022 but new processes are currently being researched to reintroduce them. SCE focused on developing new manual processes for sub-metered tenants and master-meter customers prioritizing the enrollment application process to ensure eligible households could enroll in and receive a discount from CARE before moving on to recertification and verification.

2.1.8 Discuss the steps taken towards Marketing CARE to Mobile Home customers and converting Mobile Home Sub-metering to direct utility served customers.

SCE's Mobile Home Park Conversion (MHP) Project Managers, through the use of collateral materials and presentations, educate the park owners, managers, and residents about SCE's CARE program and engage to qualify as many residents as possible. Prior to COVID-19 mandates, SCE's MHP team held townhall meetings to provide all project information including CARE, MBL, and FERA programs for income-qualified customers. With the limitations during COVID-19, SCE

adjusted the typical communication process with park residents and, in partnership with SoCalGas, developed a video to share information while avoiding large in person gatherings.

MHP outreach assists in the collection of paper applications from park residents and sends them to the SCE's processing center. Additionally, as part of MHP outreach, SCE discusses the options for CARE and whether or not each customer qualifies based on their current economic situation. During 2022, SCE worked with 15 parks, reaching out to roughly 1,322 customers to see if they qualify for any IQP discounts including CARE. SCE signed up approximately 681 CARE / FERA and 23 MBL customers in the 2022 reporting year through MHP outreach.

2.2 CARE Program Summary

2.2.1 Please provide CARE Program summary costs.

CARE Budget Categories	2022 Authorized Budget	2022 Actual Expenses	% of Budget Spent
Outreach	$3,724,630	$3,315,009	89%
Processing, Certification and Recertification	$1,530,979	$1,277,364	83%
Post Enrollment Verification	$483,467	$661,415	137%
Information Tech./Programming	$570,000	$29,873	5%
Pilots	$ -	$ -	0%
CHANGES Program	$525,000	$490,735	93%
Measurement and Evaluation	$36,000	$68,286	190%
Regulatory Compliance	$478,809	$221,129	46%
General Administration	$1,337,746	$1,194,025	89%
CPUC Energy Division Staff	$135,625	$118,816	88%
Total Expenses	**$8,822,256**	**$7,376,65221**	**84%**
Subsidies and Benefits	$404,343,437	$666,223,958	165%
Total Program Costs and Discounts	**$ 413,165,693**	**$673,600,610**	**163%**

In 2022, SCE exceeded the authorized administrative budgets in the Post Enrollment Verification (PEV) and Measurement and Evaluation (M&E) Cost Categories. Higher PEV processing labor expenses were incurred as system users learned how to efficiently navigate our new SAP-based customer service system. M&E overages were a result of Low Income Needs Assessment (LINA) study expenses that were not originally forecasted. The most recent Decision required a 50/50 split between the CARE and ESA authorized budgets in paying for the

LINA which was not accommodated by original budget forecasts.[53] CARE only incurred minimal IT expenses as most IT work was covered under existing GRC funding for continued SAP development and enhancement.

2.2.2 Please provide the CARE Program enrollment rate to date.

CARE Enrollment			
Participants Enrolled	**Eligible Participants**	**Enrollment Rate**	**Target Met?**
1,165,186	**1,276,922**	**91%**	Yes

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

Customer complaints regarding recertification were received through SCE's Consumer Affairs Department. Recertification complaints are typically related to recertification removals, processing delays, and program eligibility questions. Below is the table of customer complaints received and resolved per month.

Month	Customer Complaints Received
January	0
February	3
March	8
April	5
May	8
June	11
July	19
August	21
September	47
October	29
November	16
December	21

[53] *See* D.21.06-015 at p. 393.

2.3 CARE Program Costs

2.3.1 Discount Cost

2.3.1.1 State the average monthly CARE discount received, in dollars, per CARE customer by energy source.

Average Monthly Electric Discount	**$45.12**
Average Monthly Gas Discount	NA

2.3.1.2 State the annual subsidy (discount) for all CARE customers by energy source.

Electric Subsidy	**$664,656,704**
Gas Subsidy	NA

2.3.1.3 Provide the Number and Percent of Green Tariff Shared Renewables (GTSR) and Enhanced Community Renewables customer base. Also provide the average total bill discount.

SCE's Green Tariff Shared Renewables (GTSR) rate and Enhanced Community Renewables are both voluntary and optional programs that allow SCE customers to tap into the power of the sun through new renewable energy options without installing solar panels on their roof.

In 2022, there were a total number of 151 CARE customers on the GTSR rate, which is 15% of the total active GTSR residential customers. No CARE customers enrolled in the Enhanced Community Renewable program.

The average total bill discount of CARE-enrolled GTSR customers received from the CARE program discount on the delivery portion of their bill was 55%; while the average overall total bill discount was 34%.

2.3.2 Administrative Cost

2.3.2.1 Show the CARE Residential Program's administrative cost by category.

Category	Total
Outreach	$ 3,315,009
Processing, Certification, Recertification	$ 1,277,364
Post Enrollment Verification	$ 661,415
IT Programming	$ 29,873
CHANGES Program	$ 490,735

Measurement & Evaluation	$	68,286
Regulatory Compliance	$	221,129
General Administration	$	1,194,025
CPUC Energy Division	$	118,816
Total Program Costs	**$**	**7,376,652**

2.3.2.2 Explain what is included in each administrative cost category.

Outreach

Includes solicitations, advertising, applications (printing and mailing), posters, brochures, flyers, postage, other outreach, staff labor, costs related to outbound dialing, a dedicated 800 phone number for CARE, and Capitation Fee Project.

Processing, Certification and Recertification

Includes staff labor, information technology, application processing, training, programming labor, and sub-meter certification.

Post Enrollment Verification (PEV)

Includes staff labor, information technology, verification processing, training, programming labor, and sub-meter verification.

Information Technology (IT) /Programming

Includes programming and labor costs associated with system enhancements, Decision compliance, and maintenance of existing processes.

CHANGES Program

Includes Cost of Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) program and the Post Enrollment Verification Outbound Call Pilot.

Measurement and Evaluation

Includes 2022 Statewide Low Income Needs Assessment (LINA) study.

Regulatory Compliance

Includes applications, testimony, advice filings, comments and reply comments, hearings, reports and studies, working group meetings, public input meetings, and tariff revisions.

General Administration

Includes office supplies, market research, program management labor (including pensions and benefits), and technical support and software licensing.

Commission Energy Division Staff Funding

Includes CPUC Energy Division Staff expenditures.

2.3.3 Provide the year-end December 31 balance for the CARE balancing account.

Electric CARE	**$81,561,682**

The year-end December 31,2022 balance for the CARE balancing account is overcollected by **$81,561,682.**[54]

2.3.4 Describe which cost categories are recorded to the CARE balancing account and which are included in base rates.

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

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

[54] ***See*** A23.04.003, Energy Resource Recovery Account (ERRA) Review Of Operations 2022, Exhibit No: SCE-02, p. 56-57 (April 3, 2023).

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

Customer Class	Average Monthly CARE Surcharge	Average Monthly Bill	CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
Residential	$18,028,490	$581,363,208	3.10%	$216,341,885	29.0%
Agricultural	$1,427,529	$27,854,988	5.12%	$17,130,350	2.3%
Commercial	$35,823,996	$618,441,498	5.79%	$429,887,948	57.6%
Industrial	$3,746,034	$45,607,454	8.21%	$44,952,403	6.0%
Public Authority	$3,081,422	$47,944,587	6.43%	$36,977,065	5.0%
Railroads	$51,813	$993,443	5.22%	$621,753	0.1%
Interdepartment	$2,051	$38,630	5.31%	$24,613	0.0%
Total	$62,161,335	$1,322,243,807	39.18%	$745,936,016	100.0%

2.4 Outreach

2.4.1 Discuss utility outreach activities and those undertaken by third parties on the utility's behalf including Lifeline coordination.

Unless otherwise stated, CARE and FERA program outreach is done concurrently. Customers are presented with a dual CARE/FERA application. Then, based on their submission, they are placed on the appropriate program or rejected as ineligible for either.

SCE's CARE and FERA programs continued to closely partner with internal SCE departments such as Public Affairs, Consumer Affairs, Marketing, Corporate Communications, and Community Involvement, and with employee volunteer-based Resource Groups. These programs also partner with external organizations, such as foundations, Faith-Based Organizations (FBO), and CBOs, in outreach activities that target SCE's hard-to-reach customer base.

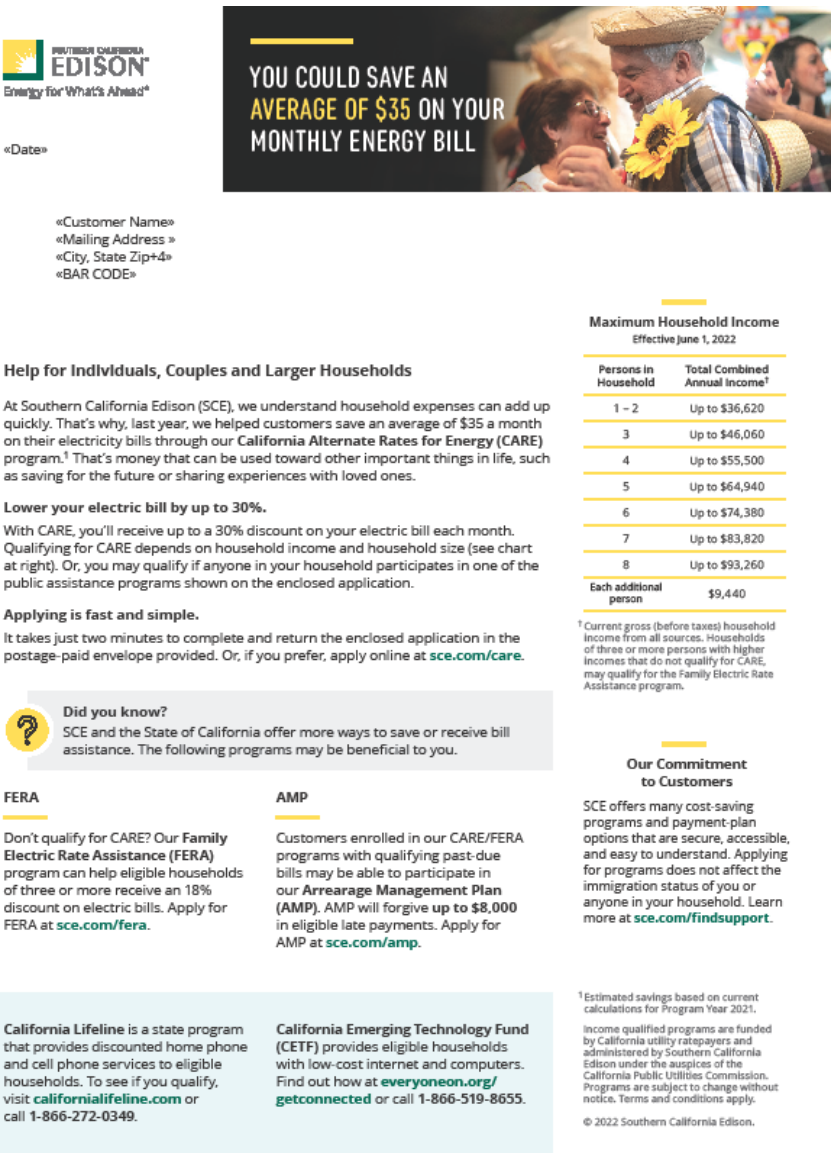
Following are descriptions of some of SCE's internal and external outreach activities SCE conducted in 2022:

Direct Mail

In 2022, SCE sent out over 1.4 million CARE direct mail packages. Packages include an outer envelope, a letter in both English and Spanish, an enrollment form in both English and Spanish, and a business reply envelope. The direct mail package was updated in April to include a new design which was used for all

CARE communications. The direct mail letter highlighted other programs including FERA, AMP, California Emerging Technology Fund (CETF) and Lifeline. The letter was sent out monthly to customers who were identified as likely to be eligible for CARE via SCE's statistical modeling, from January through May, and from July through November, or a total of 10 months. Direct mail continues to be a viable communication channel for CARE, with a response rate of over 5%.

Example of Direct Mail Letter- English and Spanish



Southern California Edison
Energy for What's Ahead®

«Date»

YOU COULD SAVE AN AVERAGE OF $35 ON YOUR MONTHLY ENERGY BILL

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

Help for Individuals, Couples and Larger Households

At Southern California Edison (SCE), we understand household expenses can add up quickly. That's why, last year, we helped customers save an average of $35 a month on their electricity bills through our **California Alternate Rates for Energy (CARE)** program.[1] That's money that can be used toward other important things in life, such as saving for the future or sharing experiences with loved ones.

Lower your electric bill by up to 30%.

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

Applying is fast and simple.

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

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**.

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**.

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**.

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

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.

Our Commitment to Customers

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

[1] Estimated savings based on current calculations for Program Year 2021.

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.

SOUTHERN CALIFORNIA EDISON
Energía para lo que viene

«Date»

Ayuda para individuos, parejas y grupos familiares más grandes

En Southern California Edison (SCE), sabemos que los gastos domésticos pueden sumarse rápidamente. Es por este motivo que el año pasado ayudamos a nuestros usuarios a ahorrar alrededor de $35 al mes en sus facturas de electricidad a través de nuestro programa **California Alternate Rates for Energy o CARE** (Tarifas alternativas de energía para California).[1] Este dinero puede usarse para otras cosas importantes de la vida, como ahorrar para el futuro o compartir experiencias con los seres queridos.

Baje su factura eléctrica hasta en un 30%.

Con CARE, todos los meses recibirá hasta un 30% de descuento en su factura eléctrica. La posibilidad de participar en CARE depende de sus ingresos y del tamaño de su grupo familiar (eche un vistazo al cuadro de la derecha). O bien, puede calificar si algún integrante de su hogar participa en uno de los programas de asistencia pública indicados en la solicitud adjunta.

Presentar la solicitud es rápido y sencillo.

Le tomará apenas dos minutos llenar y enviar gratis la solicitud adjunta en el sobre incluido. O, si lo prefiere, presente su solicitud en línea en **sce.com/care**.

¿Sabía que?
SCE y el Estado de California ofrecen otros programas para ahorrar o recibir asistencia con sus facturas. Los siguientes programas pueden resultarle de ayuda.

FERA

¿No califica para el programa CARE? Nuestro **Family Electric Rate Assistance o FERA** (Programa familiar de reducción de las tarifas de energía) puede ayudar a los hogares elegibles de tres o más personas a recibir un descuento del 18% en sus facturas de electricidad. Presente su solicitud para FERA en **sce.com/fera**.

AMP

Los usuarios inscriptos en nuestros programas CARE o FERA que tengan facturas vencidas elegibles pueden participar en nuestro **Arrearage Management Plan o AMP** (Plan de administración de deudas). AMP perdonará pagos retrasados elegibles de **hasta $8,000**. Presente su solicitud para AMP en **sce.com/amp**.

California Lifeline es un programa estatal que ofrece servicios de telefonía fija y móvil con descuento a los hogares elegibles. Para averiguar si califica, visite **californialifeline.com/es** o llame al **1-866-272-0350**.

California Emerging Technology Fund (Fondo de California para la tecnología emergente) brinda a los hogares elegibles computadoras y acceso a Internet a bajo costo. Obtenga más información en **everyoneon.org/getconnected** o llame al **1-866-519-8655**.

Ingresos máximos del hogar

Válido a partir del 1 de junio de 2022

Personas en el hogar	Total de ingresos anuales combinados†
1 – 2	hasta $36,620
3	hasta $46,060
4	hasta $55,500
5	hasta $64,940
6	hasta $74,380
7	hasta $83,820
8	hasta $93,260
Cada persona adicional	$9,440

† Ingresos brutos (antes de impuestos) actuales del hogar procedentes de todas las fuentes. Los hogares de tres o más personas con ingresos más altos que no califiquen para CARE, podrían ser elegibles para el programa Family Electric Rate Assistance.

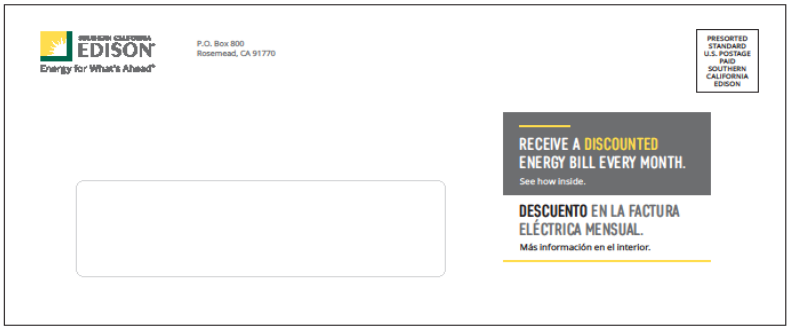
Nuestro compromiso con los usuarios

SCE ofrece numerosos programas de ahorro y opciones de planes de pago que son seguros, accesibles y fáciles de entender. Presentar una solicitud a cualquiera de estos programas no afectará su situación inmigratoria ni la de su familia. Obtenga más información en **sce.com/findsupport**.

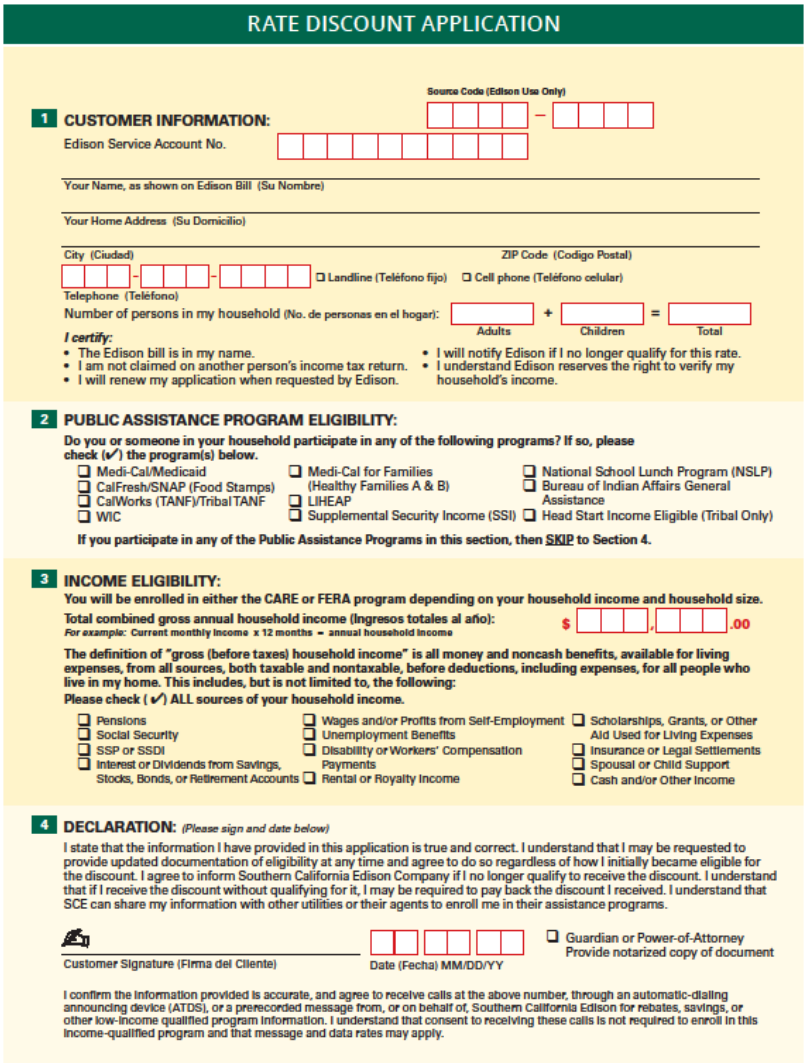
[1] Los ahorros previstos se basan en cálculos actuales para el año de programa 2021.

Los programas basados en el nivel de ingresos son financiados por los usuarios de servicios públicos de California y son administrados por Southern California Edison bajo la supervisión de la Comisión de Servicios Públicos de California. Los programas están sujetos a cambios sin previo aviso. Aplican ciertos términos y condiciones.

Example of O uter Envelope for CARE and FERA



Example of CARE Application- English and Spanish



RATE DISCOUNT APPLICATION

Source Code (Edison Use Only) ____ – ____

1 CUSTOMER INFORMATION:

Edison Service Account No. ____

Your Name, as shown on Edison Bill (Su Nombre)

Your Home Address (Su Domicilio)

City (Ciudad) ZIP Code (Codigo Postal)

___ - ___ - ____ ❑ Landline (Teléfono fijo) ❑ Cell phone (Teléfono celular)

Telephone (Teléfono)

Number of persons in my household (No. de personas en el hogar): ____ (Adults) + ____ (Children) = ____ (Total)

I certify:

- The Edison bill is in my name.
- I am not claimed on another person's income tax return.
- I will renew my application when requested by Edison.
- I will notify Edison if I no longer qualify for this rate.
- I understand Edison reserves the right to verify my household's income.

2 PUBLIC ASSISTANCE PROGRAM ELIGIBILITY:

Do you or someone in your household participate in any of the following programs? If so, please check (✓) the program(s) below.

- ❑ Medi-Cal/Medicaid
- ❑ CalFresh/SNAP (Food Stamps)
- ❑ CalWorks (TANF)/Tribal TANF
- ❑ WIC
- ❑ Medi-Cal for Families (Healthy Families A & B)
- ❑ LIHEAP
- ❑ Supplemental Security Income (SSI)
- ❑ National School Lunch Program (NSLP)
- ❑ Bureau of Indian Affairs General Assistance
- ❑ Head Start Income Eligible (Tribal Only)

If you participate in any of the Public Assistance Programs in this section, then SKIP to Section 4.

3 INCOME ELIGIBILITY:

You will be enrolled in either the CARE or FERA program depending on your household income and household size.

Total combined gross annual household income (Ingresos totales al año): $ ____,____.00

For example: Current monthly income x 12 months = annual household income

The definition of "gross (before taxes) household income" is all money and noncash benefits, available for living expenses, from all sources, both taxable and nontaxable, before deductions, including expenses, for all people who live in my home. This includes, but is not limited to, the following:

Please check (✓) ALL sources of your household income.

- ❑ Pensions
- ❑ Social Security
- ❑ SSP or SSDI
- ❑ Interest or Dividends from Savings, Stocks, Bonds, or Retirement Accounts
- ❑ Wages and/or Profits from Self-Employment
- ❑ Unemployment Benefits
- ❑ Disability or Workers' Compensation Payments
- ❑ Rental or Royalty Income
- ❑ Scholarships, Grants, or Other Aid Used for Living Expenses
- ❑ Insurance or Legal Settlements
- ❑ Spousal or Child Support
- ❑ Cash and/or Other Income

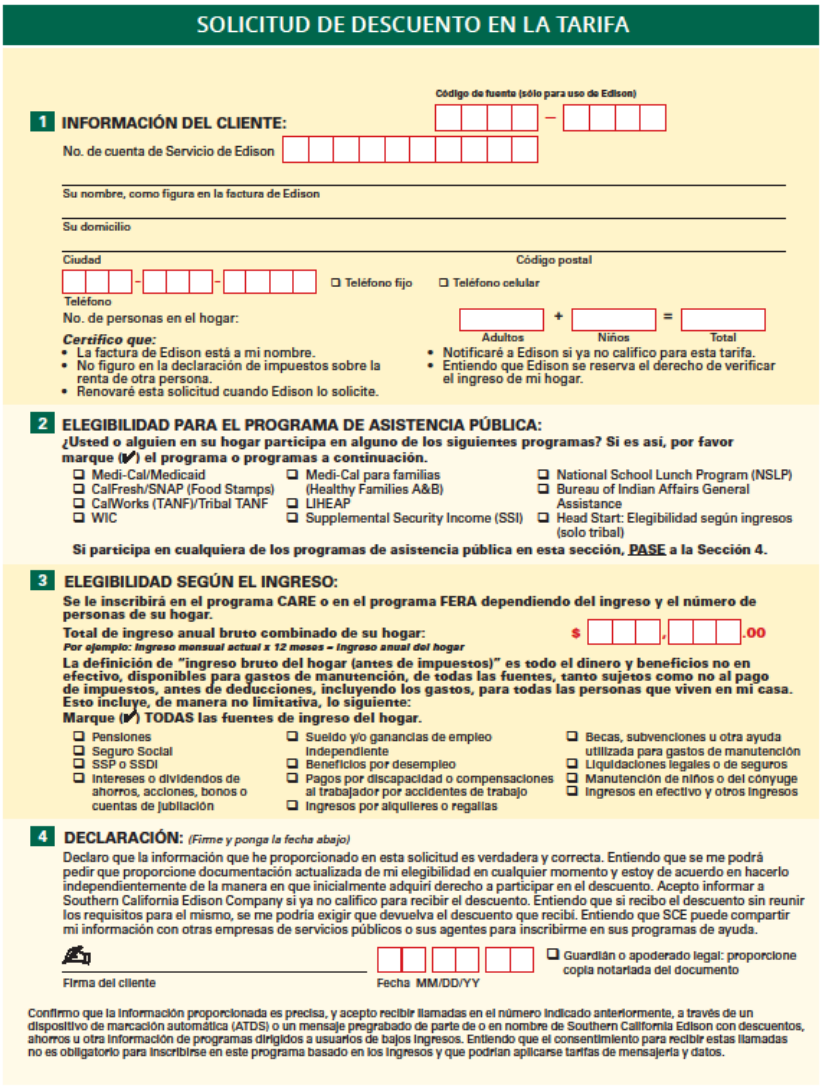
4 DECLARATION: *(Please sign and date below)*

I state that the information I have provided in this application is true and correct. I understand that I may be requested to provide updated documentation of eligibility at any time and agree to do so regardless of how I initially became eligible for the discount. I agree to inform Southern California Edison Company if I no longer qualify to receive the discount. I understand that if I receive the discount without qualifying for it, I may be required to pay back the discount I received. I understand that SCE can share my information with other utilities or their agents to enroll me in their assistance programs.

✍ _____ (Customer Signature (Firma del Cliente)) ____ (Date (Fecha) MM/DD/YY)

❑ Guardian or Power-of-Attorney Provide notarized copy of document

I confirm the information provided is accurate, and agree to receive calls at the above number, through an automatic-dialing announcing device (ATDS), or a prerecorded message from, or on behalf of, Southern California Edison for rebates, savings, or other low-income qualified program information. I understand that consent to receiving these calls is not required to enroll in this income-qualified program and that message and data rates may apply.



SOLICITUD DE DESCUENTO EN LA TARIFA

Código de fuente (sólo para uso de Edison)

1 INFORMACIÓN DEL CLIENTE:

No. de cuenta de Servicio de Edison

Su nombre, como figura en la factura de Edison

Su domicilio

Ciudad

Código postal

Teléfono

❑ Teléfono fijo ❑ Teléfono celular

No. de personas en el hogar:

Adultos + Niños = Total

Certifico que:

- La factura de Edison está a mi nombre.
- No figuro en la declaración de impuestos sobre la renta de otra persona.
- Renovaré esta solicitud cuando Edison lo solicite.
- Notificaré a Edison si ya no califico para esta tarifa.
- Entiendo que Edison se reserva el derecho de verificar el ingreso de mi hogar.

2 ELEGIBILIDAD PARA EL PROGRAMA DE ASISTENCIA PÚBLICA:

¿Usted o alguien en su hogar participa en alguno de los siguientes programas? Si es así, por favor marque (✔) el programa o programas a continuación.

- ❑ Medi-Cal/Medicaid
- ❑ CalFresh/SNAP (Food Stamps)
- ❑ CalWorks (TANF)/Tribal TANF
- ❑ WIC
- ❑ Medi-Cal para familias (Healthy Families A&B)
- ❑ LIHEAP
- ❑ Supplemental Security Income (SSI)
- ❑ National School Lunch Program (NSLP)
- ❑ Bureau of Indian Affairs General Assistance
- ❑ Head Start: Elegibilidad según ingresos (solo tribal)

Si participa en cualquiera de los programas de asistencia pública en esta sección, PASE a la Sección 4.

3 ELEGIBILIDAD SEGÚN EL INGRESO:

Se le inscribirá en el programa CARE o en el programa FERA dependiendo del ingreso y el número de personas de su hogar.

Total de ingreso anual bruto combinado de su hogar: $ .00

Por ejemplo: Ingreso mensual actual x 12 meses = Ingreso anual del hogar

La definición de "ingreso bruto del hogar (antes de impuestos)" es todo el dinero y beneficios no en efectivo, disponibles para gastos de manutención, de todas las fuentes, tanto sujetos como no al pago de impuestos, antes de deducciones, incluyendo los gastos, para todas las personas que viven en mi casa. Esto incluye, de manera no limitativa, lo siguiente:

Marque (✔) TODAS las fuentes de ingreso del hogar.

- ❑ Pensiones
- ❑ Seguro Social
- ❑ SSP o SSDI
- ❑ Intereses o dividendos de ahorros, acciones, bonos o cuentas de jubilación
- ❑ Sueldo y/o ganancias de empleo independiente
- ❑ Beneficios por desempleo
- ❑ Pagos por discapacidad o compensaciones al trabajador por accidentes de trabajo
- ❑ Ingresos por alquileres o regalías
- ❑ Becas, subvenciones u otra ayuda utilizada para gastos de manutención
- ❑ Liquidaciones legales o de seguros
- ❑ Manutención de niños o del cónyuge
- ❑ Ingresos en efectivo y otros ingresos

4 DECLARACIÓN: *(Firme y ponga la fecha abajo)*

Declaro que la información que he proporcionado en esta solicitud es verdadera y correcta. Entiendo que se me podrá pedir que proporcione documentación actualizada de mi elegibilidad en cualquier momento y estoy de acuerdo en hacerlo independientemente de la manera en que inicialmente adquirí derecho a participar en el descuento. Acepto informar a Southern California Edison Company si ya no califico para recibir el descuento. Entiendo que si recibo el descuento sin reunir los requisitos para el mismo, se me podría exigir que devuelva el descuento que recibí. Entiendo que SCE puede compartir mi información con otras empresas de servicios públicos o sus agentes para inscribirme en sus programas de ayuda.

Firma del cliente

Fecha MM/DD/YY

❑ Guardián o apoderado legal: proporcione copia notariada del documento

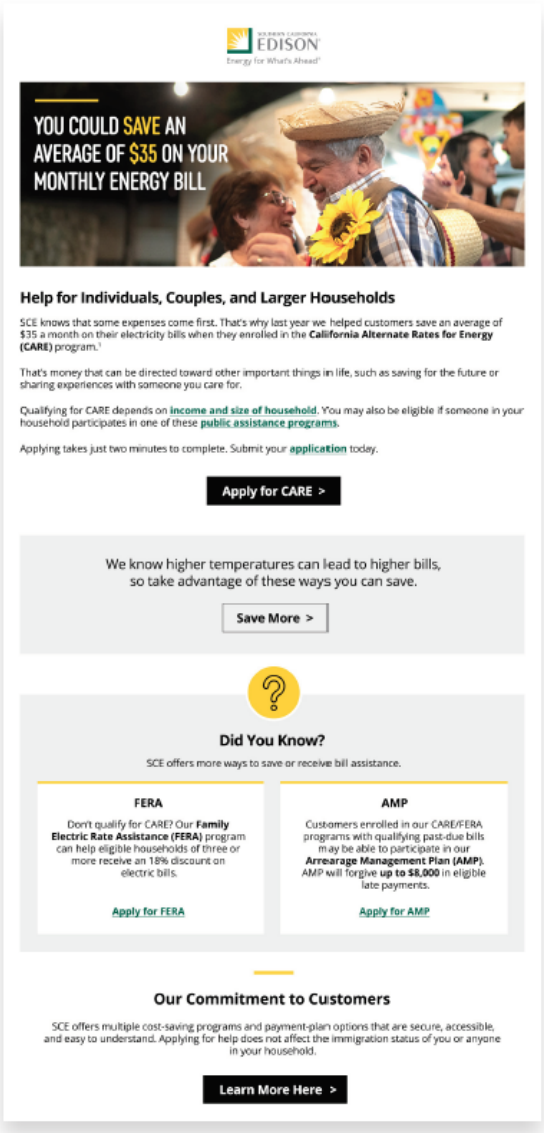
Confirmo que la información proporcionada es precisa, y acepto recibir llamadas en el número indicado anteriormente, a través de un dispositivo de marcación automática (ATDS) o un mensaje pregrabado de parte de o en nombre de Southern California Edison con descuentos, ahorros u otra información de programas dirigidos a usuarios de bajos ingresos. Entiendo que el consentimiento para recibir estas llamadas no es obligatorio para inscribirse en este programa basado en los ingresos y que podrían aplicarse tarifas de mensajería y datos.

Emails

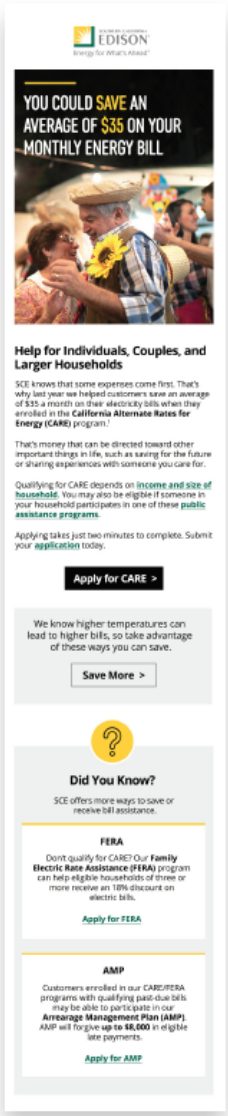
In 2022, SCE sent over 2 million emails to customers who were identified as likely to be eligible for CARE via SCE's statistical modeling. SCE updated the emails in May to include a new design in keeping with all CARE communications. The open rate for all emails averaged over 51%, with a 3.68% click rate. The open rate in 2022 was higher than the open rate in 2021. The top click in the email is "Apply For CARE" at 2.8%.

Examples of CARE Email- English and Spanish

Desktop



Mobile



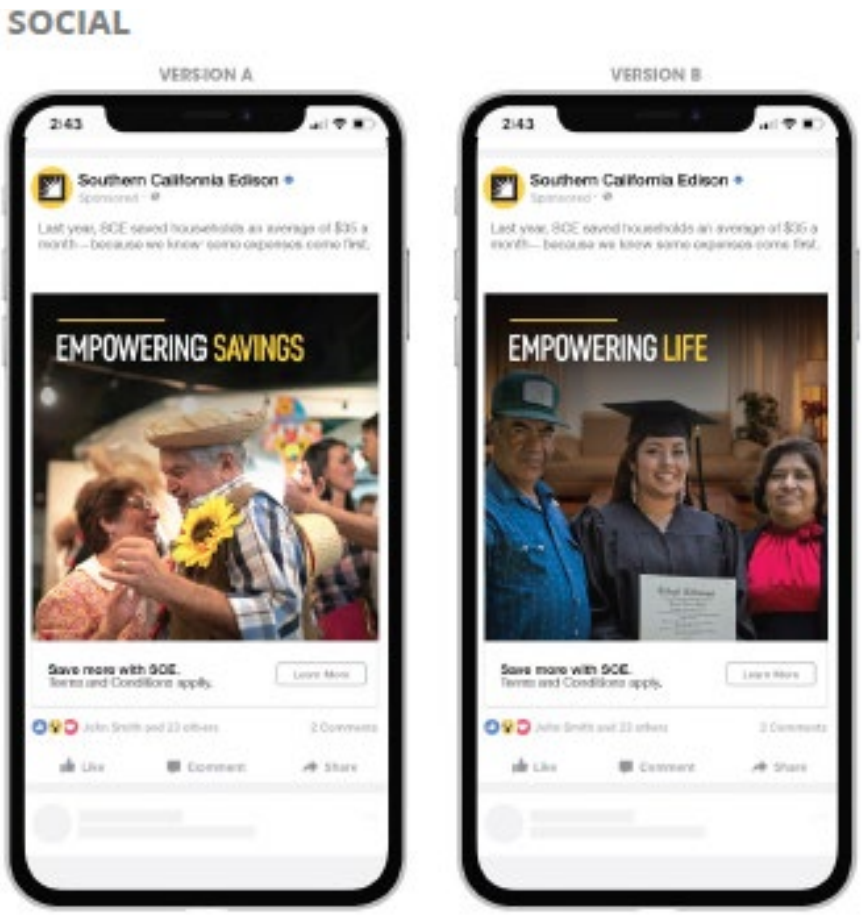
Mass Media

Beginning in July and through December, SCE ran a media campaign consisting of Social, Programmatic Banner Ads and Search. The campaign covered the full SCE territory. The campaign ran in both English and Spanish, for both CARE and FERA in social and programmatic communications. Programmatic display advertising is the automated buying and selling of banner ads that are placed on specially designated areas of websites, on social media platforms, or in apps. Combined CARE and FERA search ran in English only. SCE partnered with an advertising agency to deliver this multi-channel campaign to achieve reach and engagement goal. While programmatic enabled the ability to scale and reach, most of the performance driven metrics (clicks and actions taken) were through

Social and Search. CARE and FERA campaign impressions totaled over 35 million, with over 112,000 clicks, and a click through rate (CTR) of 0.32%. SCE selected top sites and apps to place ads. SCE leveraged Google auto-optimization technology and manually adjusted metrics on a regular basis to improve performance.

CARE social and programmatic communications generated a total of 8.2 million impressions and over 24,000 clicks on Facebook and Instagram. CARE English had over 4.9 million impressions and 14,000 clicks, and a 0.29% CTR. In Spanish, CARE had 3.3 million impressions and over 10,000 clicks for a CTR of 0.30%. While FERA generated a higher volume of impressions vs. CARE, the CTR performance for CARE was higher than FERA.

Examples of CARE Social Media – English and Spanish



VERSION A

VERSION B

Examples of Display Ads – English and Spanish

300x250

320x480

160x600

728x90

300x250

320x480

160x600

728x90

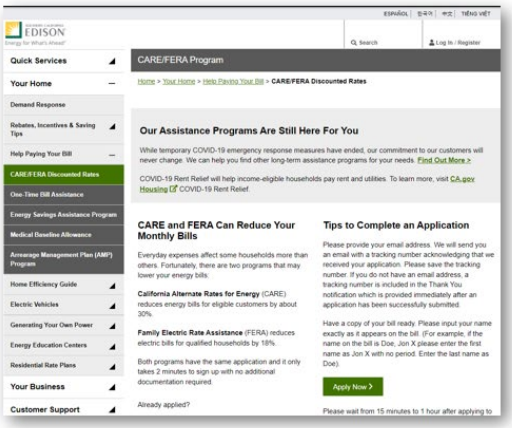
Paid search generated over 173,000 impressions, over 55,000 clicks, and a CTR of 32.1%. The CTR is very strong across both branded and non-branded segments. Top brand keywords are “care program Edison,” “Edison care program,” “Edison light bill payment,” and “sce.care.”

SCE.com Website and Online Registration Form

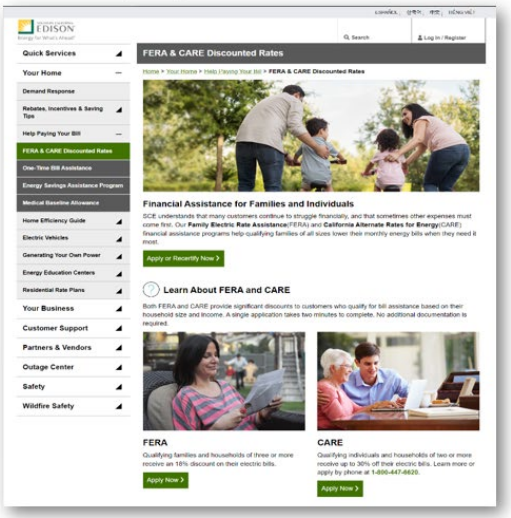
In July of 2022, SCE launched a newly redesigned CARE website. The sce.com page had 1.3 million visits in 2022, with over 60% during the media campaign. The highest visited months were July through October, with the highest month in September with over 170,000 page visits. SCE’s engagement rate was 57%, which means that 57% of page visits scrolled or clicked on the page. Average time on page was 83 seconds. The return visit rate is close to 20% within 30 days. CARE engaged visits have a high apply action rate of 50%. The top apply click is “Apply or Recertify” now. Online application completions increased 65% from 2021 to 2022 to 185,000.

Examples of CARE FERA Website

Pre- Redesign Page



Post-Redesign Page



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

Home Energy Report Total Counts for 2022

Customers enrolled in CARE as of December 31, 2022	**1,165,186**
Number of HER Recipients on a CARE rate	**437,502**
Percentage of CARE population that received HERs	**38%**

SCE uses a Randomized Control Trial experimental design model to select customers who will receive a Home Energy Report (HER). A Home Energy Report is mailed and emailed to select customers and compares their energy usage to similar neighbors. The comparison is meant to trigger behavioral change and motivate customers to reduce energy usage. In 2022, 437,502 CARE customers received HERs. In total, HERs reached approximately 1.9 million customers, 38% of those customers were also on CARE. This exceeds the 15% percent of HERs that should be sent to CARE customers, as mandated by the CPUC.[55]

[55] D. 09-09-047 requires SCE to "endeavor to exceed the behavioral programs participation minimum of 5% of the households represented in [its] program portfolios, by pursuing behavioral programs on a greater scale if they believe this goal underestimates potential in this area . . . ."

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

Using the percentage of approved applications by volume from various outreach methods, SCE's four (4) most effective outreach methods in 2022 follow:

- Strategic page placement of assistance program information and direct links on the SCE.com website to appeal to customers using the internet. Customer enrolling via internet generated 40% of all enrollments.
- Call center enrollment efforts, which include enrollments through third-party interactive voice response campaigns, generated 35% of all enrollments.
- General enrollment efforts, which generated 24% of all enrollments. These outreach efforts include the Capitation Fee Project, collateral materials, and direct mailings.
- Internal and external data-sharing efforts generated 1% of all enrollments.

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

Through many outreach, marketing, and awareness campaigns, SCE has been persistent in its ongoing efforts to reach and enroll customers in hard-to-reach, non-english speaking customers. Significant outreach efforts used to reach these customers in 2022 included, but were not limited to:

- Multilingual outreach using both direct-to-consumer and mass media advertising with print or digital ads in Spanish and Asian languages, and
- Designing CARE marketing materials and correspondence to reach increasing numbers of ethnic populations and under-penetrated geographic areas.

SCE ended the 2022 program year at 91% penetration and will continue to vigorously market the program to achieve the 90% penetration rate goal.

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

SCE continued collaborating with SoCalGas, and local water utilities, as directed in D.11-05-020, to share CARE participant data electronically in order to help customers enroll in each utility's program via customer level data matching. In 2022 approximately 2,749 customers were enrolled in SCE's CARE rate through data sharing with these utilities.

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

Contractors who perform ESA program assessment services assist qualified customers in completing a CARE application. The CARE program continually integrates its efforts and messaging with the ESA program at all outreach events, communications, and marketing campaigns.

Additionally, when a customer enrolls in CARE, the customer's information is provided to the ESA program as a lead. In cases where a CARE customer has passed income documentation as part of the High Usage Post Enrollment Verification process (HU PEV), CARE informs the ESA program of the verification, and the customer will not need to re-verify their income with the ESA program.

2.4.6 Describe the efforts taken to reach and coordinate the CARE Program with other related low-income programs to reach eligible customers.

SCE utilizes the Capitation Fee Project as a channel to coordinate with service providers of related low-income programs to provide one-on-one assistance to SCE's hardest-to-reach customer base. In 2022, SCE continued to partner with its agencies to provide electronic versions of assistance materials to assist as best as possible.

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

Disaggregation Reporting related to AB 793 was developed to be leveraged by Energy Efficiency (EE) and Demand Response (DR) programs for outreach. Additionally, information about SCE's DR programs was added to the in-home energy education. The cost for the leave behind materials (Flyers, enrollment pamphlets, etc.) was paid for by the respective DR program.

See the second and third paragraph of ***Section 1.2.5*** for additional details.

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

SCE includes the following language on its individually metered customer CARE application for cross-referral of low-income customers to CSD, including for the Low Income Home Energy Assistance Program (LIHEAP):

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

SCE call center representatives refer income-qualified customers who are in arrears to their local LIHEAP agency for payment assistance. SCE customers will reach out to LIHEAP Local Service Providers (LSPs) where they will fill out the LIHEAP application assistance forms. Customers will provide LSPs with all their income documents and utility billing statements as proof of LIHEAP eligibility. LSPs will then determine the amount of assistance the customer will receive.

Each LSP will have access to SCE's LIHEAP portal where they will able to log on to the portal system using a user name and password (two step authentication process). Each LSP will have to sign and submit a Non Disclosure Agreement form to SCE before receiving access to the LIHEAP portal.

Once the LSP has logged into the LIHEAP portal, they will have to provide the customer's account number and last name in order to gain access to the customer's account information. The LSP will then be able to view the customer's account information: account number, name, address, disconnection status, billing history (arrearage)—all the information they need to validate the customer's LIHEAP application. Once satisfied, within the portal, the LSP will place a pledge for payment on the customer's behalf with the understanding that the funds will arrive from CSD within 60 days.

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

SCE remains steadfast in its commitment to promoting a robust culture of evidence as it continues to leverage advanced statistical techniques and methodologies in enhancing its business operations. It does this by highlighting the indispensable and influential role played by data in shaping programs and policies aimed at responding more effectively to the needs of low-income households. Predictive analytics serve as a fundamental tool in enhancing customer acquisition. This continues to identify customers with a significant propensity to be approved or recertified for CARE or FERA, considering the unique configuration of socio-economic and demographic characteristics that distinguish these two populations.

Additionally, multivariate statistical models ascertain the CARE customers most likely to be treated with energy efficiency measures from the ESA program. Equally important, disproportionate stratified random sampling continues to be employed in selecting customers in the monthly samples for verification, sharply focusing on over-sampling customers with the greatest proclivity to fail eligibility requirements. A vital component of that operation involves analyzing the results for verifications, aimed at further refining the framework that guides the random sampling.

The leveraging of these techniques allows for greater cost effectiveness through higher acquisition rates in marketing and outreach efforts. Additionally, more effective verification modeling ensures higher program equity and reduces cross subsidization for ineligible customers.

2.4.9 Low CARE Penetration ZIP Codes. Discuss the strategies that were effective in targeting and enrolling these hard to reach households. Include the IOU's successes, short-comings, and corrective plans in ME&O strategies to enroll customers in zip codes that fall into these categories.

SCE implemented preferential targeting for low CARE penetration ZIP codes. Preferential targeting bypasses SCE's standard statistical targeting and modeling scores to ensure customers from low penetration ZIP codes are included in the direct marketing efforts. SCE implemented preferential targeting twice in 2022 and is continuing the review and implementation of preferential targeting for 2023.

2.5 Processing CARE Applications

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

As outlined in ***Section 2.1.7***, SCE soft launched recertifications for sub-metered tenants in December 2022. In this process, SCE communicates directly with enrolled sub-metered tenants and provides them with a recertification request. If no response is received, SCE will mail a second request to the tenants before removing them from the rate.

2.5.2 Describe any contracts the utility has with third parties to conduct certification, re-certification and/or verification on the utility's behalf. Describe how these third-party efforts compare to the utility's efforts in comparable customer segments, such as hard-to-reach or under-served. Include comparisons of effectiveness and cost-effectiveness of comparable customer segments, if available.

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

SCE partners with CBOs and private contractors to enroll customers into the CARE program. In CARE Table 7, SCE lists The Capitation Fee Project contractors, enrollments, and contractor status that is, private, CBO, or women, minority, disabled veteran or business enterprise (WMDVBE) contractors.

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

2.6 Program Management

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

In 2022, SCE discovered a system issue where customers who were issued a new account number did not have CARE or FERA transferred to their new account and were not provided the associated discount. Upon discovery of the issue, SCE immediately began to identify affected customers, reenroll then in the appropriate program, and rebill them for any unpaid subsidy. SCE notified the ED of the issue and provided weekly updates on SCE's reenrollment and rebilling progress until the remediation effort was completed. Additionally, SCE developed new

reconciliation and reporting processes where any customers who experienced similar account change issues are identified and corrected as they are discovered to minimize future reenrollment and/or rebilling.

SCE also experienced times where the processing of Post Enrollment Verification processing documents became backlogged due to timely, manual processes like the above remediation effort. In these cases, SCE issued PEV customers extensions to allow for additional processing times.

2.7 Pilots

In 2022, SCE launched an Outbound Call Pilot for "attempted but failed" post-enrollment verified households with a budget not to exceed $80,000. The pilot is ongoing and is expected to conclude in the second quarter of 2023. More information on the pilot will be provided via a Tier 2 Advice Letter filing to be submitted within three months of the pilot's conclusion.

2.8 Studies

2022 Low Income Needs Assessment (LINA) Study

Please refer to ***Section 1.8.1.***

Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) Program Evaluation

The CHANGES program was created to assist Limited English Proficient (LEP) customers in understanding their bills resolving billing issues, and disputes with their utility and/or learning about available programs to assist with paying energy bills and/or ways to save energy and reduce bills. Planning for the evaluation began in September 2021 with the development of the scope of work. PG&E is managing a statewide evaluation of the CHANGES program. The work scope and RFP were released in October 2021. Opinion Dynamics was selected as the consulting firm conducting the study. The project initiation meeting was in February 2022. A public webinar on the research plan was held in June 2022. The overall goal of the study was to evaluate the overall performance of CHANGES and provide recommendations regarding improvements and modifications to the program.

The study research areas and objectives include the following: (1) assessing the overall program performance associated with the anticipated needs of the target population, (2) identifying the extent to which current program data collection supports an understanding of the program's effectiveness and ongoing reporting for success, (3) identifying duplicative services, if any, (4) documenting how the budget and program costs are allocated and appropriate across services or functional areas, and (5) evaluating the operational effectiveness of the administration of the program.

The study includes interviews with participating CBOs and a mail survey of customers receiving services through the program. In addition, existing program documentation has been examined to determine how to make improvements and better be able to assess the benefits of the program. The draft results have been shared with the study working group. A more comprehensive review of the draft results will be shared in a public webinar prior to finalizing the study. A written report documenting the findings and recommendations for the program is expected in Quarter 2 of 2023.

Categorical Eligibility Study

Please refer to ***Section 1.8.1***. See also ***Section 1.8.2***, **ESA Program Evaluations Table.**

2.9 CARE Restructuring Working Group

In Phase 3 of the Examination of the IOUs Residential Rate Structures proceeding (R.12-06-013), the Commission considered making structural change to the CARE discount also referred to as CARE restructuring. The CARE Restructuring Working Group was convened for IOUs and various stakeholders to coordinate on various aspects of this effort. Ultimately, in D.19-09-004, the Commission concluded that CARE would not be restructured at that time. In 2022, there were no activities for this working group.

2.10 Miscellaneous Describe outreach efforts contained in Attachment 6 of the Joint Stipulation adopted in D.21-06-015.

- 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.
- The same information was integrated into ESA's Energy Education Kits and was shared with ESA contractors during the quarterly Contractor Summit hosted on January 26, 2022. The Contractor Summit facilitators added the CETF information contact information in the presentation decks and also discussed the availability of low cost internet service options for low-income households. Contractors were encouraged to share the same information when providing the Energy Education Kits to customers.

- There are currently, 1.2 million customers enrolled in the CARE program, approximately 69% (838,537) have emails on file. In 2022, SCE sent out over 1.4 million CARE/FERA direct mail packages. Packages included an outer envelope, a letter in both English and Spanish, an enrollment form in both English and Spanish, and a business reply envelope. The direct mail package was updated in April to include a new design which was used for all CARE communications. The direct mail letter includes CETF information among other programs. The letter was sent out monthly to customers from January through May, and from July through November, or a total of 10 months. Approximately 2 million CARE/FERA customers received the same campaign via email for 7 months in 2022. SCE shared the number of CARE/FERA customers receiving this information as well as the number of customers who have emails on file to CETF. See table below.

CETF Campaign		
CARE Direct Mail		**FERA Direct Mail**
7/7/2022	99,592	68,056
7/29/2022	73,359	79,685
8/22/2022	95,592	68,056
8/29/2022	73,359	147,741
9/22/2022	83,439	62,246
9/29/2022	63,594	35,888
10/24/2022	61,516	35,699
10/31/2022	62,593	38,773
11/16/2022	124,109	49,619
Sub Total	737,153	585,763
CARE Emails		**FERA Emails**
7/1/2022	196,197	147,568
8/1/2022	196,274	148,123
9/1/2022	146,904	37,281
9/2/2022	49,320	110,628
10/1/2022	195,621	148,311
11/1/2022	194,232	145,507
12/1/2022	190,754	148,199
Sub Total	1,169,302	885,637
TOTAL	**1,906,455**	**1,471,400**
Total CARE/FERA Communications		**3,377,855**

3. CARE EXPANSION PROGRAM

The CARE Expansion Program offers a monthly discount on energy bills for qualifying nonprofit, group-living facilities. A facility must meet, at minimum, all of the following criteria in order to be eligible:

- Corporation operating the facility must have tax exemption under IRS Code 501(c)(3).
- A minimum of 70% of the energy consumed at the facility must be for residential purposes.
- Facility will be required to recertify eligibility annually. As part of that process, facility will be required to estimate amount of discount received, and explain how the funds were used for direct benefit of the residents.

3.1 Participant Information

3.1.1 Provide the total number of residential and/or commercial facilities by month, by energy source for the reporting period.

2022	Commercial		Residential	
Month	Electric	Gas	Electric	Gas
Jan	118	NA	370	NA
Feb	99	NA	284	NA
Mar	125	NA	362	NA
Apr	120	NA	340	NA
May	127	NA	391	NA
Jun	133	NA	401	NA
Jul	126	NA	355	NA
Aug	132	NA	385	NA
Sep	130	NA	380	NA
Oct	125	NA	369	NA
Nov	123	NA	367	NA
Dec	130	NA	392	NA

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

Facility Type	Electric	Gas
Commercial	138	NA
Residential	412	NA

3.2 Usage Information

3.2.1 Provide the average monthly usage by energy source per residential facility and per commercial facility.

Commodity	Residential	Commercial
Gas	NA	NA
Electric	921	14,473

To calculate the monthly average, SCE identified the monthly energy usage of all the residential and commercial accounts and divided the usage by the total number of respective facilities.

3.3 Program Cost

3.3.1 Administrative Cost (Show the CARE Expansion Program's administrative cost by category).

3.3.1.1 Discount Information

See **Table 2.2.1**, CARE Program Summary Costs, above.

3.3.1.2 State the average annual CARE discount received per residential facility by energy source.

Residential Facility Gas Discount	NA
Residential Facility Electric Discount	**$1,013**

3.3.1.3 State the average annual CARE discount received per commercial facility by energy source.

Commercial Facility Gas Discount	NA
Commercial Facility Electric Discount	**$10,040**

3.4 Outreach

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

In order to outreach for the CARE Expansion Program to potentially eligible non-profit facilities, SCE employed the following activities:

- Potentially eligible customers were made aware of the CARE Expansion Program through SCE's Customer Contact Center.

- Events conducted by SCE's Local Public Affairs department promoted income-qualified programs to community leaders across SCE's service territory.
- Organizations which participated in the CARE Capitation Fee Project offered help to eligible customers in completing CARE applications for the CARE Expansion Program.
- See ***Section 2.4.1***, above, for additional information on SCE's Outreach Activities undertaken by third parties on SCE's behalf.

Discuss each of the following:

3.4.1.1 Discuss the most effective outreach method including a discussion of how success is measured.

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

- SCE partners with nonprofit organizations throughout the territory for CARE enrollment purposes,
- SCE's Customer Contact Center representatives promote the Expansion program to potential qualifying facilities whenever possible, and
- Outreach success is measured via the count of new, approved CARE Expansion application enrollments.

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

SCE does not share Facility or other related CARE Expansion data.

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

The primary barrier to participation for the CARE Expansion Program is due to the lack of knowledge about the availability of CARE to the nonprofit community. To help address this issue, SCE's call center representatives continue to be trained to pre-screen customers and, based on customer responses, to offer the program when speaking with the owners of potentially qualified group living facilities and homeless shelters.

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

SCE continued to explore additional ways to process applications more cost-effectively, including using optical character recognition (OCR) that could process applications more efficiently. SCE has been expanding the use of OCR and has been further calibrating the machinery to increase accuracy.

3.5 Program Management

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

SCE did not issue any CARE Expansion Program recertifications in 2022. However, SCE did recertify all CARE Expansion participants over the years of 2020 and 2021. Given the recent decision that modifies the CARE Expansion Program from two years to four years pursuant to D.21-06-015, OP 6, SCE does not expect to issue any expansion program recertifications until 2024.

4. FAMILY ELECTRIC RATE ASSISTANCE PROGRAM EXECUTIVE SUMMARY

Summary of 2022 Results

SCE's Family Electric Rate Assistance (FERA) program provides a monthly energy bill discount that reduces bills by about 18% percent for customers with households of three or more persons with total income within 250% FPG. Eligible residential customers reside in single-family households or sub-metered residential facilities. This annual report provides information on SCE's FERA program accomplishments, extensive outreach efforts, and expenditures for PY 2022.

In SCE's service territory, out of an estimated eligible 221,674 households, approximately 26,112 households were enrolled in FERA at the end of 2022. This equates to approximately 12% enrollment-to-eligibility ratio based on the Commission-directed FERA program goals. FERA enrollment decreased by 3,180 from the year end 2021 enrolled population of 29,292 on December 31, 2021, which represents a net decrease of 9%. Although FERA has unique enrollment barriers, such as offering CARE and FERA on one enrollment form, SCE, in partnership with the ED and other electric IOUs, continues to work towards meeting the Commission-directed FERA program goals and objectives.

Procedural Background

Similar to the ESA and CARE programs, the 2022 FERA program continued to operate in accordance with the direction provided in D.21-06-015, which adopted budgets and program directives for the IOUs regarding their administration of low-income program for the program years 2021 through 2026.

Starting July 1, 2022, Senate Bill (SB) 756, redefined "low-income customers" to include persons and families whose household income is at or below 250% of FPG. This modification expanded the eligibility for FERA customers to enroll into the ESA program. In 2022, SCE's ESA program was oversubscribed; therefore, SCE did not treat these newly eligible customers, rather SCE opted to prioritize these customers in 2023. Please refer to ***Section 1.2.3*** for SCE's ESA ramp down/ramp up activities.

In December 2022, SCE implemented its auto-recertification process for the FERA program, which mirrors the CARE program auto-recertification process pursuant to D.21-06-015, OP 27.

4.1 Participant Information

4.1.1 Provide the total number of FERA customers By Month for the Reporting Period.

2022	FERA Enrolled[56]
January	28,380
February	27,681
March	26,441
April	26,187
May	26,044
June	25,358
July	24,791
August	24,845
September	25,351
October	25,828
November	25,969
December	26,112

[56] The "FERA Enrolled" column reflects the cumulative number of customers in the relevant month that received the discount and excludes sub-meter accounts.

4.1.2 Provide the Total Number of FERA-Eligible Households, FERA-Participating Households, and FERA Household Enrollment Rates By Quarter.

TABLE 2 FERA Enrollment Rate			
2022 Quarter Ending	(Estimated) FERA Eligible Households[57]	FERA Participating Households	FERA Household Enrollment Rate[58]
March 31	221,674	26,441	12%
June 30	221,674	25,358	11%
September 30	221,674	25,351	11%
December 31	221,674	26,112	12%

4.1.3 Discuss How the Estimates of Current FERA-Eligible Households Were Developed.

SCE used the joint utility methodology adopted in D.01-03-028 for developing monthly enrollment estimates by energy source in 2022.[59] This methodology entails annual estimation of eligibility for CARE, ESA, FERA, and other income-by-household size parameters at the small area. Please see ***Section 2.1.2*** above for explanation of how the estimate is created..

4.1.4 Provide the Current FERA Sub-Metered Tenant Counts At Year-End.

As of December 31, 2022, 87 sub-metered tenants were participating in FERA.

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57 Compliance Filing of Pacific Gas & Electric (U 39-M) on Behalf of Itself, Southern California Gas Company (U 904-G), San Diego Gas & Electric Company (U 902-M) and Southern California Edison Company (U 338-E) Regarding Annual Estimates of CARE Eligible Customers and Related Information as reflected in A.19-11-003, et al. Originally filed on February 12, 2021. The analysis and subsequent report for this compliance filing is produced by Athens Research.

58 The FERA household enrollment rate is calculated by dividing FERA Participating Households by FERA-Eligible Households.

59 Athens Research performs the analysis using the joint utility methodology to provide the estimates for the California IOUs.

4.1.5 Discuss Any Problems Encountered During the Reporting Period Administering the FERA Program for Sub-Metered Tenants and/or Master-Meter Customers.

FERA experienced the same impacts as CARE described in ***Section 2.1.7***.

4.2 FERA Program Costs

4.2.1 Discount Cost

4.2.1.1 State the Average Monthly FERA Discount Received, In Dollars Per FERA Customer.

The average monthly FERA discount received in dollars per FERA customer was $32.61. The total FERA discount is calculated by taking the total savings for each month divided by the number of enrolled customers in that month, and averaging those numbers by 12.

4.2.1.2 State the Cumulative Annual Discount for All FERA Customers.

The cumulative annual discount for all FERA customers was $11,482,677.

4.2.2 Administrative Costs

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

FERA Program Administrative Costs by Category and Benefits	
Category	**Cost**
Outreach	$807,070
Processing, Certification, and Verification	$30,463
Post Enrollment Verification	$13,849
IT Programming	$7,036
General Administration	$18,254
TOTAL PROGRAM COSTS	**$876,673**
CUSTOMER BENEFITS	$11,482,677
TOTAL PROGRAM COSTS & CUSTOMER BENEFITS	**$12,359,350**

4.2.2.2 Explain what is included in each administrative cost category.

The table below provides description of expenses that would be incurred in each cost category.

Category	Description
Outreach	• Bill inserts, • Advertising, • Applications (printing and mailing), • Posters, brochures, and flyers, • Postage, • Other outreach, • Staff labor, • Costs related to out-bound dialing, an 800 (toll-free) number, and • Capitation Fee Project.
Processing, Certification, Recertification	• Staff labor, • Information technology, • Application processing, • Training, • Programming labor, and • Sub-meter certification.
Post Enrollment Verification	• Staff labor, • Information technology, • Verification processing, • Training, • Programming labor, and • Sub-meter verification.
General Administration	Information Technology / Programming: • Programming and labor costs associated with system enhancements, compliance, and maintenance of existing processes. Regulatory Compliance: • Applications, • Testimony, • Advice filings, • Comments and reply comments, • Hearings, • Reports and studies, • Working group meetings, • Public input meetings, and

Category	Description
	• Tariff revisions. Other: • Office supplies, • Market research, • Program management labor (including pensions and benefits), and • Technical support and software licensing.
Startup	Labor and system programming to implement the program.
Benefits	Rate discounts / subsidy.

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

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

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

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

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

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

SCE filed Advice Letter 4638-E on November 10, 2021, to reestablish FERA Balancing Account in accordance with D.21-06-015.

The year-end December 31,2022 balance for the FERA balancing account is undercollected by **$11,081,389**[60].

4.3 Outreach

4.3.1 Discuss Utility Outreach Activities and Those Undertaken By Third Parties On The Utility's Behalf.

General Awareness

Unless otherwise stated, CARE and FERA program outreach is done concurrently. Customers are presented with a dual CARE/FERA application. Then, based on their submission, they are placed on the appropriate program or rejected as ineligible for either.

Following are descriptions of some of SCE's internal and external outreach activities related specifically to FERA that were conducted in 2022:

Direct Mail

In 2022, SCE sent out over 1.2 million FERA direct mail packages. Packages include an outer envelope, a letter in both English and Spanish, an enrollment form in both English and Spanish, and a business reply envelope. The direct mail package was updated in April to include a new design which was used for all FERA communications. The direct mail letter highlighted other programs including AMP, CETF and Lifeline. The letter was sent out monthly from January through May, and from July through November, or a total of 10 months. Direct mail continues to be a viable communication channel for FERA, with a response rate of over 5%.

Below are sample images of the FERA direct mailers.

60 See A23.04.003, Energy Resource Recovery Account (ERRA) Review Of Operations, 2022, Exhibit No: SCE-02, p. 181-184 (April 3, 2023).

RATE DISCOUNT APPLICATION

Source Code (Edison Use Only) ☐☐☐☐ – ☐☐☐☐

1 CUSTOMER INFORMATION:

Edison Service Account No. ☐☐☐☐☐☐☐☐☐☐

Your Name, as shown on Edison Bill (Su Nombre)

Your Home Address (Su Domicilio)

City (Ciudad) ZIP Code (Codigo Postal)

☐☐☐-☐☐☐-☐☐☐☐ ☐ Landline (Teléfono fijo) ☐ Cell phone (Teléfono celular)

Telephone (Teléfono)

Number of persons in my household (No. de personas en el hogar): ☐ Adults + ☐ Children = ☐ Total

I certify:

- The Edison bill is in my name.
- I am not claimed on another person's income tax return.
- I will renew my application when requested by Edison.
- I will notify Edison if I no longer qualify for this rate.
- I understand Edison reserves the right to verify my household's income.

2 PUBLIC ASSISTANCE PROGRAM ELIGIBILITY:

Do you or someone in your household participate in any of the following programs? If so, please check (✓) the program(s) below.

- ☐ Medi-Cal/Medicaid
- ☐ CalFresh/SNAP (Food Stamps)
- ☐ CalWorks (TANF)/Tribal TANF
- ☐ WIC
- ☐ Medi-Cal for Families (Healthy Families A & B)
- ☐ LIHEAP
- ☐ Supplemental Security Income (SSI)
- ☐ National School Lunch Program (NSLP)
- ☐ Bureau of Indian Affairs General Assistance
- ☐ Head Start Income Eligible (Tribal Only)

If you participate in any of the Public Assistance Programs in this section, then SKIP to Section 4.

3 INCOME ELIGIBILITY:

You will be enrolled in either the CARE or FERA program depending on your household income and household size.

Total combined gross annual household income (Ingresos totales al año): $ ☐☐☐,☐☐☐.00

For example: Current monthly income x 12 months = annual household income

The definition of "gross (before taxes) household income" is all money and noncash benefits, available for living expenses, from all sources, both taxable and nontaxable, before deductions, including expenses, for all people who live in my home. This includes, but is not limited to, the following:

Please check (✓) ALL sources of your household income.

- ☐ Pensions
- ☐ Social Security
- ☐ SSP or SSDI
- ☐ Interest or Dividends from Savings, Stocks, Bonds, or Retirement Accounts
- ☐ Wages and/or Profits from Self-Employment
- ☐ Unemployment Benefits
- ☐ Disability or Workers' Compensation Payments
- ☐ Rental or Royalty Income
- ☐ Scholarships, Grants, or Other Aid Used for Living Expenses
- ☐ Insurance or Legal Settlements
- ☐ Spousal or Child Support
- ☐ Cash and/or Other Income

4 DECLARATION: *(Please sign and date below)*

I state that the information I have provided in this application is true and correct. I understand that I may be requested to provide updated documentation of eligibility at any time and agree to do so regardless of how I initially became eligible for the discount. I agree to inform Southern California Edison Company if I no longer qualify to receive the discount. I understand that if I receive the discount without qualifying for it, I may be required to pay back the discount I received. I understand that SCE can share my information with other utilities or their agents to enroll me in their assistance programs.

✍ _____ ☐☐ ☐☐ ☐☐

Customer Signature (Firma del Cliente) Date (Fecha) MM/DD/YY

☐ Guardian or Power-of-Attorney
Provide notarized copy of document

I confirm the information provided is accurate, and agree to receive calls at the above number, through an automatic-dialing announcing device (ATDS), or a prerecorded message from, or on behalf of, Southern California Edison for rebates, savings, or other low-income qualified program information. I understand that consent to receiving these calls is not required to enroll in this income-qualified program and that message and data rates may apply.

SOLICITUD DE DESCUENTO EN LA TARIFA

Código de fuente (sólo para uso de Edison) ☐☐☐☐ – ☐☐☐☐

1 INFORMACIÓN DEL CLIENTE:

No. de cuenta de Servicio de Edison ☐☐☐☐☐☐☐☐☐☐

Su nombre, como figura en la factura de Edison

Su domicilio

Ciudad | Código postal

☐☐☐-☐☐☐-☐☐☐☐ ☐ Teléfono fijo ☐ Teléfono celular

Teléfono

No. de personas en el hogar: ☐ Adultos + ☐ Niños = ☐ Total

Certifico que:

- La factura de Edison está a mi nombre.
- No figuro en la declaración de impuestos sobre la renta de otra persona.
- Renovaré esta solicitud cuando Edison lo solicite.
- Notificaré a Edison si ya no califico para esta tarifa.
- Entiendo que Edison se reserva el derecho de verificar el ingreso de mi hogar.

2 ELEGIBILIDAD PARA EL PROGRAMA DE ASISTENCIA PÚBLICA:

¿Usted o alguien en su hogar participa en alguno de los siguientes programas? Si es así, por favor marque (✔) el programa o programas a continuación.

- ☐ Medi-Cal/Medicaid
- ☐ CalFresh/SNAP (Food Stamps)
- ☐ CalWorks (TANF)/Tribal TANF
- ☐ WIC
- ☐ Medi-Cal para familias (Healthy Families A&B)
- ☐ LIHEAP
- ☐ Supplemental Security Income (SSI)
- ☐ National School Lunch Program (NSLP)
- ☐ Bureau of Indian Affairs General Assistance
- ☐ Head Start: Elegibilidad según ingresos (solo tribal)

Si participa en cualquiera de los programas de asistencia pública en esta sección, PASE a la Sección 4.

3 ELEGIBILIDAD SEGÚN EL INGRESO:

Se le inscribirá en el programa CARE o en el programa FERA dependiendo del ingreso y el número de personas de su hogar.

Total de ingreso anual bruto combinado de su hogar: $ ☐☐☐,☐☐☐.00

Por ejemplo: Ingreso mensual actual x 12 meses = Ingreso anual del hogar

La definición de "ingreso bruto del hogar (antes de impuestos)" es todo el dinero y beneficios no en efectivo, disponibles para gastos de manutención, de todas las fuentes, tanto sujetos como no al pago de impuestos, antes de deducciones, incluyendo los gastos, para todas las personas que viven en mi casa. Esto incluye, de manera no limitativa, lo siguiente:

Marque (✔) TODAS las fuentes de ingreso del hogar.

- ☐ Pensiones
- ☐ Seguro Social
- ☐ SSP o SSDI
- ☐ Intereses o dividendos de ahorros, acciones, bonos o cuentas de jubilación
- ☐ Sueldo y/o ganancias de empleo independiente
- ☐ Beneficios por desempleo
- ☐ Pagos por discapacidad o compensaciones al trabajador por accidentes de trabajo
- ☐ Ingresos por alquileres o regalías
- ☐ Becas, subvenciones u otra ayuda utilizada para gastos de manutención
- ☐ Liquidaciones legales o de seguros
- ☐ Manutención de niños o del cónyuge
- ☐ Ingresos en efectivo y otros ingresos

4 DECLARACIÓN: *(Firme y ponga la fecha abajo)*

Declaro que la información que he proporcionado en esta solicitud es verdadera y correcta. Entiendo que se me podrá pedir que proporcione documentación actualizada de mi elegibilidad en cualquier momento y estoy de acuerdo en hacerlo independientemente de la manera en que inicialmente adquirí derecho a participar en el descuento. Acepto informar a Southern California Edison Company si ya no califico para recibir el descuento. Entiendo que si recibo el descuento sin reunir los requisitos para el mismo, se me podría exigir que devuelva el descuento que recibí. Entiendo que SCE puede compartir mi información con otras empresas de servicios públicos o sus agentes para inscribirme en sus programas de ayuda.

✍ _____ ☐☐ ☐☐ ☐☐

Firma del cliente | Fecha MM/DD/YY

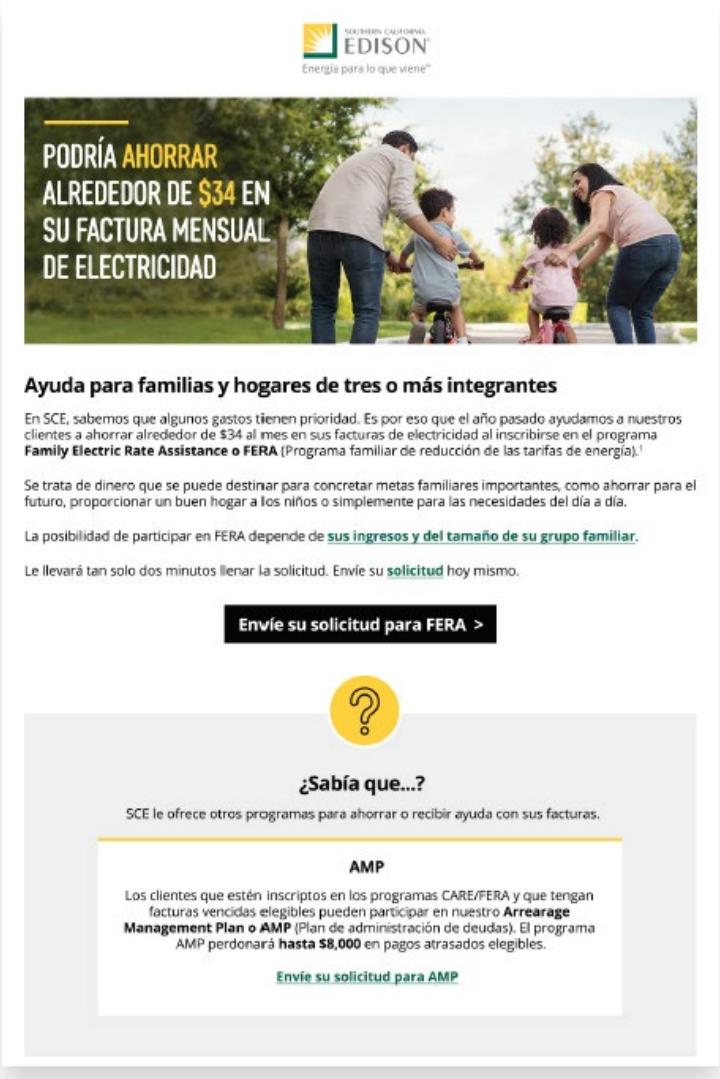
☐ Guardián o apoderado legal: proporcione copia notariada del documento

Confirmo que la información proporcionada es precisa, y acepto recibir llamadas en el número indicado anteriormente, a través de un dispositivo de marcación automática (ATDS) o un mensaje pregrabado de parte de o en nombre de Southern California Edison con descuentos, ahorros u otra información de programas dirigidos a usuarios de bajos ingresos. Entiendo que el consentimiento para recibir estas llamadas no es obligatorio para inscribirse en este programa basado en los ingresos y que podrían aplicarse tarifas de mensajería y datos.

Emails

In 2022, SCE sent over 1.5 million emails to potential FERA customers. SCE updated the emails in May to include a new design in keeping with all FERA communications. The open rate for all emails averaged over 57.6%, with a 3.47 % click rate. The open rate in 2022 was higher than the open rate in 2021. The top click in the email is the income link at 2.5%.

Below are sample images of SCE's FERA emails.



Mass Media

Beginning in July and through December, SCE ran a media campaign consisting of Social, Programmatic Banner Ads and Search. The campaign covered the full SCE territory. The campaign ran in both English and Spanish. Combined CARE and FERA search ran in English only. This multi-channel campaign delivered reach and engagement. While Programmatic enabled the ability to scale and reach, most of the performance driven metrics (clicks and actions taken) were through Social and Search. FERA campaign impressions totaled over 27 million, with over 31,800 clicks, and a click through rate (CTR) of 2.5%.

4.3.2 Discuss Each of the Following:

4.3.2.1 How FERA customer data and other relevant program information is shared within the utility, for example, between its Energy Savings Assistance Program and other appropriate low-income programs.

Since the ESA program had to limit its enrollments at the latter half of 2022, there was no FERA customer outreach. SCE plans to prioritize FERA customers in 2023 for the ESA program.

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

There are several factors that have created barriers to increasing participation in the FERA program, some of which include:

- Offering CARE and FERA on one enrollment form often encourages FERA-targeted customers to apply for the lower CARE discount,
- Customers may under-report income in order to receive the higher CARE 30% discount on their utility bills instead of the FERA 18% discount, and
- Customers who are categorically eligible—that is, who enroll through participation in a program which automatically qualifies them for CARE—may qualify for the FERA program without knowing it.

In August of 2022, SCE's FERA team participated in the first of an ongoing series of quarterly meetings with the ED and other electric IOUs which focus on FERA program barriers and mitigation strategies. Through thoughtful and transparent collaboration with all parties, three new ideas were proposed and are under consideration:

- Auto-enrollment of high probability FERA-eligible customers
- Implementation of a new FERA barriers study
- Incentives for FERA enrollment and/or referrals

SCE will continue to meet quarterly with the ED and other electric IOUs to discuss the feasibility of these proposals and continue to explore other mitigation options.

4.4 Processing FERA Applications[61]

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

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

See data contained in Excel Reporting Appendix - FERA Table 4.

4.4.2 Processing Random Post-Enrollment Verification Requests

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

See data contained in Excel Reporting Appendix - FERA Table 5.

4.5 Program Management

4.5.1 Discuss Issues and/or Events That Significantly Affected Program Management In the Reporting Period and How These Were Addressed.

FERA experienced the same impacts as CARE described in ***Section 3.3.1***.

4.5.2 Post Enrollment Verification to Provide Proof of Income.

In 2022, SCE experienced times where the processing of Post Enrollment Verification documents, which includes the intake, review, and input of customer eligibility documents, became backlogged due to timely, manual processes. In these cases, SCE issued PEV customers extensions to allow for additional processing times.

[61] The SCE FERA Application is a part of the Bill Discount Application that includes CARE.

5. FUND SHIFTING

5.1 Report ESA Program fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

During 2022, SCE shifted ESA funds laid out in Section 10.5.8.2 of D.21-06-015. SCE shifted funds from the following line items:

- Training Center
- Inspection
- Marketing and Outreach
- Regulatory Compliance
- General Administration
- CPUC Energy Division

These line items are considered "below the line" items and were shifted to the Energy Efficiency line item or "above the line." This was done in order to accommodate enrollment and installation of customers. A total of $4,223,739 was shifted from the listed "below the line" items to Energy Efficiency.

Since not all installations and other program transition work was completed in 2022, SCE committed these funds in order to continue providing the services to the customer. In total, SCE committed $9,218,270 to be able to complete this work.

The following work was considered as committed work:

1. Accruals from 2022 – This was enrollment and installation work completed in 2022 but was not able to be billed by December 31, 2022. The accruals also include work from MF CAM.
2. Contractor surcharge payments – SCE provided contractors a surcharge to assist in rising logistics and gasoline charges in order to complete enrollment and installation work in 2022.
3. Installation work that could not be completed in 2022 – Not all customers who were enrolled in 2022 received their services in the same year. This installation work has been assigned to contractors to complete in 2023. Many of this work are HVAC related services, such as Central A/C replacement and Smart Thermostat installations.
4. Inspections to be completed for 2022 work – Since installations for 2022 work has not been completed, the inspections for this work have also been committed.
5. Tribal Grants – SCE was able to sign agreements with various tribal governments however was unable to process the grants work in 2022. The grants were then committed.
6. SCE's system transition – SCE had originally planned for launching its new program system in January 2023. However, since the requirements of the system was updated, SCE moved the launch date to July 2023. SCE then committed funds for system creation.

The table below shows the following commitments and carry forward amounts for 2022.

ESA Program:	Budget	Spend	Remaining	Total Commitments	Total Carry Forward	Fund Shift within Prog. Yr	Remaining 2022 Budget
Energy Efficiency TOTAL	**$52,879,012**	**$48,614,595**	**$4,264,416**	**$8,458,254**	**$ -**	**$4,198,837**	**$ -**
Training Center	$ 600,650	$57,676	$542,974	$ -	$ -	$(542,974)	$ -
Inspections	$1,677,406	$1,053,187	$ 624,219	$102,803	$ -	$(521,416)	$ -
Marketing and Outreach	$1,374,878	$352,916	$1,021,962	$52,000	$ -	$(969,962)	$ -
Studies	$225,000	$74,861	$150,139	$ -	$150,139	$ -	$ -
Regulatory Compliance	$691,730	$539,008	$152,722	$ -	$ -	$(152,722)	$ -
General Administration	$6,218,785	$3,732,778	$2,486,007	$450,000	$ -	$(2,036,007)	$ -
CPUC Energy Division	$51,579	$50,921	$658	$ -	$ -	$(658)	$ -
BELOW THE LINE TOTAL	**$10,840,028**	**$5,861,347**	**$4,978,681**	**$604,803**	**$150,139**	**$(4,223,739)**	$ -
TOTAL PROGRAM COSTS	**$63,719,040**	**$54,475,942**	**$9,243,098**	**$9,063,057**	**$150,139**	**$(29,902)**	$ -
MF CAM	$1,800,000	$1,724,371	$75,629	$105,531	$ -	$ 29,902	$ -
Building Electrification Pilot	$4,087,060	$123,402	$3,963,658	$ -	$3,963,658	$ -	$ -
Clean Energy Home Pilot	$1,810,000	$37,298	$1,772,702	$38,552	$1,734,150	$ -	$ -
ESA Pilot Plus and Pilot Deep	$3,884,864	$294,411	$3,590,453	$11,131	$3,579,322	$ -	$ -
TOTAL PORTFOLIO COSTS	**$75,300,964**	**$56,655,423**	**$ 18,645,541**	**$9,218,270**	**$9,427,270**	**$ -**	**$ -**

SCE's committed funds will be used in 2023. For the annual report for PY 2023, SCE will provide actuals to the committed funds. For installations that were committed, the savings from the measures installed will be added to 2022 so that it aligns with the year the budget is from. Furthermore, SCE plans to provide an update in the third quarter of 2023 on the status of the use of these committed funds.

5.1.1 Report CARE Program fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

During 2022, SCE shifted CARE funds within the rules laid out in Section 10.5.8.2 of D.21-06-015. SCE shifted $177,948 from Outreach category to Post Enrollment Verification and $32,286 carried forward from 2021 to Measurement & Evaluation.

5.1.2 Report FERA Program fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

During 2022, SCE shifted FERA funds within the rules laid out in Section 10.5.8.2 of D.21-06-015. SCE shifted $141,530 from Processing, Certification, Recertification to Outreach.

5.1.3 Was there any ESA Program, CARE Program or FERA Program fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 10.5.8.2 of D.21-06-015?

There was no ESA, CARE, or FERA program fund shifting activity that occurred in 2022 that fell outside of the fund shifting guidelines in Section 10.5.8.2 of D.21-06-015.

6. COMMONLY USED ACRONYMS

ACRONYM	TERM
ACS	Census American Community Survey
AMP	Arrearage Management Plan
ASL	American Sign Language
BE	Building Electrification
CAEECC	California Energy Efficiency Coordinating Committee
CARE	California Alternate Rates for Energy
CAS	Concurrent Application Process System
CBA	Care Balancing Account
CBO	Community-Based Organization
CCC	Customer Contact Center
CE SWG	Cost Effectiveness Statewide Working Group
CEH	Clean Energy Home
CETF	California Emerging Technology Fund
CHANGES	Community Help and Awareness with Natural Gas And Electricity Services
CMHP	Comprehensive Mobile Home Program (Manufactured)
CPUC	California Public Utilities Commission
CSD	California Department of Community Services & Development
CTR	Click Through Rate
CWR	Community Workforce Resources
CZ	Climate Zone
D.	Decision
DAC	Disadvantage Communities
DR	Demand Response
ED	Energy Division
EE	Energy Efficiency
EMAPS	Existing Program Database
ESA	Energy Savings Assistance
EM&V	Evaluation, Measurement and Verification
EUI	Energy Use Intensity
FBO	Faith-Based Organization
FERA	Family Electric Rate Assistance
FERABA	FERA Balancing Account

ACRONYM	TERM
FPG	Federal Poverty Guidelines
GHG	Greenhouse Gas
GTSR	Green Tariff Shared Renewable
HER	Home Energy Report
HFRA	High Fire Risk
HHS	Health And Human Services
HU PEV	High Usage Post Enrollment Verification
HVAC	Heating, Ventilation, and Air Conditioning
IOU	Investor-Owned Utility
IS	Installation Standards
IT	Information Technology
kWh	Kilowatt Hour
LEP	Limited English Proficient
LIHEAP	Low Income Home Energy Assistance Program
LINA	Low Income Needs Assessment
LIOB	Low-Income Oversight Board
LIWP	Low-Income Weatherization Program
LSP	Local Service Provider
MASH	Multifamily Affordable Solar Housing
MBL	Medical Baseline
ME&O	Marketing, Education, And Outreach
MF CAM	Multifamily Common Area Measure Program
MFWB	Multi-Family Whole Building
MH	Mobile-Home
MHP	Mobile Home Park Conversion
NEBs	Non-Energy Benefits
NEI	Non-Energy Impacts
NMEC	Normalized Metered Energy Consumption
OP	Ordering Paragraph
PDA	Public Documents Area
PEV	Post Enrollment Verification
PG&E	Pacific Gas & Electric Company
PIP	Program Implementation Plan
PP	Policy And Procedures

ACRONYM	TERM
PP/D	Pilot Plus/Deep
PPPAM	Public Purpose Program Adjustment Mechanism
PSPS	Public Safety Power-Shutoff
PUMS	Public Use Microdata Sample
PY	Program Year
RASS	Residential Appliance Saturation Surveys
RDI	Residential Direct Install
RFP	Request For Proposal
RI	Research Innovations
RTR	Response-To-Recommendation
SASH	Single Family Affordable Solar Home
SB	Senate Bill
SCE	Southern California Edison
SDG&E	San Diego Gas & Electric Company
SDP	Summer Discount Plan
SEP	Smart Energy Program
SEVI	Socioeconomic Vulnerability Index
SF	Single-Family
SF3	Summary File 3
SoCalGas	Southern California Gas Company
SOMAH	Solar On Multi-Family Affordable Housing
SRP	Summer Reliability Program
SSI	Supplemental Security Income
SWG	Sub-Working Group
UAS	Universal Application System
WG	Working Group
WMDVBE	Women, Minority, Disabled Veteran, or Business Enterprise

Appendix A

ESA, CARE, and FERA Program Tables

Summary Highlights – ESA, CARE, and FERA Programs

ESA Program Summary Table 1 – Overall Program Expenses and Energy and Demand Savings

ESA Program – Table 1 – ESA Main Overall Program Expenses

ESA Program – Table 1A – MFWB Program Expenses

ESA Program – Table 1A-1 – Pilot Plus and Pilot Deep Program Expenses

ESA Program – Table 1A-2 – Building Electrification Program Expenses

ESA Program – Table 1A-3 – Clean Energy Homes Program Expenses

ESA Program – Table 1A-4 – CSD Leveraging Program Expenses

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

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

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

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

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

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

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

ESA Program – Table 3 – Cost Effectiveness

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

ESA Program – Table 5 – Direct Purchases & Installation Contractors

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

ESA Program – Table 7 – Expenditures by Cost Elements

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

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

ESA Program – Table 9A – MF CAM - Life Cycle Bill Savings by Measure

ESA Program – Table 9B – Pilot Plus and Pilot Deep - Life Cycle Bill Savings by Measure

ESA Program – Table 9C – Building Electrification - Life Cycle Bill Savings by Measure

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

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

ESA Program – Table 12 – Fund Shifting

ESA Program – Table 13 – Categorical Enrollment

ESA Program – Table 14 – Leveraging and Integration

ESA Program – Table 14A – Clean Energy Referral, Leveraging, and Coordination

ESA Program – Table 15 – Expenditures for Pilots and Studies

ESA Program – Table 16 – ESAP Tribal Outreach

ESA Program – Table 17 – Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions

CARE Program – Table 1 – CARE Overall Program Expenses

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

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

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

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

CARE Program – Table 5 – Enrollment by County

CARE Program – Table 6 – Re-certification Results

CARE Program – Table 7 – Capitation Contractors

CARE Program – Table 8 – Participants per Month

CARE Program – Table 9 – Average Monthly Usage & Bill

CARE Program – Table 10 – CARE Surcharge & Revenue

CARE Program – Table 11 – CARE Capitation Applications

CARE Program – Table 12 – CARE Expansion Program

CARE Program – Table 13 – CARE High Usage Verification Results

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

CARE Program – Table 14 – CARE Categorical Enrollment

CARE Program – Table 15 – CARE and Disadvantage Communities Enrollment Rate for ZIP Codes

FERA Program – Table 1 – FERA Overall Program Expenses

FERA Program – Table 2 – FERA Enrollment, Re-certification, Attrition, and Enrollment Rate

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

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

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

FERA Program – Table 5 – Enrollment by County

FERA Program – Table 6 – Re-certification Results

FERA Program – Table 7 – Capitation Contractors

FERA Program – Table 8 – Average Monthly Usage & Bill

FERA Program – Table 9 – CARE Surcharge & Revenue

Southern California Edison
Energy Savings Assistance Program California Alternate Rates for Energy Program And Family Electric Rate Assistance Program

2022 Summary Highlights

ESA Program

2022 Energy Savings Assistance Program Summary [1]			
2022	**Authorized / Forecasted Planning Assumptions**	**Actual**	**%**
Budget	$ 73,500,964	$ 54,931,052	75%
Funded from 2009-2016 Unspent Funds [2]	$ 1,800,000	$ 1,724,371	96%
Summary Homes Treated	27,051	35,652	132%
Summary kWh Saved	18,788,420	19,468,044	104%
Summary kW Demand Reduced	7,147	2,721	38%
Summary Therms Saved	NA	NA	NA

[1] This includes all programs for the reporting period Main ESA, MF In-Unit, MF CAM, MFWB, Pilot Plus and Pilot Deep, Building Electrification, Clean Energy Homes, CSD Leveraging.

[2] Unspent funds is only applicable to MF CAM. Decision 21-06-015 directs the IOUs to use unspent and uncommitted MF CAM funds for program years 2022 and 2023 until transition to the Multifamily Whole Building program is implemented.

CARE Program

2022 CARE Program Summary			
2022	**Authorized Budget**	**Actual**	**%**
Administrative Expenses	$ 8,822,256	$ 7,376,652	84%
Subsidies	$ 404,343,437	$ 666,223,958	165%
Service Establishment Charge	$ -	$ -	n/a
Total Program Costs and Discounts	**$ 413,165,693**	**$ 673,600,610**	163%
2022 CARE New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc**	**Self Certified as Income or Categorically Eligible**	**Self Certified as Recertification**
Method	3,353	350,793	273,818
2022 CARE-Enrollment Rate	**Estimated Eligible Participants**	**Participants**	**Enrollment Rate**
Total Enrolled	1,276,922	1,165,186	91%

FERA Program

2022 FERA Program Summary			
2022	**Authorized Budget**	**Actual**	**%**
Administrative Expenses	$ 1,286,280	$ 876,673	68%
Subsidies	$ 28,746,536	$ 11,482,677	40%
Service Establishment Charge	$ -	$ -	n/a
Total Program Costs and Discounts	**$ 30,032,816**	**$ 12,359,350**	41%
2022 FERA New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc**	**Self Certified as Income or Categorically Eligible**	**Self Certified as Recertification**
Method	3	10,685	4,890
2022 FERA-Enrollment Rate	**Estimated Eligible Participants**	**Participants**	**Enrollment Rate**
Total Enrolled	221,674	26,112	12%

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual Report
Summary Table 1 Expenses

	Authorized Budget			Year to Date Expenses [6]			% of Budget Spent YTD		
ESA Program:	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
ESA Main Program (SF and MH)[1]	$ 63,719,040		$ 63,719,040	$ 54,475,942		$ 54,475,942	85%		85%
ESA Multifamily In-Unit [2]			$ -	$ -		$ -	0%		0%
ESA Multifamily Common Area Measures	$ 1,800,000		$ 1,800,000	$ 1,724,371		$ 1,724,371	96%		96%
ESA Multifamily Whole Building [3]	$ -		$ -	$ -		$ -	0%		0%
ESA Pilot Plus and Pilot Deep	$ 3,884,864		$ 3,884,864	$ 294,411		$ 294,411	8%		8%
Building Electrification Retrofit Pilot [4]	$ 4,087,060		$ 4,087,060	$ 123,402		$ 123,402	3%		3%
Clean Energy Homes New Construction Pilot [4]	$ 1,810,000		$ 1,810,000	$ 37,298		$ 37,298	2%		2%
CSD Leveraging	$ -		$ -	$ -		$ -	0%		0%
SASH and MASH Unspent Funds [5]							0%		0%
ESA Program TOTAL	**$ 75,300,964**	**$ -**	**$ 75,300,964**	**$ 56,655,423**	**$ -**	**$ 56,655,423**	75%		75%

[1] Budget for PY 2022 for entire portfolio, including ESA Main and MF in-unit.
[2] ESA Multifamily In-Unit authorized and actual costs are included in the ESA Main Program category.
[3] Implementation to occur no earlier than July 2023.
[4] Pilots are applicable to SCE only. Expected to launch in 2023.
[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 Advice Letter.
[6] Table does not include SCE's commitments of $9,218,270. A detailed breakout of the committed work is included in Section 6 of the Low Income Annual Report.

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual Report
Summary Energy and Demand Savings

	Authorized / Forecasted Planning Assumptions			Actual			%		
ESA Program:	**kWh**	**kW**	**Therms**	**kWh**	**kW**	**Therms**	**kWh**	**kW**	**Therms**
ESA Main Program (SF and MH)[1]	18,788,420	7,147		18,082,438	2,687		96%	38%	
ESA Multifamily In-Unit [2]							0%	0%	
ESA Multifamily Common Area Measures				1,385,607	33.98		0%	0%	
ESA Multifamily Whole Building [3]							0%	0%	
ESA Pilot Plus and Pilot Deep							0%	0%	
Building Electrification Retrofit Pilot [4]							0%	0%	
Clean Energy Homes New Construction Pilot [4]							0%	0%	
CSD Leveraging							0%	0%	
ESA Program TOTAL	**18,788,420**	**7,147**		**19,468,044**	**2,721.08**		104%	38%	

[1] Energy and demand savings for PY 2022 includes ESA Main and MF in-unit.
[2] The ESA Multifamily In-Unit energy and demand savings are included in the ESA Main Program category.
[3] Implementation to occur no earlier than July 2023.
[4] Pilots are applicable to SCE only.

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual Report - Main (SF, MH, MF In-Unit)
ESAP Table 1
ESAP Overall Program Expenses

	2022 Authorized / Forecasted Budget			2022 Annual Expenses [3]			% of Budget Spent		
ESA Program:	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
Energy Efficiency									
Energy Efficiency	$ 38,151,624		$ 38,151,624			$ -			
AL 4702-E Approved Budget [2]	$ 14,727,388		$ 14,727,388			$ -			
Appliances			$ -	$ 11,940,332		$ 11,940,332			
Domestic Hot Water			$ -	$ 6,058		$ 6,058			
Enclosure			$ -	$ 732,350		$ 732,350			
HVAC			$ -	$ 27,945,996		$ 27,945,996			
Maintenance			$ -	$ -		$ -			
Lighting			$ -	$ 960,154		$ 960,154			
Miscellaneous			$ -	$ 3,293,268		$ 3,293,268			
Customer Enrollment			$ -	$ 2,889,409		$ 2,889,409			
In Home Education			$ -	$ 847,028		$ 847,028			
Pilot			$ -	$ -		$ -			
Energy Efficiency TOTAL	**$ 52,879,012**	**$ -**	**$ 52,879,012**	**$ 48,614,595**	**$ -**	**$ 48,614,595**	**92%**		**92%**
Training Center	$ 600,650		$ 600,650	$ 57,676		$ 57,676	10%		10%
Inspections	$ 1,677,406		$ 1,677,406	$ 1,053,187		$ 1,053,187	63%		63%
Marketing and Outreach	$ 1,374,878		$ 1,374,878	$ 352,916		$ 352,916	26%		26%
Statewide Marketing Education and Outreach			$ -			$ -	0%		0%
Measurement and Evaluation Studies	$ 225,000		$ 225,000	$ 74,861		$ 74,861	33%		33%
Regulatory Compliance	$ 691,730		$ 691,730	$ 539,008		$ 539,008	78%		78%
General Administration	$ 6,218,785		$ 6,218,785	$ 3,732,778		$ 3,732,778	60%		60%
CPUC Energy Division	$ 51,579		$ 51,579	$ 50,921		$ 50,921	99%		99%
Administration Subtotal	**$ 10,840,028**	**$ -**	**$ 10,840,028**	**$ 5,861,347**	**$ -**	**$ 5,861,347**	54%		54%
TOTAL PROGRAM COSTS	**$ 63,719,040**	**$ -**	**$ 63,719,040**	**$ 54,475,942**	**$ -**	**$ 54,475,942**	**85%**		**85%**
Funded Outside of ESA Program Budget									
Indirect Costs				$ 1,038,009		$ 1,038,009			
NGAT Costs									

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

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

[3] Table does not include SCE's commitments of $9,218,270. A detailed breakout of the committed work is included in Section 6 of the Low Income Annual Report.

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 1A

ESA Table 1A - Multifamily Whole Building Expenses

ESA Program (MFWB):	2022 Authorized / Forecasted Budget			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Multifamily In-Unit [1]			$ -	$ -		$ -	0%		0%
ESA Multifamily Common Area Measures	$ 1,800,000		$ 1,800,000	$ 1,724,371		$ 1,724,371	96%		96%
ESA Multifamily Whole Building [2]			$ -	$ -		$ -	0%		0%
TOTAL	**$ 1,800,000**	**$ -**	**$ 1,800,000**	**$ 1,724,371**	**$ -**	**$ 1,724,371**			96%

[1] Budget is included in ESA Main Program.
[2] Implementation to occur no earlier than July 2023.

ESA Table 1A-1 - Pilot Plus and Pilot Deep Expenses

	2022 Authorized / Forecasted Budget			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Pilot Plus and Pilot Deep Program	$ 3,884,864		$0	$294,411	$ -	$ 294,411	8%		0%
TOTAL	**$ 3,884,864**	**$ -**	**$ -**	**$ 294,411**	**$ -**	**$ 294,411**	8%		0%

ESA Table 1A-2 - Building Electrification Expenses [3][4]

	2022 Authorized / Forecasted Budget			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Building Electrification Program	$ 4,087,060		$ 4,087,060	$123,402	$ -	$ 123,402	3%		3%
TOTAL	**$ 4,087,060**	**$ -**	**$ -**	**$ 123,402**	**$ -**	**$ 123,402**	3%		0%

[3] Pilot is applicable to SCE only.
[4] Implementation to occur no earlier than January 2023.

ESA Table 1A-3 - Clean Energy Homes Expenses [3][5]

	2022 Authorized / Forecasted Budget			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Clean Energy Homes Program	$ 1,810,000		$ 1,810,000	$37,298	$ -	$ 37,298	2%		2%
TOTAL	**$ 1,810,000**	**$ -**	**$ -**	**$ 37,298**	**$ -**	**$ 37,298**	2%		0%

[3] Pilot is applicable to SCE only.
[4] Implementation to occur no earlier than April 2023.

ESA Table 1A-4 - Leveraging - CSD Expenses

	2022 Authorized / Forecasted Budget			2022 Annual Expenses			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Program Leveraging - CSD	$ -		$ -	$ -	$ -	$ -	0%		0%
TOTAL	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	0%		0%

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 2
ESAP Main Expenses and Energy Savings by Measures Installed (SF, MH, MF In-Unit)

				ESA Program Main Total					
				2022 Completed & Expensed Installation					
Measures	Basic	Plus	Units	Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses ($)	% of Expenditures
Appliances									
High Efficiency Clothes Washer		x	Home	25	2,441	0		$ 25,642	0.1%
Refrigerator	x		Home	10,223	5,971,066	717		$ 14,191,335	28.2%
Microwave	NA	NA	Each						0.0%
New - Freezer		x	Each	199	168,752	20		$ 173,808	0.3%
Domestic Hot Water									
Other Domestic Hot Water [5]	x		Home	95	5,406	1		$ 3,895	0.0%
Water Heater Tank and Pipe Insulation		x	Home	1	47	0		$ 34	0.0%
Water Heater Repair/Replacement	NA	NA	Each						0.0%
Combined Showerhead/TSV	x		Each						0.0%
New - Heat Pump Water Heater		x	Each						0.0%
New - Tub Diverter/ Tub Spout	NA	NA	Each						0.0%
New - Thermostat-controlled Shower Valve	x		Each	22	1,003	0		$ 1,892	0.0%
Enclosure									
Air Sealing [1]		x	Home	95	6,566	1		$ 14,160	0.0%
Caulking	NA	NA	Home						0.0%
Attic Insulation		x	Home	2	430	0		$ 2,468	0.0%
HVAC									
FAU Standing Pilot Conversion	NA	NA	Home						0.0%
Furnace Repair/Replacement	NA	NA	Home						0.0%
Room A/C Replacement		x	Home	192	(29,637)	(4)		$ 207,641	0.4%
Central A/C replacement		x	Home	3,615	1,234,486	185		$ 21,905,755	43.5%
Heat Pump Replacement		x	Home	73	92,458	42		$ 438,524	0.9%
Evaporative Cooler (Replacement)		x	Home						0.0%
Evaporative Cooler (Installation)		x	Home	2,812	1,576,971	237		$ 3,652,282	7.3%
Duct Test and Seal	NA	NA	Home	3,421	-	-		$ 715,040	1.4%
New - Energy Efficient Fan Control		x	Home	47	3,206	2		$ 14,805	0.0%
New - Prescriptive Duct Sealing	NA	NA	Home						0.0%
New - High Efficiency Forced Air Unit (HE FAU)	NA	NA	Home						0.0%
New - A/C Time Delay	NA	NA	Home						0.0%
New - Smart Thermostat	X		Home	3,215	889,549	-		$ 1,011,949	2.0%
Maintenance									
Furnace Clean and Tune	NA	NA	Home						0.0%
Central A/C Tune up		x	Home						0.0%
Lighting									
Compact Fluorescent Lights (CFL)	x		Each	(4)	(69)	(0)		$ (28)	0.0%
Interior Hard wired LED fixtures	NA	NA	Each						0.0%
Exterior Hard wired LED fixtures	x		Each	87	1,271	-		$ 8,124	0.0%
LED Torchiere	x		Each	2,886	206,360	24		$ 203,518	0.4%
Occupancy Sensor		NA	Each						0.0%
LED Night Light		NA	Each						0.0%
LED Reflector Lamp	x		Each	1,186	25,263	3		$ 9,714	0.0%
New - LED R/BR Lamps	x		Each						0.0%
New - LED A-Lamps	x		Each	83,212	3,220,076	391		$ 738,826	1.5%
Miscellaneous									
Pool Pumps		x	Home	984	983,983	305		$ 1,295,749	2.6%
Smart Strip	x		Home	22	(24)	(0)		$ 1,198	0.0%
Smart Strip Tier II	x		Each	26,612	3,722,835	764		$ 1,993,612	4.0%
Pilots									
Customer Enrollment [8]									
ESA Outreach & Assessment			Home	39,617	-	-		$ 2,883,617	5.7%
ESA In-Home Energy Education			Home	33,877	-	-		$ 846,950	1.7%
Total Savings/Expenditures					18,082,438	2,687	-	$ 50,340,509	100.0%
Total Households Weatherized [2]				130					
Households Treated			Total						
- Single Family Households Treated			Home	25,187					
- Multi-family Households Treated			Home	8,274					
- Mobile Homes Treated			Home	2,191					
Total Number of Households Treated			Home	35,652					
# Eligible Households to be Treated for PY [3]			Home	27,051					
% of Households Treated			%	132%					
- Master-Meter Households Treated			Home	1,783					

			Year to Date Expenses			
ESA Program - Main			**Electric**	**Gas**	**Total**	
Administration					$ -	
Direct Implementation (Non-Incentive)					$ -	
Direct Implementation			$ 50,340,509		$ 50,340,509	*<<Includes measures costs*
TOTAL ESA Main COSTS			$ 50,340,509	$ -	$ 50,340,509	

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping , 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, caulking, & minor home repairs.

[3] Based on D.21-06-015 Attachment 1, Table 6 targets.

[4] Savings estimates are sourced from SCE's ex ante analysis of the 2015-2017 ESA Impact Evaluation results, or SCE/SW Workpapers.

[5] Other Domestic Hot Water includes the following parts: Faucet Aerator and Low Flow Showerhead.

Southern California Edison
2022 Energy Savings Assistance Program Annual Report
ESAP Table 2A
Multifamily Common Area Measures Initiative Expenses and Energy Savings by Measures Installed

ESA Program - Multifamily Common Area Measures								
ESA MF CAM Measures [5][6]	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTUh and Cap-Tons	kWh (Annual) [1]	kW (Annual) [1]	Therms (Annual)	Expenses ($)	% of Expenditure
Appliances								
MF Refrigerators	Each	2		1,212	0.145		$ 2,752	0.2%
Domestic Hot Water								
Central Boiler	Cap-kBTUh	-	-	-	-	-	$ -	0.0%
Faucet Aerator	Each	-	-	-	-	-	$ -	0.0%
Pipe Insulation	Home	-	-	-	-	-	$ -	0.0%
Envelope								
								0.0%
HVAC								
MF Central A/C Replacement	Home	6	-	1,704	0.256	-	$ 50,478	2.9%
MF Duct Test Inspection	Each	3	-	-	-	-	$ 315	0.0%
MF Duct Testing and Sealing	Home	6	-	-	-	-	$ 2,830	0.2%
MF Heat Pump Replacement	Home	1	-	1,636	0.736	-	$ 15,818	0.9%
MF Inspection	Each	17	-	-	-	-	$ 3,570	0.2%
MF Smart Thermostat	Each	32		8,306	-		$ 7,675	0.4%
Lighting								
MF Ext Parking Lot	Each	1,328	-	384,178	-	-	$ 172,237	10.0%
MF LED A-Lamp	Each	791	-	180,809	3.59	-	$ 8,683	0.5%
MF LED Exit Sign	Each	186	-	67,024	10.85	-	$ 16,767	1.0%
MF LED Exterior Fixture	Each	6,956	-	368,333	-	-	$ 857,652	49.7%
MF LED Interior Fixture	Each	5,598	-	123,218	14.32	-	$ 521,810	30.3%
MF LED PL-Lamps	Each	1,327	-	101,463	1.04	-	$ 14,888	0.9%
MF LED Pool and Spa Lighting	Each	3	-	2,628	-	-	$ 1,449	0.1%
MF LED Reflector Lamp	Each	279	-	2,724	0.03	-	$ 1,824	0.1%
MF LED T-Lamp	Each	2,332	-	114,656	1.87	-	$ 22,928	1.3%
Miscellaneous								
Tier-2 Smart Power Strip	Each	-	-	-	-	-	$ -	0.0%
MF Pool Pumps	Each	3	-	27,717	1.16	-	$ 7,310	0.4%
Enrollment Fees								
Enrollment Fees	Each	37	-	-	-	-	$ 15,386	0.9%
Ancillary Services								
Audit [4]		-	-	-	-	-	$ -	0.0%
Total		18,907	-	1,385,607	33.98	-	$ 1,724,371	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated[2]	44
Subtotal of Master-metered Multifamily Properties Treated	3
Total Number of Multifamily Tenant Units w/in Properties Treated[3]	44
Total Number of buildings w/in Properties Treated	3,979

Multifamily Households Treated (In-Unit)	Number
Total Number of households individually treated (in-unit)	785

	Year to Date Expenses			
ESA Program - MF CAM	Electric	Gas	Total	
Administration			$ -	
Direct Implementation (Non-Incentive)			$ -	
Direct Implementation	$ 1,724,371		$ 1,724,371	*<<Includes measures costs*
TOTAL MF CAM COSTS	$ 1,724,371	$ -	$ 1,724,371	

[1] 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.

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

[3] Multifamily tenant units are the number of dwelling units located within properties treated. This number does not represent the same number of dwellings treated as captured in table 2A.

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

[5] Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022, modified by D.17-12-009, where 65% of tenants are income eligible based (at or below 200% of the Federal Poverty Guidelines).

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

ESAP Table 2B
Multifamily Whole Building Expenses and Energy Savings by Measures Installed

	ESA Program - Multifamily Whole Building							
		Year-To-Date Completed & Expensed Installation						
ESA MFWB Measures[1]	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTUh and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses ($)	% of Expenditure
Appliances								
Domestic Hot Water								
Central Boiler**	Cap-kBTUh	-	-	-	-	-	$ -	
Faucet Aerator	Each	-	-	-	-	-	$ -	
Pipe Insulation	Home	-	-	-	-	-	$ -	
Envelope								
HVAC								
AC Tune-up**	Cap-Tons	-	-	-	-	-	$ -	
Furnace Replacement**	Cap-kBTUh	-	-	-	-	-	$ -	
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 [5]								
Audit[4]		-	-	-	-	-	$ -	
Total	-	-	-	-	-	-	$ -	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated[2]	0
Subtotal of Master-metered Multifamily Properties Treated	0
Total Number of Multifamily Tenant Units w/in Properties Treated[3]	0
Total Number of buildings w/in Properties Treated	0

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

<<Includes measures costs

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

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual Report ESAP Table 2C
ESAP Expenses and Energy Savings by Measures Installed - Pilot Plus and Pilot Deep

	ESA Program - Pilot Plus							ESA Program - Pilot Deep						
		2022 Completed & Expensed Installation							2022 Completed & Expensed Installation					
Measures	**Units (Each or Home)**	**Quantity Installed**	**kWh [4] (Annual)**	**kW [4] (Annual)**	**Therms [4] (Annual)**	**Expenses ($)**	**% of Expenditures**	**Units (Each or Home)**	**Quantity Installed**	**kWh [4] (Annual)**	**kW [4] (Annual)**	**Therms [4] (Annual)**	**Expenses ($)**	**% of Expenditures**
Appliances														
High Efficiency Clothes Washer	Each						0.0%	Each						0.0%
Refrigerator	Each						0.0%	Each						0.0%
Microwave	Each						0.0%	Each						0.0%
New - Freezer	Each						0.0%	Each						0.0%
Domestic Hot Water														
Other Domestic Hot Water [5]	Home						0.0%	Each						0.0%
Water Heater Tank and Pipe Insulation	Home						0.0%	Each						0.0%
Water Heater Repair/Replacement	Each						0.0%	Each						0.0%
Combined Showerhead/TSV	Each						0.0%	Each						0.0%
New - Heat Pump Water Heater	Each						0.0%	Each						0.0%
New - Tub Diverter/ Tub Spout	Each						0.0%	Each						0.0%
New - Thermostat-controlled Shower Valve	Each						0.0%	Each						0.0%
Enclosure														
Air Sealing	Home						0.0%	Each						0.0%
Caulking	Home						0.0%	Each						0.0%
Attic Insulation	Home						0.0%	Each						0.0%
HVAC														
FAU Standing Pilot Conversion	Each						0.0%	Each						0.0%
Furnace Repair/Replacement	Each						0.0%	Each						0.0%
Room A/C Replacement	Each						0.0%	Each						0.0%
Central A/C replacement	Each						0.0%	Each						0.0%
Heat Pump Replacement	Each						0.0%	Each						0.0%
Evaporative Cooler (Replacement)	Each						0.0%	Each						0.0%
Evaporative Cooler (Installation)	Each						0.0%	Each						0.0%
Duct Test and Seal	Home						0.0%	Each						0.0%
New - Energy Efficient Fan Control	Home						0.0%	Each						0.0%
New - Prescriptive Duct Sealing	Home						0.0%							0.0%
New - High Efficiency Forced Air Unit (HE FAU)	Home						0.0%	Each						0.0%
New - A/C Time Delay	Home						0.0%	Each						0.0%
New - Smart Thermostat	Home						0.0%	Each						0.0%
Maintenance														
Furnace Clean and Tune	Home						0.0%	Each						0.0%
Central A/C Tune up	Home						0.0%	Each						0.0%
Lighting														
Interior Hard wired LED fixtures	Each						0.0%	Each						0.0%
Exterior Hard wired LED fixtures	Each						0.0%	Each						0.0%
LED Torchiere	Each						0.0%	Each						0.0%
Occupancy Sensor	Each						0.0%							0.0%
LED Night Light	Each						0.0%							0.0%
New - LED R/BR Lamps	Each						0.0%							0.0%
New - LED A-Lamps	Each						0.0%							0.0%
Miscellaneous														
Pool Pumps	Each						0.0%							0.0%
Smart Strip	Each						0.0%							0.0%
Smart Strip Tier II	Each						0.0%							0.0%
Pilots														
Customer Enrollment														
ESA Outreach & Assessment	Home						0.0%	Home	-	-	-	-	$ -	0.0%
ESA In-Home Energy Education	Home						0.0%	Home	-	-	-	-	$ -	0.0%
Total Savings/Expenditures							0.0%			-	-	-	$ -	0.0%
Total Households Weatherized [2]		-							-					
Households Treated	Total							Total						
- Single Family Households Treated	Home							Home						
- Multi-family Households Treated	Home							Home						
- Mobile Homes Treated	Home							Home						
Total Number of Households Treated	Home							Home						
# Eligible Households to be Treated for PY [3]	Home							Home						
% of Households Treated	%							%						
- Master-Meter Households Treated	Home							Home						

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

<<Includes measures costs

Note: Program launched in 2023

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 2D
ESAP Expenses and Energy Savings by Measures Installed - Building Electrification (SCE only)

Measures	Units	ESA Program - Building Electrification Retrofit Pilot [1] 2022 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 SavingsTreated [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.

Note: Program launched in 2023

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 2E
ESAP Expenses and Energy Savings by Measures Installed - Clean Energy Homes (SCE only)

Measures	Units	ESA Program - Clean Energy Homes Pilot [1] 2022 Completed & Expensed Installation			
		Quantity	Avoided (CO2e) 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			$ -	*<<Includes measures costs*
TOTAL Clean Energy Homes COSTS	$ -	$ -	$ -	

Note: Program launching in 2023

Southern California Edison
2022 Energy Savings Assistance Program Annual Report
ESAP Table 2F
ESAP Expenses and Energy Savings by Measures Installed - CSD Leveraging

		ESA Program - CSD Leveraging					
		Year-To-Date Completed & Expensed Installation					
Measures	Units	Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses ($)	% of Expenditure
Appliances							
High Efficiency Clothes Washer	Each	-	-	-	-	$ -	0.0%
Refrigerators	Each	-	-	-	-	$ -	0.0%
Microwaves	Each	-	-	-	-	$ -	0.0%
New - Freezer	Each						
Domestic Hot Water							
Water Heater Blanket	Home	-	-	-	-	$ -	0.0%
Low Flow Shower Head	Home	-	-	-	-	$ -	0.0%
Water Heater Pipe Insulation	Home	-	-	-	-	$ -	0.0%
Faucet Aerator	Home	-	-	-	-	$ -	0.0%
Water Heater Repair/Replacement	Each	-	-	-	-	$ -	0.0%
Thermostatic Shower Valve	Each	-	-	-	-	$ -	0.0%
New - Combined Showerhead/TSV	Each	-	-	-	-	$ -	0.0%
New - Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%
New - Tub Diverter/ Tub Spout	Each	-	-	-	-	$ -	0.0%
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	0.0%
Enclosure							
Air Sealing / Envelope	Home	-	-	-	-	$ -	0.0%
Caulking	Home	-	-	-	-	$ -	0.0%
Attic Insulation	Home	-	-	-	-	$ -	0.0%
HVAC							
FAU Standing Pilot Conversion	Each	-	-	-	-	$ -	0.0%
Furnace Repair/Replacement	Each	-	-	-	-	$ -	0.0%
Room A/C Replacement	Each	-	-	-	-	$ -	0.0%
Central A/C replacement	Each	-	-	-	-	$ -	0.0%
Heat Pump Replacement	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	$ -	0.0%
Duct Testing and Sealing	Home	-	-	-	-	$ -	0.0%
New - Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%
New - Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -	0.0%
New - A/C Time Delay	Home	-	-	-	-	$ -	0.0%
Maintenance							
Furnace Clean and Tune	Home	-	-	-	-	$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	$ -	0.0%
Lighting							
Compact Fluorescent Lights (CFL)	Each	-	-	-	-	$ -	0.0%
Interior Hard wired CFL fixtures	Each	-	-	-	-	$ -	0.0%
Exterior Hard wired CFL fixtures	Each	-	-	-	-	$ -	0.0%
Torchiere	Each	-	-	-	-	$ -	0.0%
Occupancy Sensor	Each	-	-	-	-	$ -	0.0%
LED Night Lights	Each	-	-	-	-	$ -	0.0%
New - LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	$ -	0.0%
New - LED Reflector Bulb	Each	-	-	-	-	$ -	0.0%
New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	$ -	0.0%
New - LED A-Lamps	Each	-	-	-	-	$ -	0.0%
Miscellaneous							
Pool Pumps	Each	-	-	-	-	$ -	0.0%
Smart Power Strips - Tier 1	Each	-	-	-	-	$ -	0.0%
New - Smart Power Strips - Tier 2	Each	-	-	-	-	$ -	0.0%
Pilots							

Customer Enrollment							
Outreach & Assessment	Home					$ -	0.0%
In-Home Education	Home					$ -	0.0%
Total Savings/Expenditures			-	-	-	$ -	0.0%
Total Households Weatherized							

CSD MF Buildings Treated			**Total**
- Multifamily			0

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

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 3
Program Cost Effectiveness [1]

Program [4]	Ratio of Benefits Over Costs					Net Benefits $		
	ESACET [2]	Resource Test [3]	TRC	PAC	RIM	ESACET	Resource Test	TRC
ESA In-Unit (SF, MH, MF-In-Unit)	0.56	0.39	0.31	0.31	0.20	$ (23,809,914)	$ (26,104,059)	$ (37,169,256)
ESA MF CAM	NA	NA	0.28	0.28	0.18	NA	NA	$ (2,385,297)
ESA MFWB [5] (MF In-Unit, MF CAM, MFWB)								
ESA Pilot Plus and Pilot Deep [5]								
Building Electrification [5]								
Clean Energy Homes [5]								

Notes:

[1] All program measures, including resource and non-resource measures, are represented in the ESACET. Only measures considered resource measures are represented in the Resource Test. Resource measures, as defined by the ESA Cost Effectiveness Working Group, include any measure with a unit savings of less than one kWh or one therm.

[2] The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs.

[3] The Resource Test includes energy benefits and program measure and installation costs.

[4] Energy Division instructed the IOUs to use the results of the PY2015 to 2017 ESA Impact Evaluation for their 2019 and 2020 savings estimates. This does not apply to ESA CAM. ESA CAM savings estimates are based on approved workpapers.

[5] Program launching in 2023.

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 4
Detail by Housing Type and Source[1]

		2022 Energy Savings				
Customer	Housing Type	# Homes /Properties Treated	(mWh)	MW	(mTherm)	2022 Expenses
Gas and Electric Customers						
Owners - Total		-	-	-	-	$ -
	Single Family					
	Multi Family					
	Mobile Homes					
Renters - Total		-	-	-	-	$ -
	Single Family					
	Multi Family					
	Mobile Homes					
Electric Customers (only)						
Owners - Total		**18,060**	**10,631**	**1.62**	-	**$ 38,592,613**
	Single Family	15,930	9,457	1.46		$ 34,914,131
	Multi Family	352	217	0.03		$ 667,688
	Mobile Homes	1,778	957	0.13		$ 3,010,794
Renters - Total		**17,592**	**8,837**	**1.10**	-	**$ 18,062,810**
	Single Family	9,257	4,174	0.61		$ 9,671,514
	Multi Family	7,922	4,468	0.47		$ 7,921,023
	Mobile Homes	413	195	0.03		$ 470,273
Gas Customers (only)						
Owners - Total		-	-	-	-	$ -
	Single Family	-	-	-	-	$ -
	Multi Family	-	-	-	-	$ -
	Mobile Homes	-	-	-	-	$ -
Renters - Total		-				
	Single Family	-	-	-	-	$ -
	Multi Family	-	-	-	-	$ -
	Mobile Homes	-	-	-	-	$ -
Gas and Electric Total - ESA MFWB						
Totals:		**35,652**	**19,468**	**2.721**	-	**$ 56,655,423**

[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM, MFWB, Pilot Plus and Pilot Deep, CSD Leveraging, and Building Electrification.

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible Households Treated by Both Utilities in Shared
2022	PG&E	7,459	-
2022	SDG&E	-	-
2022	SoCalGas	1,058,903	18,365

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual
Report [1] ESAP Table 5
ESAP Direct Purchases & Installation Contractors

Contractor	County	Contractor Type				2022 Annual Expenditures
		Private	CBO	WMDVBE	LIHEAP	
Contractor 1	4		x			$ 811,798
Contractor 2	14	x		x		$ 77,111
Contractor 3	4,6,7,8	x		x		$ 995,842
Contractor 4	4,7,8,9,11		x	x		$ 1,397,822
Contractor 5	4,6,7,8,11	x		x		$ 602,319
Contractor 6	4,7,8,9,11		x	x		$ 334,627
Contractor 7	4,6	x				$ 91,004
Contractor 8	1,2,3,4,5,8,9,10,11		x			$ 5,705,826
Contractor 9	14	x		x		$ 615,304
Contractor 10	7,8	x		x		$ 605,875
Contractor 11	2,4,8,9,10		x	x	x	$ 12,460,356
Contractor 12	4		x	x	x	$ 83,853
Contractor 13	4,9,11		x	x	x	$ 6,433,073
Contractor 14	6		x	x	x	$ 37,418
Contractor 15	6,7,8	x		x		$ 13,056
Contractor 16	2,3,10	x				$ 7,144,763
Contractor 17	4,8	x		x		$ 1,021,656
Contractor 18	All	x		x		$ 2,426,477
Contractor 19	6,7	x		x		$ 315
Contractor 20	14	x		x		$ 113,711
Contractor 21	4,7,8,12	x		x		$ 792,859
Contractor 22	14	x				$ 237,328
Contractor 23	10,14		x	x		$ 9,570,883
Contractor 24	All	x		x		$ 17,039
Contractor 25	4,6		x			$ 25,183
Contractor 26	4,6	x				$ 449,381
Total Contractor Expenditures						**$ 52,064,880**

[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM, MFWB, Pilot Plus and Pilot Deep, CSD Leveraging,

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

Southern California Edison PY 2022 Energy Savings Assistance Program
Annual Report ESAP Table 6
ESAP Installation Cost of Program Installation Contractors [1]

	Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2022 Program Total				
		Installations		Dwellings		Costs		Installations		Dwellings		Costs						Cost/
		Units	%	Units	%	$	%	Units	%	Units	%	$	%	Units Installed	Installations	Costs	Cost/ Unit	Household
Dwellings	Each	266,113	83%	191,370	83%	$ 50,221,298	96%	53,538	17%	40,033	17%	1,839,697	4%	319,651	231,403	$ 52,060,995	$ 162.87	$ 224.98
Appliances																		
High Efficiency Clothes Washer	Home	25	100%	25	100%	$ 25,642	100%		0%		0%		0%	25	25	$ 25,642	$ 1,026	$ 1,026
Refrigerators	Home	10,405	100%	10,204	100%	$ 14,167,556	100%	19	0%	19	0%	$ 23,779	0%	10,424	10,223	$ 14,191,335	$ 1,361	$ 1,388
Microwave	Each		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
New - Freezer	Each	199	100%	199	100%	$ 173,808	100%		0%		0%		0%	199	199	$ 173,808	$ 873	$ 873
MF Refrigerators	Each	2	100%	2	100%	$ 2,752	100%		0%		0%		0%	2	2	$ 2,752	$ 1,376	$ 1,376
Domestic Hot Water																		
Other Domestic Hot Water [5]	Home	198	100%	95	100%	$ 3,895	100%		0%		0%		0%	198	95	$ 3,895	$ 20	$ 41
Water Heater Tank and Pipe Insulation	Home	1	100%	1	100%	$ 34	100%		0%		0%		0%	1	1	$ 34	$ 34	$ 34
Water Heater Repair/Replacement	Each		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
Combined Showerhead/TSV	Each		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
New - Heat Pump Water Heater	Each		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
New - Tub Diverter/ Tub Spout	Each		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
New - Thermostat-controlled Shower Valve	Each	22	100%	22	100%	$ 1,892	100%		0%		0%		0%	22	22	$ 1,892	$ 86	$ 86
Enclosure																		
Air Sealing [1]	Home	862	100%	94	99%	$ 14,047	99%	2	0%	1	1%	$ 113	1%	864	95	$ 14,160	$ 16	$ 149
Caulking	Home		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
Attic Insulation	Home	1,645	100%	2	100%	$ 2,468	100%		0%		0%		0%	1,645	2	$ 2,468	$ 2	$ 1,234
HVAC																		
FAU Standing Pilot Conversion	Home		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
Furnace Repair/Replacement	Home		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
Room A/C Replacement	Home	202	90%	170	89%	$ 185,053	89%	22	10%	22	11%	$ 22,588	11%	224	192	$ 207,641	$ 927	$ 1,081
Central A/C replacement	Home	3,765	98%	3,555	98%	$ 21,661,584	99%	60	2%	60	2%	$ 244,171	1%	3,825	3,615	$ 21,905,755	$ 5,727	$ 6,060
Heat Pump Replacement	Home	74	100%	73	100%	$ 438,524	100%		0%		0%		0%	74	73	$ 438,524	$ 5,926	$ 6,007
Evaporative Cooler (Replacement)	Home		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
Evaporative Cooler (Installation)	Home	2,812	100%	2,812	100%	$ 3,652,282	100%		0%		0%		0%	2,812	2,812	$ 3,652,282	$ 1,299	$ 1,299
Duct Testing and Sealing	Home	6,218	98%	3,361	98%	$ 701,240	98%	120	2%	60	2%	$ 13,800	2%	6,338	3,421	$ 715,040	$ 113	$ 209
New - Energy Efficient Fan Control	Home	48	100%	47	100%	$ 14,805	100%		0%		0%		0%	48	47	$ 14,805	$ 308	$ 315
New - Prescriptive Duct Sealing	Home		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
New - High Efficiency Forced Air Unit (HE FAU)	Home		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
New - A/C Time Delay	Home		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
Smart Thermostat	Home	3,154	98%	3,154	98%	$ 992,429	98%	61	2%	61	2%	$ 19,520	2%	3,215	3,215	$ 1,011,949	$ 315	$ 315
MF Central A/C Replacement	Home	4	11%	1	17%	$ 1,136	2%	32	89%	5	83%	$ 49,342	98%	36	6	$ 50,478	$ 1,402	$ 8,413
MF Duct Testing and Sealing	Home	3	12%	1	17%	$ 300	11%	22	88%	5	83%	$ 2,530	89%	25	6	$ 2,830	$ 113	$ 472
MF Heat Pump Replacement	Home	6	100%	1	100%	$ 15,818	100%		0%		0%		0%	6	1	$ 15,818	$ 2,636	$ 15,818
MF Smart Thermostat	Each	27	84%	27	84%	$ 6,075	79%	5	16%	5	16%	$ 1,600	21%	32	32	$ 7,675	$ 240	$ 240
Maintenance																		
Furnace Clean and Tune	Home		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
Central A/C Tune up	Home		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
Lighting																		
Compact Fluorescent Lights (CFL)	Each	(4)	100%	(4)	100%	$ (28)	100%		0%		0%		0%	(4)	(4)	$ (28)	$ 7	$ 7
Interior Hard wired LED fixtures	Each		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
Exterior Hard wired LED fixtures	Each	87	100%	87	100%	$ 8,124	100%		0%		0%		0%	87	87	$ 8,124	$ 93	$ 93
LED Torchiere	Each	2,788	97%	2,788	97%	$ 196,659	97%	98	3%	98	3%	$ 6,859	3%	2,886	2,886	$ 203,518	$ 71	$ 71
Occupancy Sensor	Each		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
LED Night Light	Each		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
LED Reflector Lamp	Each	1,044	88%	1,044	88%	$ 8,484	87%	142	12%	142	12%	$ 1,230	13%	1,186	1,186	$ 9,714	$ 8	$ 8
New - LED R/BR Lamps	Each		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
New - LED A-Lamps	Each	68,175	82%	68,175	82%	$ 616,569	83%	15,037	18%	15,037	18%	$ 122,257	17%	83,212	83,212	$ 738,826	$ 9	$ 9
MF Ext Parking Lot	Each	328	25%	328	25%	$ 72,980	42%	1,000	75%	1,000	75%	$ 99,257	58%	1,328	1,328	$ 172,237	$ 130	$ 130
MF LED A-Lamp	Each	737	93%	737	93%	$ 8,064	93%	54	7%	54	7%	$ 619	7%	791	791	$ 8,683	$ 11	$ 11
MF LED Exit Sign	Each	186	100%	186	100%	$ 16,767	100%		0%		0%		0%	186	186	$ 16,767	$ 90	$ 90
MF LED Exterior Fixture	Each	6,068	87%	6,068	87%	$ 793,140	92%	888	13%	888	13%	$ 64,512	8%	6,956	6,956	$ 857,652	$ 123	$ 123
MF LED Interior Fixture	Each	5,054	90%	5,054	90%	$ 472,565	91%	544	10%	544	10%	$ 49,245	9%	5,598	5,598	$ 521,810	$ 93	$ 93
MF LED PL-Lamps	Each	937	71%	937	71%	$ 10,990	74%	390	29%	390	29%	$ 3,899	26%	1,327	1,327	$ 14,888	$ 11	$ 11
MF LED Pool and Spa Lighting	Each		0%		0%		0%	3	100%	3	100%	$ 1,449	100%	3	3	$ 1,449	$ 483	$ 483
MF LED Reflector Lamp	Each	279	100%	279	100%	$ 1,824	100%		0%		0%		0%	279	279	$ 1,824	$ 7	$ 7
MF LED T-Lamp	Each	530	23%	530	23%	$ 6,167	27%	1,802	77%	1,802	77%	$ 16,761	73%	2,332	2,332	$ 22,928	$ 10	$ 10
Miscellaneous																		
Pool Pumps	Home	984	100%	984	100%	$ 1,295,749	100%		0%		0%		0%	984	984	$ 1,295,749	$ 1,317	$ 1,317
Smart Strip	Home	23	82%	18	82%	$ 994	83%	5	18%	4	18%	$ 204	17%	28	22	$ 1,198	$ 43	$ 54
Smart Strip Tier II	Each	20,401	77%	20,401	77%	$ 1,531,826	77%	6,211	23%	6,211	23%	$ 461,786	23%	26,612	26,612	$ 1,993,612	$ 75	$ 75
MF Pool Pumps	Each		0%		0%		0%	5	100%	3	100%	$ 7,310	100%	5	3	$ 7,310	$ 1,462	$ 2,437
Ancillary Services																		
Commissioning	Home		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
CAM - Audit	Home		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
Customer Enrollment																		
ESA In-Home Energy Education	Home	27,383	81%	27,382	81%	$ 684,575	81%	6,495	19%	6,495	19%	$ 162,375	19%	33,878	33,877	$ 846,950	$ 25	$ 25
ESA Outreach & Assessment	Home	101,321	83%	32,506	82%	$ 2,423,447	84%	20,468	17%	7,111	18%	$ 460,170	16%	121,789	39,617	$ 2,883,617	$ 24	$ 73
MF CAM Enrollment Fees	Home	120	69%	24	65%	$ 11,061	72%	53	31%	13	35%	$ 4,325	28%	173	37	$ 15,386	$ 89	$ 416

[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM, MFWB, Pilot Plus and Pilot Deep, CSD Leveraging, and Building Electrification.

Southern California Edison PY 2022 Energy Savings Assistance Program
Annual Report ESAP Table 7
Expenditures Recorded by Cost Element [1]

ESA Program:	Labor	Non-Labor	Contractor	Total
Energy Efficiency				
ESA Main Program (SF, MH, MF In-Unit)				
Appliances			$ 11,940,332	$ 11,940,332
Domestic Hot Water			$ 6,058	$ 6,058
Enclosure			$ 732,350	$ 732,350
HVAC			$ 27,945,996	$ 27,945,996
Maintenance			$ -	$ -
Lighting			$ 960,154	$ 960,154
Miscellaneous			$ 3,293,268	$ 3,293,268
Customer Enrollment			$ 2,889,409	$ 2,889,409
In Home Education			$ 847,028	$ 847,028
Multi-Family Common Area Measures				
Appliances			$ 2,752	$ 2,752
Domestic Hot Water				$ -
Enclosure				$ -
HVAC			$ 80,686	$ 80,686
Maintenance				$ -
Lighting			$ 1,618,237	$ 1,618,237
Miscellaneous			$ 7,310	$ 7,310
Customer Enrollment			$ 15,386	$ 15,386
In Home Education				
Multi-Family Whole Building [2]	$ -	$ -	$ -	$ -
Pilot Plus and Pilot Deep [3]	$ 14,062	$ 2,186	$ 278,162	$ 294,411
Building Electrification (SCE Only) [3]	$ 75,294	$ 24,380	$ 23,729	$ 123,402
Clean Energy Homes (SCE Only) [3]	$ 21,911	$ 15,386	$ -	$ 37,298
CSD Leveraging	$ -	$ -	$ -	$ -
Energy Efficiency TOTAL	**$ 111,267**	**$ 41,952**	**$ 50,640,857**	**$ 50,794,077**
Training Center	$ (0)	$ 34,473	$ 23,203	$ 57,676
Inspections	$ (0)	$ -	$ 1,053,187	$ 1,053,187
Marketing and Outreach	$ -	$ 94,391	$ 258,525	$ 352,916
Statewide Marketing Education and Outreach				$ -
Measurement and Evaluation Studies	$ -	$ 374	$ 74,486	$ 74,861
Regulatory Compliance	$ 402,317	$ 837	$ 135,854	$ 539,008
General Administration	$ 1,994,782	$ 163,096	$ 1,574,901	$ 3,732,778
CPUC Energy Division	$ -	$ 50,921	$ -	$ 50,921
SPOC	$ (816)	$ 339	$ 9	$ (469)
TOTAL PROGRAM COSTS	**$ 2,508,366**	**$ 386,045**	**$ 53,761,012**	**$ 56,655,423**

[1] Note that "below the line" summary costs if applicable includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM, MFWB, Pilot Plus and Pilot Deep, CSD Leveraging, Clean Energy Homes, and Building Electrification.

[2] MFWB implementation to occur no earlier than July 2023.

[3] Pilots launching in 2023. No installations in 2022.

Southern California Edison PY 2022 Energy Savings Assistance Program Annual Report ESAP Table 8

ESAP Homes Unwilling / Unable to Participate [1]

	Reason Provided						
County	**Customer Unwilling/Declined Program Measures**	**Customer Unavailable - Scheduling Conflicts**	**Hazardous Environment (unsafe/unclean)**	**Landlord Refused to Authorize Participation**	**Household Income Exceeds Allowable Limits**	**Unable to Provide Required Documentation**	**Other Infeasible/ Ineligible**
Fresno	-	-	-	-	-	-	1
Imperial	-	-	-	-	-	1	2
Inyo	-	-	-	-	1	-	7
Kern	10	14	-	9	21	141	1,157
Kings	13	19	-	6	8	22	541
Los Angeles	67	138	-	115	284	640	22,419
Madera	-	-	-	-	-	-	-
Mono	-	-	-	-	2	-	-
Orange	9	18	-	22	106	144	4,360
Riverside	114	191	-	160	172	825	8,384
San Bernardino	127	200	-	195	179	846	12,314
San Diego	-	-	-	-	-	-	-
Santa Barbara	-	1	-	-	4	2	24
Tulare	95	91	-	22	33	54	3,147
Tuolumne	-	-	-	-	-	-	-
Ventura	8	14	-	2	23	76	1,218
Total	**443**	**686**	**-**	**531**	**833**	**2,751**	**53,574**

[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM, MFWB, Pilot Plus and Pilot Deep, CSD Leveraging, and Building Electrification. MFWB implementation to occur no earlier than July 2023.

ESAP Coordinated Treatment (SCE and SCG only)

	Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency [1]				
# of Households Received Measures from one Utility, but not other Utility or Partnering Agency	**# of Customer Unwilling/Declined Program Measures**	**# of Customer Unavailable - Scheduling Conflicts**	**# of Hazardous Environment (unsafe/unclean)**	**# of Landlord Refused to Authorize Participation**	**# of Other Infeasible/ Ineligible**
25,565	3,275	2,521	-	175	19,594
Total	**3,275**	**2,521**	**-**	**175**	**19,594**

[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), MF CAM, MFWB, Pilot Plus and Pilot Deep, CSD Leveraging, and Building Electrification.

Southern California Edison PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 9
Life Cycle Bill Savings by Measure - ESA Main Program (SF, MH, MF In-Unit)

Measure Name	Unit	2022 Number Installed	Per Measure Electric Impact (kWh) [1]	Per Measure Gas Impact (Therms)	Effective Useful Life (years)	2022 Total Measure Life Cycle Bill Savings [4]
Appliances						
High Efficiency Clothes Washer	Home	25	97.64		11	$ 5,862
Refrigerator	Home	10,223	584.08		14	$ 18,251,412
Microwave	Each	-				
New - Freezer	Each	199	848.00		11	$ 405,283
Domestic Hot Water						
Other Domestic Hot Water [2]	Home	95	56.91		10	$ 11,803
Water Heater Tank and Pipe Insulation	Home	1	47.00		7	$ 72
Water Heater Repair/Replacement	Each	-				
Combined Showerhead/TSV	Each	-				
New - Heat Pump Water Heater	Each	-				
New - Tub Diverter/ Tub Spout	Each	-				
New - Thermostat-controlled Shower Valve	Each	22	45.58		10	$ 2,189
Enclosure						
Air Sealing [3]	Home	95	69.12		11	$ 15,769
Caulking	Home	-				
Attic Insulation	Home	2	215.00		18	$ 1,690
HVAC						
FAU Standing Pilot Conversion	Home	-				
Furnace Repair/Replacement	Home	-				
Room A/C Replacement	Home	192	(154.36)		9	$ (58,236)
Central A/C replacement	Home	3,615	341.49		15	$ 4,042,909
Heat Pump Replacement	Home	73	1,266.55		15	$ 302,798
Evaporative Cooler (Replacement)	Home	-				
Evaporative Cooler (Installation)	Home	2,812	560.80		15	$ 5,164,539
Duct Test and Seal	Home	3,421	-		18	$ -
New - Energy Efficient Fan Control	Home	47	68.21		5	$ 3,500
New - Prescriptive Duct Sealing	Home	-				
New - High Efficiency Forced Air Unit (HE FAU)	Home	-				
New - A/C Time Delay	Home	-				
New - Smart Thermostat	Home	3,215	276.69		9	$ 1,767,372
Maintenance						
Furnace Clean and Tune	Home	-				
Central A/C Tune up	Home	-				
Lighting						
Compact Fluorescent Lights (CFL)	Each	(4)	17.37		9	$ (143)
Interior Hard wired LED fixtures	Each	-				
Exterior Hard wired LED fixtures	Each	87	14.60		16	$ 4,439
LED Torchiere	Each	2,886	71.50		16	$ 720,878
Occupancy Sensor	Each	-				
LED Night Light	Each	-				
LED Reflector Lamp	Each	1,186	21.30		16	$ 88,251
New - LED R/BR Lamps	Each	-				
New - LED A-Lamps	Each	83,212	38.70		16	$ 11,248,710
Miscellaneous						
Pool Pumps	Home	984	999.98		10	$ 2,148,346
Smart Strip	Home	22	(1.10)		5	$ (27)
Smart Strip Tier II	Each	26,612	139.89		5	$ 4,064,062
Pilots						
Total						$ 48,191,478
Total Homes Served By the Program	35,652					
Life Cycle Bill Savings Per Home	$1,352					

[1] Savings estimates are sourced from SCE's ex ante analysis of the 2015-2017 ESA Impact Evaluation results, or SCE/SW Workpapers.
[2] Other Domestic Hot Water includes the following parts: Faucet Aerator and Low Flow Showerhead.
[3] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping , caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.
[4] Energy rate used in Table 10 was used to calculate Measure Life Cycle Bill Savings.

Southern California Edison PY 2022 Energy Savings Assistance Program
Annual Report ESAP Table 9 A
Life Cycle Bill Savings by Measure - ESA MF CAM

Measure Name	Unit	2022 Number Installed	Per Measure Electric Impact (kWh) [1]	Per Measure Gas Impact (Therms)	Effective Useful Life (years)	2022 Total Measure Life Cycle Bill Savings [2]
Appliances						
MF Refrigerators	Each	2	606.00		14	$ 4,179
Domestic Hot Water						
Central Boiler	Cap-					
Faucet Aerator	Each					
Pipe Insulation	Home					
Enclosure						
Air Sealing / Envelope	Home					
Caulking	Home					
Attic Insulation	Home					
HVAC						
MF Central A/C Replacement	Home	6	284.00		15	$ 6,296
MF Duct Test Inspection	Each	3				
MF Duct Testing and Sealing	Home	6				
MF Heat Pump Replacement	Home	1	1,636.00		15	$ 6,044
MF Inspection	Each	17				
MF Smart Thermostat	Each	32	259.56		9	$ 18,617
Lighting						
MF Ext Parking Lot	Each	1,328	289.29		4	$ 378,509
MF LED A-Lamp	Each	791	228.58		3	$ 146,966
MF LED Exit Sign	Each	186	360.34		16	$ 264,138
MF LED Exterior Fixture	Each	6,956	52.95		12	$ 1,088,691
MF LED Interior Fixture	Each	5,598	22.01		3	$ 98,941
MF LED PL-Lamps	Each	1,327	76.46		3	$ 82,471
MF LED Pool and Spa Lighting	Each	3	876.00		5	$ 3,159
MF LED Reflector Lamp	Each	279	9.76		3	$ 2,214
MF LED T-Lamp	Each	2,332	49.17		5	$ 141,205
Miscellaneous						
Tier-2 Smart Power Strip	Each	-				
MF Pool Pumps	Each	3	9,238.85		10	$ 68,269
Enrollment Fees						
Enrollment Fees	Each	37				
Ancillary Services						
Audit						
Total						$ 2,309,699
Total Properties Served By the Program	44					
Life Cycle Bill Savings Per Property	$ 52,493					

[1] Savings estimates are sourced from SCE's ex ante analysis of the 2015-2017 ESA Impact Evaluation results, or SCE/SW Workpapers.
[2] Energy rate used in Table 10 was used to calculate Measure Life Cycle Bill Savings.

Southern California Edison PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 9 B
Life Cycle Bill Savings by Measure - ESA Pilot Plus and Pilot Deep

Measure Name	Unit	2022 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (years)	2022 Total Measure Life Cycle Bill Savings
Appliances						
High Efficiency Clothes Washer	Each					
Refrigerator	Each					
Microwave	Each					
New - Freezer	Each					
Domestic Hot Water						
Other Domestic Hot Water	Home					
Water Heater Tank and Pipe Insulation	Home					
Water Heater Repair/Replacement	Each					
Combined Showerhead/TSV	Each					
New - Heat Pump Water Heater	Each					
New - Tub Diverter/ Tub Spout	Each					
New - Thermostat-controlled Shower Valve	Each					
Enclosure						
Air Sealing / Envelope	Home					
Caulking	Home					
Attic Insulation	Home					
HVAC						
FAU Standing Pilot Conversion	Each					
Furnace Repair/Replacement	Each					
Room A/C Replacement	Each					
Central A/C replacement	Each					
Heat Pump Replacement	Each					
Evaporative Cooler (Replacement)	Each					
Evaporative Cooler (Installation)	Each					
Duct Test and Seal	Home					
New - Energy Efficient Fan Control	Home					
New - Prescriptive Duct Sealing	Home					
New - High Efficiency Forced Air Unit (HE FAU)	Home					
New - A/C Time Delay	Home					
New - Smart Thermostat	Home					
Maintenance						
Furnace Clean and Tune	Home					
Central A/C Tune-up	Home					
Lighting						
Interior Hard wired LED fixtures	Each					
Exterior Hard wired LED fixtures	Each					
LED Torchiere	Each					
Occupancy Sensor	Each					
LED Night Light	Each					
New - LED R/BR Lamps	Each					
New - LED A-Lamps	Each					
Miscellaneous						
Pool Pumps	Each					
Smart Strip	Each					
Smart Strip Tier II	Each					
Pilots						
Total						$ -
Total Homes Served By the Program						
Life Cycle Bill Savings Per Home						

Note: Program launched in 2023

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 9 C
Life Cycle Bill Savings by Measure - Building Electrification (SCE Only)

Measure Name	Unit	2022 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (years)	2022 Total Measure Life Cycle Bill Savings
Appliances						
High Efficiency Clothes Washer	Each					
Refrigerator	Each					
Microwave	Each					
New - Freezer	Each					
Domestic Hot Water						
Other Domestic Hot Water	Home					
Water Heater Tank and Pipe Insulation	Home					
Water Heater Repair/Replacement	Each					
Combined Showerhead/TSV	Each					
New - Heat Pump Water Heater	Each					
New - Tub Diverter/ Tub Spout	Each					
New - Thermostat-controlled Shower Valve	Each					
Enclosure						
Air Sealing / Envelope	Home					
Caulking	Home					
Attic Insulation	Home					
HVAC						
FAU Standing Pilot Conversion	Each					
Furnace Repair/Replacement	Each					
Room A/C Replacement	Each					
Central A/C replacement	Each					
Heat Pump Replacement	Each					
Evaporative Cooler (Replacement)	Each					
Evaporative Cooler (Installation)	Each					
Duct Test and Seal	Home					
New - Energy Efficient Fan Control	Home					
New - Prescriptive Duct Sealing	Home					
New - High Efficiency Forced Air Unit (HE FAU)	Home					
New - A/C Time Delay	Home					
New - Smart Thermostat	Home					
Maintenance						
Furnace Clean and Tune	Home					
Central A/C Tune-up	Home					
Lighting						
Interior Hard wired LED fixtures	Each					
Exterior Hard wired LED fixtures	Each					
LED Torchiere	Each					
Occupancy Sensor	Each					
LED Night Light	Each					
New - LED R/BR Lamps	Each					
New - LED A-Lamps	Each					
Miscellaneous						
Pool Pumps	Each					
Smart Strip	Each					
Smart Strip Tier II	Each					

Pilots						
Total						$ -
Total Homes Served By the Program						
Life Cycle Bill Savings Per Home						

Note: Program launched in 2023

Southern California Edison
PY 2022 Energy Savings Assistance Program
Annual Report ESAP Table 10 [1]

Residential Energy Rate Used for Bill Savings Calculations [2]		
Year	$/kWh	$/Therm
2022	0.22	
2023	0.22	
2024	0.23	
2025	0.24	
2026	0.25	
2027	0.25	
2028	0.26	
2029	0.27	
2030	0.28	
2031	0.28	
2032	0.29	
2033	0.30	
2034	0.31	
2035	0.32	
2036	0.33	
2037	0.34	
2038	0.35	
2039	0.36	
2040	0.37	
2041	0.38	
2042	0.39	
2043	0.41	
2044	0.42	
2045	0.43	
2046	0.44	
2047	0.46	

Non-Residential Energy Rate Used for Bill Savings Calculations (MF In-Unit, MF CAM, MFWB) [3]		
Year	$/kWh	$/Therm
2022	0.25	
2023	0.25	
2024	0.26	
2025	0.27	
2026	0.28	
2027	0.29	
2028	0.29	
2029	0.30	
2030	0.31	
2031	0.32	
2032	0.33	
2033	0.34	
2034	0.35	
2035	0.36	
2036	0.37	
2037	0.38	
2038	0.40	
2039	0.41	
2040	0.42	
2041	0.43	
2042	0.44	
2043	0.46	
2044	0.47	
2045	0.49	
2046	0.50	
2047	0.52	

[1] For 2022, the average cost per kWh paid by ESA participants is shown. Cost is escalated 3% annually for remaining years.

[2] Summary includes ESA Main Program (SF, MH, MF-In-Unit) Pilot Plus and Pilot Deep, CSD Leveraging, and Building Electrification. Clean Energy Homes is not applicable.

[3] Summary data includes ESA MF CAM and MFWB. MF In-Unit is shown in residential rates.

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual Report
Bill Savings Calculations

ESAP Table 11
Bill Savings Calculations by Program Year (ESA Main - SF, MH, MF-In-Unit)

Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2011				
2012				
2013				
2014	$ 55,886,233	$ 39,869,484	0.71	$ 518
2015	$ 51,068,549	$ 36,544,121	0.72	$ 675
2016	$ 56,095,969	$ 33,470,336	0.60	$ 815
2017	$ 61,120,956	$ 41,459,029	0.68	$ 516
2018	$ 67,817,718	$ 63,225,275	0.93	$ 733
2019	$ 90,358,914	$ 75,721,253	0.84	$ 794
2020	$ 54,903,984	$ 39,800,161	0.72	$ 653
2021	$ 81,224,622	$ 77,516,128	0.95	$ 853
2022	$ 54,475,942	$ 48,191,478	0.88	$ 1,352

ESAP Table 11 A
Bill Savings Calculations by Program Year (Pilot Plus and Pilot Deep)

Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022				

Note: Data for program years prior to 2022 is not applicable as program not authorized until D.21-06-015.

ESAP Table 11 B
Bill Savings Calculations by Program Year - MF CAM and MFWB

Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022	$ 1,724,371	$ 2,309,699	1.339	$ 52,493

Note: Summary data includes ESA MF CAM and MFWB. MF In-Unit is shown in ESA Main.
MFWB implementation to occur no earlier than July 2023.

ESAP Table 11 C
Bill Savings Calculations by Program Year - Building Electrification

Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
2021				
2022				

Note: Data for program years prior to 2022 is not applicable as program not authorized until D.21-06-015.
Note: Clean Energy Homes is not applicable.

Southern California Edison PY 2022 Energy Savings Assistance Program Annual Report ESAP Table 12 Fund Shifting

			Budget			Expenditures			(Shift) or Carried Forward (Budget - Expenditures = Variance)			FUND SHIFT AMOUNT													
												Among Categories within Program			Carry Forward from 2021			Carry Back from 2023							
Date	Program Year 2022	Electric	Gas	Total Authorized	Electric	Gas	Total Expenditures	Electric	Gas	Total	(1) Shift of Current Year Authorized			(2) Shift of Carry Forward			(3) Shift of Carry Back			Total Shifted Gas/ Electric	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization
								Variance			Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total					
	ESA Program:	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	($x,xxx)	x%				G-xxxx, D.xx- xx-xxx
	Energy Efficiency	$ 52,879,012		$ 52,879,012			$ -	$ 52,879,012	$ -	$ 52,879,012	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.			
	Appliance			$ -	$ 11,940,332		$ 11,940,332	$ (11,940,332)	$ -	$ (11,940,332)	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Domestic Hot Water			$ -	$ 6,058		$ 6,058	$ (6,058)	$ -	$ (6,058)	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Enclosure			$ -	$ 732,350		$ 732,350	$ (732,350)	$ -	$ (732,350)	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	HVAC			$ -	$ 27,945,996		$ 27,945,996	$ (27,945,996)	$ -	$ (27,945,996)	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Maintenance			$ -	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Lighting			$ -	$ 960,154		$ 960,154	$ (960,154)	$ -	$ (960,154)	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Miscellaneous			$ -	$ 3,293,268		$ 3,293,268	$ (3,293,268)	$ -	$ (3,293,268)	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Customer Enrollment			$ -	$ 2,889,409		$ 2,889,409	$ (2,889,409)	$ -	$ (2,889,409)	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	In Home Education			$ -	$ 847,928		$ 847,928	$ (847,928)	$ -	$ (847,928)	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Pilot			$ -	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Multi-Family Common Area Measures	$ 1,800,000		$ 1,800,000	$ 1,724,371		$ 1,724,371	$ 75,629	$ -	$ 75,629	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Multi-Family Whole Building	$ -		$ -	$ -		$ -	$ -	$ -	$ -			$ -			$ -					0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Pilot Plus and Pilot Deep	$ 3,884,864		$ 3,884,864	$ 294,411		$ 294,411	$ 3,590,453	$ -	$ 3,590,453	$ 3,579,322		$ 3,579,322			$ -				$ 3,579,322	4.8%	1. 2.Carried forward 3.	1. 2. 2022 to 2023 3.	1. 2. shift from 2022 to 2023	1. 2. D.21-06-015 3.
	Building Electrification	$ 4,087,060		$ 4,087,060	$ 123,402		$ 123,402	$ 3,963,658	$ -	$ 3,963,658	$ 3,963,658		$ 3,963,658			$ -				$ 3,963,658	5.3%	1. 2.Carried forward 3.	1. 2. 2022 to 2023 3.	1. 2. shift from 2022 to 2023	1. 2. D.21-06-015 3.
	Clean Energy Homes	$ 1,810,000		$ 1,810,000	$ 37,298		$ 37,298	$ 1,772,702	$ -	$ 1,772,702	$ 1,734,150		$ 1,734,150			$ -				$ 1,734,150	2.3%	1. 2.Carried forward 3.	1. 2. 2022 to 2023 3.	1. 2. shift from 2022 to 2023	1. 2. D.21-06-015 3.
	SASH/MASH			$ -			$ -	$ -	$ -	$ -			$ -			$ -				$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Leveraging			$ -			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Energy Efficiency TOTAL	**$ 64,460,936**	**$ -**	**$ 11,581,924**	**$ 50,794,077**	**$ -**	**$ 50,794,077**	**$ (39,212,152)**	**$ -**	**$ (39,212,152)**	**$ 9,277,130**	**$ -**	**$ 9,277,130**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 9,277,130**	-12.3%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Training Center	$ 600,650		$ 600,650	$ 57,676		$ 57,676	$ 542,974	$ -	$ 542,974	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Inspections	$ 1,677,406		$ 1,677,406	$ 1,053,187		$ 1,053,187	$ 624,219	$ -	$ 624,219	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Marketing and Outreach	$ 1,374,878		$ 1,374,878	$ 352,916		$ 352,916	$ 1,021,962	$ -	$ 1,021,962	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Statewide ME&O	$ -		$ -	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	M&E Studies	$ 225,000		$ 225,000	$ 74,861		$ 74,861	$ 150,139	$ -	$ 150,139	$ 150,139	$ -	$ 150,139	$ 184,318	$ -	$ 184,318	$ -	$ -	$ -	$ 334,457	0.4%	1. 4. Carried Forward 3.	1. 2. 2022 to 2023 3.	1. 2. shift from 2022 to 2023	1. 2. D.21-06-015 3.
	Regulatory Compliance	$ 691,730		$ 691,730	$ 539,008		$ 539,008	$ 152,722	$ -	$ 152,722	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	General Administration	$ 6,218,785		$ 6,218,785	$ 3,732,778		$ 3,732,778	$ 2,486,007	$ -	$ 2,486,007	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	CPUC Energy Division	$ 51,579		$ 51,579	$ 50,921		$ 50,921	$ 658	$ -	$ 658	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	TOTAL PROGRAM COSTS	**$ 75,300,964**	**$ -**	**$ 75,300,964**	**$ 56,655,423**	**$ -**	**$ 56,655,423**	**$ (34,233,471)**	**$ -**	**$ (34,233,471)**	**$ 9,427,270**	**$ -**	**$ 9,427,270**	**$ 184,318**	**$ -**	**$ 184,318**	**$ -**	**$ -**	**$ -**	**$ 9,611,587**	**-12.8%**				
					$ -	$ -	$ -	$ -	$ -	$ -				$ -	$ -	$ -									
	TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	**$ 75,300,964**	**$ -**	**$ 75,300,964**	**$ 56,655,423**	**$ -**	**$ 56,655,423**	**$ 18,645,541**	**$ -**	**$ 18,645,541**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**					

Southern California Edison PY 2022 Energy Savings Assistance Program
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ESAP Table 13
Categorical and Other Enrollment

ESA Main (SF, MH, MF In-Unit) [1]	
Type of Enrollment	**Number of Homes Treated**
Women, Infants, and Children Program (WIC)	1,048
Supplemental Security Income (SSI)	2,758
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	1,487
CalWORKs/Temporary Assistance for Needy Families (TANF)	66
Tribal TANF	-
Medicaid/Medi-Cal for Families	4,576
Healthy Families A&B	-
National School Lunch Program (NSLP) - Free Lunch	759
Low-income Home Energy Assistance Program (LIHEAP)	8
Bureau of Indian Affairs General Assistance	-
Head Start Income Eligible - (Tribal Only)	-
Targeted Self Certification	-
Virtual ESA Self Certification	3,623
Other - Categorical	14,405
Standard Enrollment	6,752
80/20 Multifamily	170
Total	**35,652**

ESA MF CAM	
Type of Enrollment	**Number of Homes Treated**
Women, Infants, and Children Program (WIC)	-
Supplemental Security Income (SSI)	-
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	-
CalWORKs/Temporary Assistance for Needy Families (TANF)	-
Tribal TANF	-
Medicaid/Medi-Cal for Families	-
Healthy Families A&B	-
National School Lunch Program (NSLP) - Free Lunch	-
`	-
Bureau of Indian Affairs General Assistance	-
Head Start Income Eligible - (Tribal Only)	-
Targeted Self Certification	-
Virtual ESA Self Certification	-
Other - Categorical	21
Standard Enrollment	170
80/20 Multifamily	594
Total	**785**

ESA Pilot Plus and Pilot Deep [2]	
Type of Enrollment	**Number of Homes Treated**
Women, Infants, and Children Program (WIC)	
Supplemental Security Income (SSI)	
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	
CalWORKs/Temporary Assistance for Needy Families (TANF)	
Tribal TANF	
Medicaid/Medi-Cal for Families	
Healthy Families A&B	
National School Lunch Program (NSLP) - Free Lunch	
Low-income Home Energy Assistance Program (LIHEAP)	
Bureau of Indian Affairs General Assistance	
Head Start Income Eligible - (Tribal Only)	
Targeted Self Certification	
Virtual ESA Self Certification	
Other - Categorical	
Standard Enrollment	
80/20 Multifamily	
Total	**-**

ESA Building Electrification (SCE Only) [2]	
Type of Enrollment	**Number of Homes Treated**
Women, Infants, and Children Program (WIC)	
Supplemental Security Income (SSI)	
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	
CalWORKs/Temporary Assistance for Needy Families (TANF)	
Tribal TANF	
Medicaid/Medi-Cal for Families	
Healthy Families A&B	
National School Lunch Program (NSLP) - Free Lunch	
Low-income Home Energy Assistance Program (LIHEAP)	
Bureau of Indian Affairs General Assistance	
Head Start Income Eligible - (Tribal Only)	
Targeted Self Certification	
Virtual ESA Self Certification	
Other - Categorical	
Standard Enrollment	
80/20 Multifamily	
Total	**-**

[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit).

[2] No activity due to program launch date of Jan 2023.

Note: Categorical enrollment is not applicable to MFWB or Clean Energy Homes.

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 14
Leveraging & Integration [1]

ESA Main (SF, MH, MF In-Unit) [1]

Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
Grid Alternatives (DAC-SASH and SOMAH program administrator)	G.A. shares with SCE low income leads of SF and MF In-Unit homes on which they intend to install solar panels. SCE ensures those homes have been or will be enrolled in ESA.	Yes	Yes	$50	2,535	N	5		Y	
Other IOU ESA Programs (SCG, PG&E, SWG, Datasharing)	IOUs share lists of homes served in joint territories.	Yes	Yes	$175,580	8,905,291	N	17,558		Y	
Joint Contractor Across Programs	SCE used existing CMHP (Mobile Home program) contractor to jointly complete ESA applications and assessments for Mobile Homes.	Yes	Yes	$3,190	161,795	N	319		N	This combination likely enhanced perceived value of both programs to potential participants when being asked to participate.

Notes:

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

[2] Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU). In 2022 SCE spent approximately $10 ($352,916 / $808,919 / 35,652 HT) per Treated lead through marketing and outreach efforts. a) Grid Alt: 5 homes x $10 per home = $50. b) 17,558 Treated homes

[3] through other IOUs' ESA/low income programs at $10 per saved lead = $175,580. c) 319 Treated Homes by CMHP contractor x $10 per HH M&O = $3,190.

[4] Energy savings/benefits. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households. Average kWh saved per Treated home in PY2022 is 507 kWh as calculated from ESA Table 2 of this report: 18,082,438 kWh / 35,652 treated homes = 507 kWh/home. a) 5 ESA homes treated with Grid Alternatives (DAC-SASH and SOMAH) 5 x 507 kWh/HT = 2,535 kWh. b) 17,558 ESA homes treated via IOU datasharing x 507 kWh/Home = 8,905,291 kWh. c) 319 ESA Homes by CMHP Contractor x 507 kWh/Home = 161,795 kWh. Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

[5] Savings are calculated based on SCE Ex-Ante analysis of DNV-GL ESA Program 2015-2017 Impact Evaluation Final Report, or SCE workpapers.

MF CAM and MFWB

Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
Grid Alternatives (SOMAH program administrator)	G.A. shares with SCE low income leads of MF properties on which they intend to install solar panels. SCE ensures those properties have been or will be enrolled in ESA MF CAM.	Yes	Yes	$20	1,014	N	2		Yes	

Notes:

[2] Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU). In 2022 SCE spent approximately $10 ($352,916 / $808,919 / 35,652 HT) per Treated lead through marketing and outreach efforts. a) SOMAH: 2 homes x $10 per home = $20.

[3] Energy savings/benefits. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households. Average kWh saved per Treated home in PY2022 is 507 kWh as calculated from ESA Table 2 of this report: 18,082,438 kWh / 35,652 treated homes = 507 kWh/home. a) 2 ESA MF properties treated with Grid Alternatives SOMAH 2 x 507 kWh/HT = 1,014 kWh.

[4] Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served. Number of enrollment findings per SOMAH's Annual ESA Referral Data Request Repot.

[5] Savings are calculated based on SCE Ex-Ante analysis of DNV-GL ESA Program 2015-2017 Impact Evaluation Final Report, or SCE workpapers.

ESA Pilot Plus and Pilot Deep

Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain

ESA Building Electrification (SCE Only)

Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain

ESA Clean Energy Homes (SCE Only)

Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain

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

[2] Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).

[3] Annual Energy savings/benefits for measures installation in 2021. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.

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

[5] In footnotes, provide information on methodology used to calculate cost and/or resource savings.

Fields not applicable to specific efforts are marked "N/A".

Southern California Edison
PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 14A
Clean Energy Referral, Leveraging, and Coordination

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

Note to IOUs:
Leveraging activities would include when programs share resources to jointly support program delivery or administration.
While coordination refers more generally to program communication, collaboration, and alignment of activities to support individual program delivery.

[1] Fully Subscribed for 2022. Leads are waitlisted until 2023.
[2] Data begins with 7/31/22 reporting.
[3] Sharing of lead list.

Southern California Edison PY 2022 Energy Savings Assistance Program Annual Report ESAP Table 15
Expenditures for Pilots and Studies

				2022 Expenses			% of Budget Expensed		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots									
Pilot Plus / Pilot Deep	$ 3,884,864		$ 3,884,864	$ 294,411		$294,411	8%	0%	8%
Building Electrification Pilot	$ 4,087,060		$ 4,087,060	$ 123,402		$123,402	3%	0%	3%
Clean Energy Home	$ 1,810,000		$ 1,810,000	$ 37,298		$ 37,298	2%	0%	2%
Total Pilots	**$9,781,924**	**$0**	**$9,781,924**	**$455,110**	**$0**	**$455,110**	**5%**	**0%**	**5%**
Studies [1]									
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study [2]	$ 75,000		$ 75,000	$ 46,699		$ 46,699	62%	0%	62%
Joint IOU - 2025 Low Income Needs Assessment (LINA) Study	$ 75,000		$ 75,000	$ -		$ -	0%	0%	0%
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study	$ 75,000		$ 75,000	$ -		$ -	0%	0%	0%
Joint IOU - Statewide CARE-ESA Categorical Study [3]	$ 22,500		$ 22,500	$ -		$ -	0%	0%	0%
Load Impact Evaluation Study	$ 450,000		$ 450,000	$ -		$ -	0%	0%	0%
Equity Criteria and Non Energy Benefits Evaluation (NEB's)	$ 150,000		$ 150,000	$ -		$ -	0%	0%	0%
Rapid Feedback Research and Analysis [4]	$ 155,000		$ 155,000	$ -		$ -	0%	0%	0%
Joint IOU - Multifamily CAM Process Evaluation [5]	$ 90,000		$ 90,000	$ -		$ -	0%	0%	0%
Joint IOU - Process Evaluation Studies (1-4 Studies)			$ -	$ -		$ -	0%	0%	0%
Process Evaluation Studies (1-4 Studies)	$ 150,000		$ 150,000	$ -		$ -	0%	0%	0%
Discretionary	$ 300,000		$ 300,000	$ -		$ -	0%	0%	0%
Total Studies	**$1,542,500**	**$0**	**$1,542,500**	**$46,699**	**$0**	**$46,699**	**3%**	**0%**	**3%**

[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

[2] 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.

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

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

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

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

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ESAP Table 16
ESAP Tribal Outreach [1]

OUTREACH STATUS	Quantity (Includes CARE, FERA, and ESA)	List of Participating Tribes
Tribes completed ESA Meet & Confer	8	Benton Paiute, Bishop Paiute, Timbisha Shoshone, Chemehuevi, CRIT, Morongo, Soboba, Pechanga
Tribes requested outreach materials or applications	0	
Tribes who have not accepted offer to Meet and Confer	5	Bridgeport Indian colony, Tule River, Stated residents are over income: San Manuel, 29 Palms, Agua Caliente
Non-Federally Recognized Tribes who participated in Meet & Confer	N/A	
Tribes and Housing Authority sites involved in Focused Project/ESA	0	
Partnership offer on Tribal Lands	0	
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	0	
Housing Authority and TANF offices who participated in Meet and Confer	0	

[1] Summary data which includes ESA Main Program (SF, MH, MF-In-Unit), Pilot Plus and Pilot Deep, MF CAM, CSD Leveraging, Building Electrification, and Clean Energy Homes.

Southern California Edison PY 2022 Energy Savings Assistance Program Annual Report
ESAP Table 17
Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions

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

Customer Segments	# of Households Eligible [1]	# of Households Treated [2]	Enrollment Rate = (C/B)	# of Households [3]	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households	Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms)
Demographic													
Housing Type													
SF	1,091,750	25,187	2%	10,342	244%	444.02	625.74	0.07	(2.29)	(2.29)	$ 1,071	0.000004	
MH	118,960	2,191	2%	498	440%	435.25	605.25	0.06	(1.15)	(1.15)	$ 1,008	0.000074	
MF In-Unit	442,786	8,274	2%	3,146	263%	340.82	527.82	0.05	(1.35)	(1.35)	$ 502	0.000018	
Rent vs. Own			0%		0%								
Own	707,343	18,060	2%	7,059	256%	466.12	652.31	0.07	(2.19)	(2.19)	$ 1,252	0.000006	
Rent	949,219	17,592	0%	6,927	254%	371.70	552.33	0.05	(1.80)	(1.80)	$ 609	0.000007	
Previous	-	11,053		710		395.00	576.33	0.06	(1.96)	(1.96)	$ 885	0.000009	
New Participant	27,051	24,599	91%	13,276	185%	430.55	613.97	0.07	(1.99)	(1.99)	$ 957	0.000005	
Seniors	477,067	8,004	2%	2,995	267%	435.50	624.39	0.06	(1.88)	(1.88)	$ 1,070	0.000015	
Veterans [4]	96,723	-	0%	-	0%	-	-	-	-	-	$ -	-	
Hard-to-Reach [5]	1,352,338	31,833	2%	12,169	262%	418.04	595.27	0.06	(1.93)	(1.93)	$ 948	0.000004	
Vulnerable [6]	603,866	30,049	5%	12,030	250%	405.16	588.76	0.06	(1.98)	(1.98)	$ 816	0.000004	
Location													
DAC	577,425	20,868	4%	8,585	243%	389.67	578.56	0.06	(2.02)	(2.02)	$ 732	0.000006	
Rural	254,023	6,212	2%	2,330	267%	527.42	697.42	0.08	(2.60)	(2.60)	$ 1,997	0.000018	
Tribal [4]	8,832	528	6%	201	263%	473.24	201.00	0.07	(2.02)	(2.02)	$ 1,351	0.000223	
PSPS Zone	635,632	440	0%	124	355%	507.02	507.02	0.08	(1.89)	(1.89)	$ 897	0.000257	
Wildfire Zone	281,693	5,470	2%	2,003	273%	481.70	651.70	0.08	(1.99)	(1.99)	$ 976	0.000021	
Climate Zone 06	251,001	2,361	1%	983	240%	343.72	513.72	0.05	(1.44)	(1.44)	$ 534	0.000065	
Climate Zone 08	391,005	9,139	2%	3,819	239%	327.15	518.40	0.05	(1.71)	(1.71)	$ 449	0.000014	
Climate Zone 09	314,012	7,328	2%	2,945	249%	403.74	602.07	0.06	(1.97)	(1.97)	$ 527	0.000016	
Climate Zone 10	353,775	9,685	3%	3,597	269%	446.74	616.74	0.07	(2.15)	(2.15)	$ 701	0.000012	
Climate Zone 13	81,749	2,859	3%	1,158	247%	545.83	715.83	0.08	(3.55)	(3.55)	$ 2,788	0.000039	
Climate Zone 14	170,693	2,519	1%	846	298%	577.31	747.31	0.08	(2.25)	(2.25)	$ 2,688	0.000054	
Climate Zone 15	56,370	986	2%	310	318%	519.58	689.58	0.08	(0.86)	(0.86)	$ 2,067	0.000094	
Climate Zone 16	37,835	775	2%	328	236%	442.91	612.91	0.07	(2.64)	(2.64)	$ 681	0.000138	
CARB Communities [7]	186,716	6,209	3%	2,865	217%	361.23	559.56	0.05	(2.13)	(2.13)	$ 490	0.000019	
Financial													
CARE	1,276,922	20,618	2%	8,007	257%	433.17	609.71	0.06	(1.94)	(1.94)	$ 1,029	0.000004	
FERA	221,674	233	0%	99	235%	422.21	422.21	0.07	(2.04)	(2.04)	$ 857	0.000349	
Disconnected [8]	-	-	0%	-	0%	-	-	-	-	-	$ -	-	
Arrearages	687,677	10,362	2%	4,789	216%	409.40	589.40	0.06	(1.97)	(1.97)	$ 877	0.000011	
High Usage	69,406	1,593	2%	742	215%	474.08	644.08	0.08	(1.95)	(1.95)	$ 1,116	0.000043	
High Energy Burden [9]	523,397	8,943	2%	3,400	263%	506.64	676.64	0.08	(2.05)	(2.05)	$ 1,787	0.000013	
SEVI [10]													
SEVI - Low	246,113	2,551	1%	1,002	255%	456.25	626.25	0.07	(2.09)	(2.09)	$ 963	0.000045	
SEVI - Medium	752,969	14,112	2%	5,418	260%	447.97	617.97	0.07	(2.00)	(2.00)	$ 1,074	0.000008	
SEVI - High	657,481	18,989	3%	7,566	251%	393.46	586.13	0.06	(1.96)	(1.96)	$ 828	0.000006	
Affordability Ratio [11]	104,713	35,620	34%	13,986	255%	419.67	602.50	0.06	(1.98)	(1.98)	$ 935	0.000003	
Health Condition													
Medical Baseline	26,355	991	4%	378	262%	500.02	670.02	0.08	(2.02)	(2.02)	$ 1,388	0.000079	
Respiratory [12]													
Respiratory - Low	435,556	3,881	1%	1,476	263%	420.73	590.73	0.06	(1.67)	(1.67)	$ 850	0.000030	
Respiratory - Mediu	635,992	15,828	2%	6,014	263%	416.58	593.38	0.06	(2.04)	(2.04)	$ 873	0.000007	
Respiratory - High	585,015	15,943	3%	-	0%	422.17	614.34	0.06	(2.00)	(2.00)	$ 1,016	0.000008	
Disabled	341,251	3,783	1%	1,474	257%	439.05	609.05	0.06	(1.69)	(1.69)	$ 1,005	0.000029	

Customer Segments:

Notes:

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

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

[3] Includes only households that SCE contacted by direct mail or email campaigns for CY2021 and CY2022. Customers could also have been contacted multiple times within a year. They could also be contacted by other means, such as by contractors or another utility, which is not reflected in this value. SCE only tracks its direct mail and email campaign efforts.

[4] Data for Tribal and Veterans was not captured in 2022. SCE database/forms was updated to collect Veterans and Tribal data, effective Jan 2023. However, we are currently using data on Tribal areas obtained from the Low-Income Energy Affordability Data Tool Map (https://lead.openei.org) which identifies Tribal areas by census tract location.

Tribal / Veterans

Hard to Reach

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

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

Vulnerable

CARB Communities

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

Disconnected

[8] Based on calendar year 2021

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

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

High Energy Burden

[9] 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).

SEVI

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

Affordability Ratio

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

Respiratory

[12] Based on Asthma percentile score in CalEnviroScreen 4.0.

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

ESA MFWB

Customer Segments	# of Properties Eligible	# of Properties Treated	Enrollment Rate = (C/B)	# of Properties Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Properties (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Properties (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Properties	Avg. Energy Savings (Therms) Per Treated Properties (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Properties (Energy Saving Measures only)	Avg. Cost Per Treated Properties	Avg. Properties Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. Properties Energy Savings (Therms) / Total Annual Energy Use (Therms)
Demographic													
Housing Type			0%		0%								
SF			0%		0%								
MH			0%		0%								
MF In-Unit			0%		0%								
Rent vs. Own			0%		0%								
Own			0%		0%								
Rent			0%		0%								
Previous vs. 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 7 (example)			0%		0%								
Climate Zone 10 (example)			0%		0%								
Climate Zone 14 (example)			0%		0%								
Climate Zone 15 (example)			0%		0%								
CARB Communities			0%		0%								
Financial													
CARE			0%		0%								
Disconnected			0%		0%								
Arrearages			0%		0%								
High Usage			0%		0%								
High Energy Burden			0%		0%								
SEVI			0%		0%								
Affordability Ratio			0%		0%								
Health Condition													
Medical Baseline			0%		0%								
Respiratory			0%		0%								
Disabled			0%		0%								

Note: ESA MFWB reporting will be populated in the 2023 annual report results.

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Pilot Plus and Pilot Deep

Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Enrollment Rate = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households	Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms)
Demographic													
Housing Type			0%		0%								
SF			0%		0%								
MH			0%		0%								
MF In-Unit			0%		0%								
Rent vs. Own			0%		0%								
Own			0%		0%								
Rent			0%		0%								
Previous vs. 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 7 (example)			0%		0%								
Climate Zone 10 (example)			0%		0%								
Climate Zone 14 (example)			0%		0%								
Climate Zone 15 (example)			0%		0%								
CARB Communities			0%		0%								
Financial													
CARE			0%		0%								
Disconnected			0%		0%								
Arrearages			0%		0%								
High Usage			0%		0%								
High Energy Burden			0%		0%								
SEVI			0%		0%								
Affordability Ratio			0%		0%								
Health Condition													
Medical Baseline			0%		0%								
Respiratory			0%		0%								
Disabled			0%		0%								

Note: Pilot Plus and Pilot Deep reporting will be populated in the 2023 annual report results.

Building Electrification (SCE Only)

Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Enrollment Rate = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households	Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms)
Demographic													
Housing Type			0%		0%								
SF			0%		0%								
MH			0%		0%								
MF In-Unit			0%		0%								
Rent vs. Own			0%		0%								
Own			0%		0%								
Rent			0%		0%								
Previous vs. 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 7 (example)			0%		0%								
Climate Zone 10 (example)			0%		0%								
Climate Zone 14 (example)			0%		0%								
Climate Zone 15 (example)			0%		0%								
CARB Communities			0%		0%								
Financial													
CARE			0%		0%								
Disconnected			0%		0%								
Arrearages			0%		0%								
High Usage			0%		0%								
High Energy Burden			0%		0%								
SEVI			0%		0%								
Affordability Ratio			0%		0%								
Health Condition													
Medical Baseline			0%		0%								
Respiratory			0%		0%								
Disabled			0%		0%								

Note: Building Electrification reporting will be populated in the 2023 annual report results.

Southern California Edison PY 2022 CARE Annual Report
CARE Table 1
Overall Program Expenses

Category	Overall Expenditures		Total	Authorized Budget[1]	% of Budget Spent	Total Shifted[2]	Shifted to/from?
	Electric	Gas					
Outreach	$ 3,315,009		$ 3,315,009	$ 3,724,630	89%	$ (210,234)	To Verification and Measurement & Evaluation
Processing, Certification, Recertification	$ 1,277,364		$ 1,277,364	$ 1,530,979	83%		
Post Enrollment Verification	$ 661,415		$ 661,415	$ 483,467	137%	$ 177,948	From Outreach
IT Programming	$ 29,873		$ 29,873	$ 570,000	5%		
CHANGES Program	$ 490,735		$ 490,735	$ 525,000	93%		
Measurement & Evaluation	$ 68,286		$ 68,286	$ 36,000	190%	$ 32,286	Carried forward 2021
Regulatory Compliance	$ 221,129		$ 221,129	$ 478,809	46%		
General Administration	$ 1,194,025		$ 1,194,025	$ 1,337,746	89%		
CPUC Energy Division	$ 118,816		$ 118,816	$ 135,625	88%		
TOTAL Program Costs	**$ 7,376,652**	**$ -**	**$ 7,376,652**	**$ 8,822,256**	**84%**	**$0**	
CARE Rate Discount	$ 666,223,958		**$ 666,223,958**	$ 404,343,437	165%	$ -	
Service Establishment Charge Discount	$ -	$ -	**$ -**	$ -		$ -	
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	**$ 673,600,610**	**$ -**	**$ 673,600,610**	**$ 413,165,693**	**163%**	**$0**	

[1] Reflects total authorized funding approved in D.21-06-015, Attachment 1, Table 2.

[2] Reflects fund shift in accordance with the rules set forth in D. 08-11-031 as modified by D. 10-10-008, D. 10-16-11-022, D 17-12-009 and D.21-06-015, which granted the IOUs authority to shift funds between the CARE program categories.

Southern California Edison PY 2022 CARE Annual Report CARE Table 2 Enrollment, Recertification, Attrition, & Penetration

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment		Total CARE Participants by Dwelling Type[6]			Total CARE Participants	Estimated CARE Eligible	Enrollment Rate % (W/X)
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic[5]	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)	SF	MF	MH			
	Inter-Utility[1]	Intra-Utility[2]	Leveraging[3]	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																		
January	687	2	0	689	8,158	5,225	10,172	186	23,741	24,430	16,741	13,074	0	29,815	1,236	0	17	78,262	79,515	54,245	-55,085				1,348,032	1,276,922	106%
February	734	26	0	760	8,212	12,214	10,119	195	30,740	31,500	13,982	6,551	0	20,533	836	1	17	68,407	69,261	52,033	-37,761				1,311,125	1,276,922	103%
March	222	6	0	228	7,804	9,205	12,373	226	29,608	29,836	11,408	4,624	0	16,032	6,698	4	13	69,674	76,389	45,868	-46,553				1,271,287	1,276,922	100%
April	239	6	0	245	7,680	3,768	8,525	199	20,172	20,417	9,433	8,496	0	17,929	6,520	4	6	36,895	43,425	38,346	-23,008				1,254,809	1,276,922	98%
May	178	1	0	179	7,462	1,846	7,236	300	16,844	17,023	9,050	7,785	0	16,835	1,911	1	10	24,383	26,305	33,858	-9,282				1,247,449	1,276,922	98%
June	160	266	0	426	10,336	2,309	9,317	274	22,236	22,662	15,327	8,139	0	23,466	3,311	4	15	50,174	53,504	46,128	-30,842				1,219,937	1,276,922	96%
July	101	104	0	205	15,070	3,724	12,649	264	31,707	31,912	17,527	6,971	0	24,498	2,189	6	4	58,732	60,931	56,410	-29,019				1,193,117	1,276,922	93%
August	112	1	0	113	19,040	6,441	16,184	290	41,955	42,068	24,014	5,938	0	29,952	4,912	11	13	47,129	52,065	72,020	-9,997				1,188,056	1,276,922	93%
September	91	0	0	91	18,007	7,531	13,997	372	39,907	39,998	22,787	7,225	0	30,012	6,232	1	13	37,876	44,122	70,010	-4,124				1,190,178	1,276,922	93%
October	72	4	0	76	17,013	13,666	10,198	371	41,248	41,324	18,752	6,919	0	25,671	6,050	6	16	38,627	44,699	66,995	-3,375				1,192,875	1,276,922	93%
November	72	2	0	74	12,197	8,486	5,877	162	26,722	26,796	17,732	5,583	0	23,315	9,116	9	11	50,492	59,628	50,111	-32,832				1,169,179	1,276,922	92%
December	81	186	0	267	11,950	6,786	7,010	167	25,913	26,180	10,855	4,905	0	15,760	6,794	16	5	30,173	36,988	41,940	-10,808				1,165,186	1,276,922	91%
YTD Total	**2,749**	**604**	**0**	**3,353**	**142,929**	**81,201**	**123,657**	**3,006**	**350,793**	**354,146**	**187,608**	**86,210**	**0**	**273,818**	**55,805**	**63**	**140**	**590,824**	**646,832**	**627,964**	**-292,686**	**604,178**	**346,825**		**1,165,186**	**1,276,922**	**91%**

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 CARE auto-recertification process implemented in January 2023.

6 Dwelling type extrapolated from Acxiom which includes only Single Family and Multi-Family. Only accounts that can be tied back to a customer contract number is included.

Southern California Edison PY 2022 CARE Annual Report
CARE Table 3A - Post-Enrollment Verification Results (Model) 2022

Month	Total CARE Households Enrolled	Households Requested to Verify[1]	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible)[2]	Total Households De-enrolled[3]	% De-enrolled through Post Enrollment Verification[4]	% of Total CARE Households De-enrolled
January	1,348,032	0	0.00%	0	0	0	0%	0.00%
February	1,311,125	0	0.00%	0	0	0	0%	0.00%
March	1,271,287	177	0.01%	154	0	154	87%	0.01%
April	1,254,809	0	0.00%	0	0	0	0%	0.00%
May	1,247,449	5,218	0.42%	4,282	8	4,290	82%	0.34%
June	1,219,937	6,081	0.50%	4,995	9	5,004	82%	0.41%
July	1,193,117	6,630	0.56%	3,956	4	3,960	60%	0.33%
August	1,188,056	5,935	0.50%	4,908	5	4,913	83%	0.41%
September	1,190,178	3,060	0.26%	2,295	9	2,304	75%	0.19%
October	1,192,875	3,957	0.33%	3,048	6	3,054	77%	0.26%
November	1,169,179	6,963	0.60%	5,697	6	5,703	82%	0.49%
December	1,165,186	7,833	0.67%	2,771	1	2,772	35%	0.24%
YTD Total	**1,165,186**	**45,854**	**3.94%**	**32,106**	**48**	**32,154**	**70%**	**2.76%**

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

Southern California Edison PY 2022 CARE Annual Report

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

Month	Total CARE Households Enrolled	Households Requested to Verify [1]	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) [2]	Total Households De-enrolled [3]	% De-enrolled through HUV Post Enrollment Verification	% of Total CARE Households De-enrolled
January	1,348,032	6,796	0.50%	6,073	2	6,075	89%	0.45%
February	1,311,125	6,717	0.51%	6,036	6	6,042	90%	0.46%
March	1,271,287	1,355	0.11%	1,253	1	1,254	93%	0.10%
April	1,254,809	935	0.07%	850	1	851	91%	0.07%
May	1,247,449	1,929	0.15%	1,675	11	1,686	87%	0.14%
June	1,219,937	1,562	0.13%	1,355	3	1,358	87%	0.11%
July	1,193,117	627	0.05%	566	0	566	90%	0.05%
August	1,188,056	1,587	0.13%	1,426	2	1,428	90%	0.12%
September	1,190,178	2,482	0.21%	2,014	10	2,024	82%	0.17%
October	1,192,875	4,700	0.39%	4,228	3	4,231	90%	0.35%
November	1,169,179	1,581	0.14%	1,421	1	1,422	90%	0.12%
December	1,165,186	794	0.07%	695	0	695	88%	0.06%
YTD Total	**1,165,186**	**31,065**	**2.67%**	**27,592**	**40**	**27,632**	**89%**	**2.37%**

[1] Includes all participants who were selected for high usage verification process.
[2] Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.
[3] Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.

Southern California Edison PY 2022 CARE Annual Report

CARE Table 4
CARE Self-Certification and Self-Recertification Applications[1]

	Provided	Received	Approved	Denied	Pending/Never Completed [2]	Duplicates
Total (Y-T-D)	6,886,318	669,354	619,018	50,336	40,100	0
Percentage [3]		100%	92%	8%	0%	0%

[1] Includes sub-metered customers.

[2] Estimated number of outstanding enrollments. Number not included in receipt column.

[3] Only includes applications received by SCE's processing team.

Southern California Edison PY 2022 CARE Annual Report

CARE Table 5
CARE Enrollment by County

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

[1] Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.

[2] Total Households enrolled includes submetered tenants

Southern California Edison PY 2022 CARE Annual Report

CARE Table 6
CARE Recertification
Results

2022	Total CARE Households	Households Requested to Recertify [1]	% of Households Total (C/B)	Households Recertified [2], [5]	Households De-enrolled [3]	Recertification Rate % [4] (E/C)	% of Total Households De-enrolled (F/B)
January	1,348,032	14,155	1.1%	11,621	2,534	82%	0.19%
February	1,311,125	11,810	0.9%	9,824	1,986	83%	0.15%
March	1,271,287	9,849	0.8%	8,354	1,495	85%	0.12%
April	1,254,809	11,446	0.9%	9,830	1,616	86%	0.13%
May	1,247,449	13,438	1.1%	11,536	1,902	86%	0.15%
June	1,219,937	8,047	0.7%	6,946	1,101	86%	0.09%
July	1,193,117	16,732	1.4%	14,832	1,900	89%	0.16%
August	1,188,056	24,229	2.0%	21,638	2,591	89%	0.22%
September	1,190,178	22,942	1.9%	20,877	2,065	91%	0.17%
October	1,192,875	21,947	1.8%	20,332	1,615	93%	0.14%
November	1,169,179	13,284	1.1%	12,654	630	95%	0.05%
December	1,165,186	6,692	0.6%	6,371	321	95%	0.03%
YTD	**1,165,186**	**174,571**	**14.98%**	**154,815**	**19,756**	**89%**	**1.70%**

[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 (3 or 4 bill cycles) to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.

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

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

Southern California Edison PY 2022 CARE Annual Report CARE Table 7 CARE Capitation Contractors

Contractor Name [1]	Contractor Type (Check one or more if applicable)				Enrollments [2]			Total Expenditures
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
2-1-1 ORANGE COUNTY		x			15	95	110	$ 3,300
ALPHA ENTERPRISES		x			-	-	-	$ -
APAC SERVICE CENTER	x				-	68	68	$ 2,040
ARMENIAN RELIEF SOCIETY	x				-	-	-	$ -
ASIAN AMERICAN DRUG ABUSE PROG	x				-	-	-	$ -
ASIAN AMERICAN RESOURCE CENTER	x		x		-	10	10	$ 300
ASIAN YOUTH CENTER	x				-	-	-	$ -
BEST PARTNERS	x				51	2,460	2,511	$ 75,330
BETHEL BAPTIST CHURCH	x				-	-	-	$ -
DELHI CENTER	x				-	-	-	$ -
BETHEL BAPTIST CHURCH	x				-	-	-	$ -
BISHOP PAIUTE TRIBE	x				2	2	4	$ 120
C.O.R. COMM DEVELOPMENT CORP	x				1	-	1	$ 30
CAREGIVERS VOLUNTEERS ELDERLY		x			-	1	1	$ 30
CHINESE CHRISTIAN HERALD CRUS.	x				-	-	-	$ -
CHINO NEIGHBORHOOD HOUSE		x			-	-	-	$ -
CITIHOUSING REAL ESTATE SERVIC		x			-	-	-	$ -
CITY IMPACT	x				-	-	-	$ -
CITY OF BEAUMONT SENIOR CENTER		x	x		-	-	-	$ -
COMMUNITY HEALTH INITIATIVE of OC		x			-	-	-	$ -
DESERT COMMUNITY ENERGY		x			-	-	-	$ -
DESERT MANNA MINISTRIES INC	x				-	-	-	$ -
DISABLED RESOURCES CTR, INC		x	x		-	32	32	$ 960
EL CONCILIO DEL CONDADO DE	x		x		-	-	-	$ -
FAMILY SVC ASSOC OF REDLANDS	x				-	-	-	$ -
FOOD SHARE	x				-	-	-	$ -
GO THE CALENDAR		x			-	-	-	$ -
GRID ALTERNATIVES INLAND EMPIRE INC			x		18	-	18	$ 540
HELP OF OJAI, INC.	x				-	-	-	$ -
HOUSING AUTHORITY OF KINGS CO	x		x		-	-	-	$ -
INLAND SOCAL 211+	x	x			56	97	153	$ 4,590
KERNVILLE UNION SCHOOL DISTRIC	x				-	-	-	$ -
KINGS COMMUNTITY ACTION ORG	x				-	-	-	$ -
KINGS CTY COMMISSION ON AGING	x				-	-	-	$ -
LA COUNTY HOUSING AUTHORITY		x			-	-	-	$ -
LEAGUE OF CALIF HOMEOWNERS	x				-	-	-	$ -
LIFT TO RISE	x				-	-	-	$ -
LTSC COMM. DEVEL. CORP	x				-	4	4	$ 120
MENIFEE VALLEY CHAMBER OF COMMERCE		x			-	-	-	$ -
MEXICAN AMERICAN OPPORTUNITY		x	x		-	-	-	$ -
MILANA I LLC					1	-	1	$ 30
MTN COMM FAM RESOURCE CNTR	x				1	1	2	$ 60
NEW GREATER CIR. MISSION, INC	x				-	-	-	$ -
NEW HOPE VILLAGE, INC	x				-	1	1	$ 30
NEW HORIZONS CAREGIVERS GROUP		x			-	5	5	$ 150
OCCC	x				-	-	-	$ -
OPERATION GRACE	x				-	-	-	$ -
OUR COMMUNITY WORKS	x				-	79	79	$ 2,370
PACIFIC ISLANDER HLTH (PIHP)	x				-	-	-	$ -
PACIFIC PRIDE FOUNDATION	x				-	-	-	$ -
PRM CONSULTING INC.	x	x	x		-	-	-	$ -
RIVERSIDE DEPT COMM ACTION		x	x	x	-	-	-	$ -
SALVATION ARMY SANTA FE SPGS	x				-	-	-	$ -
SALVATION ARMY VISALIA CORPS	x				-	-	-	$ -
SANTA ANITA FAMILY SERVICE	x				-	-	-	$ -
SENIOR ADVOCATES OF THE DESERT	x				-	-	-	$ -
SHARE OUR SELVES	x				-	-	-	$ -
SHIELDS FOR FAMILIES	x	x			-	6	6	$ 180
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 and Expenditures					**145**	**2,861**	**3,006**	**$ 90,180**

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

[2] Enrollments reflect new enrollments only.

Southern California Edison PY 2022 CARE Annual Report

CARE Table 8
CARE Participants as of Month-End

2022	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Enrollment Rate	% Change
January			1,348,032	1,348,032	1,276,922	106%	
February			1,311,125	1,311,125	1,276,922	103%	-2.89%
March			1,271,287	1,271,287	1,276,922	100%	-3.12%
April			1,254,809	1,254,809	1,276,922	98%	-1.29%
May			1,247,449	1,247,449	1,276,922	98%	-0.58%
June			1,219,937	1,219,937	1,276,922	96%	-2.15%
July			1,193,117	1,193,117	1,276,922	93%	-2.10%
August			1,188,056	1,188,056	1,276,922	93%	-0.40%
September			1,190,178	1,190,178	1,276,922	93%	0.17%
October			1,192,875	1,192,875	1,276,922	93%	0.21%
November			1,169,179	1,169,179	1,276,922	92%	-1.86%
December			1,165,186	1,165,186	1,276,922	91%	-0.31%

Southern California Edison PY 2022 CARE Annual Report
CARE Table 9
CARE Average Monthly Usage & Bill

Average Monthly Gas / Electric Usage
Residential Non-CARE vs. CARE Customers

Customer	Gas Therms Tier 1	Gas Therms Tier 2	Total
Non-CARE	53.8	3.1	56.9
CARE	10.9	0.5	11.4
Customer	**Electric KWh Tier 1**	**Electric KWh Tier 2 and Above**	**Total**
Non-CARE	355	188	543
CARE	375	155	530

Average Monthly Gas / Electric Bill		
Residential Non-CARE vs. CARE Customers[1]		
(Dollars per Customer)		
Customer	**Gas**	**Electric**
Non-CARE	$64.15	$141.73
CARE	$44.67	$89.95

[1] Excludes master-meter usage.

Southern California Edison PY 2022 CARE Annual Report
CARE Table 10
CARE Surcharge & Revenue
Electric
CARE Surcharge and Revenue Collected by Customer Class

Customer	Average Monthly		CARE Surcharge	Total CARE Surcharge Revenue	Percentage of CARE Surcharge
Class	CARE Surcharge[1]	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential	$18,028,490	$581,363,208	3.10%	$216,341,885	29.0%
Agricultural	$1,427,529	$27,854,988	5.12%	$17,130,350	2.3%
Commercial	$35,823,996	$618,441,498	5.79%	$429,887,948	57.6%
Industrial	$3,746,034	$45,607,454	8.21%	$44,952,403	6.0%
Public Authority	$3,081,422	$47,944,587	6.43%	$36,977,065	5.0%
Railroads	$51,813	$993,443	5.22%	$621,753	0.1%
Interdepartment[1]	$2,051	$38,630	5.31%	$24,613	0.0%
Total	$62,161,335	$1,322,243,807	39.18%	$745,936,016	100.0%

GAS
CARE Surcharge and Revenue Collected by Customer Class

Customer	Average Monthly		CARE Surcharge	Total CARE Surcharge Revenue	Percentage of CARE Surcharge
Class	CARE Surcharge[2]	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential	$19,866	$70,432	28.21%	$238,392	21.30%
Commercial	$73,384	$159,237	46.09%	$880,614	78.70%
Natural Gas Vehicle	$0	$0	0.00%	$0	0.00%
Industrial	$0	$0	0.00%	$0	0.00%

[1] Excludes CARE customers. Pursuant to D. 15-07-001, OP 4 and Section 11.1.1 authorizes adjustments to CARE to transition to the legislatively-mandated CARE discount range in compliance with Section 739.1 were authorized. Effective 9/1/15 per AL 2783-E, CARE customers receive non-CARE rates; therefore, there is no longer a CARE Rate subsidy.

[2] Excludes CARE customers.

CARE Table 11
CARE Capitation Applications[1]

Entity	Total Received	Approved[2]	Denied	Pending/ Never Completed	Duplicate
2-1-1 ORANGE COUNTY	121	121	0	0	0
APAC SERVICE CENTER	67	67	0	0	0
ASIAN AMERICAN RESOURCE CENTER	10	10	0	0	0
BEST PARTNERS	2,684	2,682	2	0	0
BISHOP PAIUTE TRIBE	4	4	0	0	0
C.O.R. COMM DEVELOPMENT CORP	1	1	0	0	0
DISABLED RESOURCES CTR, INC	34	34	0	0	0
GRID Alternatives Inland Empire Inc	20	20	0	0	0
INLAND SOCAL 211+	155	155	0	0	0
LTSC COMM. DEVEL. CORP	4	4	0	0	0
MTN COMM FAM RESOURCE CNTR	2	2	0	0	0
NEW HOPE VILLAGE, INC	1	1	0	0	0
OUR COMMUNITY WORKS	78	78	0	0	0
PRM Consulting, Inc.	4	4	0	0	0
SHIELDS FOR FAMILIES	6	6	0	0	0
Total	**3,191**	**3,189**	**2**	**0**	**0**

[1] Includes sub-metered customers.

[2] Includes new enrollments and recertification applications approved.

Southern California Edison PY 2022 CARE Annual Report

CARE Table 12
CARE Expansion Program

Participating Facilities by Month

2022	Gas			Electric		
	CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
January	0	0	0	370	118	488
February	0	0	0	284	99	383
March	0	0	0	362	125	487
April	0	0	0	340	120	460
May	0	0	0	391	127	518
June	0	0	0	401	133	534
July	0	0	0	355	126	481
August	0	0	0	385	132	517
September	0	0	0	380	130	510
October	0	0	0	369	125	494
November	0	0	0	367	123	490
December	0	0	0	392	130	522

Average Monthly Gas / Electric Usage[1]		
Customer	**Gas**	**Electric**
	Therms	**KWh**
Residential Facilities	N/A	921
Commercial Facilities	N/A	14,473

CARE Expansion Self-Certification and Self-Recertification Applications					
	Received	**Approved**	**Denied**	**Pending/Never Completed**	**Duplicates**
Total	119	84	34	20	0
Percentage		71%	29%	17%	0%

[1] Excludes master meter usage.

Southern California Edison PY 2022 CARE Annual Report

CARE Table 13
CARE High Usage Verification Results[5]

Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring		
Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible)[1]	Income Verified and Referred to ESA	Failed and Removed[2]	Ineligible[3]	Completed	Removed[4]	Appeals Denied	Appeals Approved
31,065	27,592	40	428	82	68	202	405	0	0

[1] Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.

[2] Includes customers who declined to participate in ESA Program, failed to respond to appointment requests, or missed multiple appointments or denied access to all rooms.

[3] Includes customers who previously participated in ESA Program, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.

[4] Customers removed for exceeding 600% of baseline in any monthly billing cycle.

[5] High usage is defined as a customer that exceeds 400% or 600% of baseline.

Southern California Edison PY 2022 CARE Annual Report
CARE Table 13A
CARE Customer Usage and ESA Program Treatment

# of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV [1]	Percent of those CARE customers Not served by ESA Program [2]	# of Enrollments led to ESA Program measure Installations	# of Long-Term tenancy CARE customers who have Not applied for ESA Program	Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment				Energy Usage of CARE customers who do Not accept ESA Program treatment[3]
				Energy Usage before ESA Program treatment[3]	Energy Usage within 3-months of ESA Program treatment	Energy Usage within 6-months of ESA Program treatment	Energy Usage within 12-months of ESA Program treatment	
152,894	33%	40,683	102,054	2,859	3,023	6,749	11,563	1,053

[1] Those CARE customers who have been on CARE reate at the same meter for a least six years.
[2] Those CARE customers who have not participated in the ESA Program prior to receiving targeted marketing.
[3] Energy usage based on 3 month average prior to ESA
[4] Based on monthly average energy usage.

CARE Table 14 Categorical Enrollment

Type of Enrollment	Number of Customer Enrollments[1]
Bureau of Indian Affairs General Assistance	392
CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	102,099
CalWORKs/Temporary Assistance for Needy Families (TANF) [2]	
Head Start Income Eligible - (Tribal Only)	1,009
Healthy Families A&B [3]	
Low-income Home Energy Assistance Program (LIHEAP)	6,774
Medicaid/Medi-Cal	209,442
National School Lunch Program (NSLP) - Free Lunch	52,257
Supplemental Security Income (SSI)	37,888
Tribal TANF [2]	13,002
Women, Infants, and Children Program (WIC)	40,028

[1] Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account.

[2] CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.

[3] Healthy Families A&B are bundled with Medi-Cal for Families.

Southern California Edison PY 2022 CARE Annual Report

CARE Table 15
CARE and Disadvantage Communities Enrollment Rate for Zip Codes

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

Note:
Penetration Rate and Enrollment Rate are the same value.

DACs are defined at the census tract level. Corresponding zip codes are provided for the purpose of this table; however, the entire zip code listed may not be considered a DAC.
Reporting started July 2022.

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

Southern California Edison PY 2022 FERA
Annual Report FERA Table 1
Overall Program Expenses

Category	Overall Expenditures		Total	Authorized Budget[1]	% of Budget Spent	Total Shifted[2]	Shifted to/from?
	Electric	Gas					
Outreach	$ 807,070		$ 807,070	$ 665,695	121%	$ 141,375	From Processing, Certification, and Recertification
Processing, Certification, Recertification	$ 30,463		$ 30,463	$ 382,745	8%	$ (141,375)	To Outreach
Post Enrollment Verification	$ 13,849		$ 13,849	$ 120,867	11%		
IT Programming	$ 7,036		$ 7,036	$ 30,000	23%		
Pilots	$ -		$ -	$ -	0%		
Measurement & Evaluation	$ -		$ -	$ 24,000	0%		
Regulatory Compliance	$ -		$ -	$ 15,445	0%		
General Administration	$ 18,254		$ 18,254	$ 43,153	42%		
CPUC Energy Division	$ -		$ -	$ 4,375	0%		
TOTAL Program Costs	**$ 876,673**	**$ -**	**$ 876,673**	**$ 1,286,280**	**68%**	**$0**	
FERA Rate Discount[3]	$ 11,482,677		**$ 11,482,677**	$ 28,746,536	40%	$ -	
Service Establishment Charge Discount	$ -	$ -	**$ -**	$ -	0%	$ -	
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	**$ 12,359,350**	**$ -**	**$ 12,359,350**	**$ 30,032,816**	**41%**	**$0**	

[1] Reflects total authorized funding approved in D.21-06-015, Attachment 1, Table 4.
[2] Reflects fund shift in accordance with the rules set forth in D.21-06-015, which granted the IOUs authority to shift funds between the FERA program categories.
[3] FERA Discount amount reflected in Advice Letter 3849-E, effective January 1, 2022.

Southern California Edison PY 2022 FERA Annual Report
FERA Table 2
Enrollment, Recertification, Attrition, & Penetration

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment		Total FERA Participants by Dwelling Type[6]			Total FERA Participants	Estimated FERA Eligible	Enrollment Rate % (W/X)
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic[5]	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)	SF	MF	MH			
	Inter-Utility [1]	Intra-Utility [2]	Leveraging [3]	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																		
January	0	0	0	0	353	88	185	0	626	626	160	440	0	600	16	0	4	1,539	1,559	1,226	-933				28,380	221,674	13%
February	0	0	0	0	341	225	127	0	693	693	126	250	0	376	18	0	1	1,392	1,411	1,069	-718				27,681	221,674	12%
March	0	0	0	0	319	159	213	3	694	694	117	184	0	301	30	0	0	1,934	1,964	995	-1,270				26,441	221,674	12%
April	0	0	0	0	310	79	169	1	559	559	131	322	0	453	23	0	2	813	838	1,012	-279				26,187	221,674	12%
May	0	0	0	0	291	27	125	2	445	445	108	304	0	412	69	0	1	588	658	857	-213				26,044	221,674	12%
June	0	0	0	0	335	20	146	0	501	501	159	268	0	427	34	0	0	1,187	1,221	928	-720				25,358	221,674	11%
July	2	0	0	2	760	52	210	1	1,023	1,025	158	274	0	432	38	1	1	1,592	1,632	1,457	-607				24,791	221,674	11%
August	1	0	0	1	1,066	98	330	1	1,495	1,496	212	225	0	437	112	0	0	1,442	1,554	1,933	-58				24,845	221,674	11%
September	0	0	0	0	1,065	87	293	0	1,445	1,445	201	221	0	422	140	0	2	939	1,081	1,867	364				25,351	221,674	11%
October	0	0	0	0	998	215	223	1	1,437	1,437	209	212	0	421	135	0	0	960	1,095	1,858	342				25,828	221,674	12%
November	0	0	0	0	701	130	122	0	953	953	167	184	0	351	179	1	1	812	993	1,304	-40				25,969	221,674	12%
December	0	0	0	0	589	93	132	0	814	814	105	153	0	258	108	0	0	671	779	1,072	35				26,112	221,674	12%
YTD Total	**3**	**0**	**0**	**3**	**7,128**	**1,273**	**2,275**	**9**	**10,685**	**10,688**	**1,853**	**3,037**	**0**	**4,890**	**902**	**2**	**12**	**13,869**	**14,785**	**15,578**	**-4,097**	**16,344**	**5,774**		**26,112**	**221,674**	**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] FERA auto-recertification process implemented in January 2023.
[6] Dwelling type extrapolated from Acxiom which includes only Single Family and Multi-Family. Only accounts that can be tied back to a customer contract number is included.

Southern California Edison PY 2022 FERA Annual Report
FERA Table 3A - Post-Enrollment Verification Results (Model) 2022

Month	Total FERA Households Enrolled	Households Requested to Verify[1]	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible)[2]	Total Households De-enrolled[3]	% De-enrolled through Post Enrollment Verification[4]	% of Total FERA Households De-enrolled
January	28,380	0	0.00%	0	0	0	0%	0.00%
February	27,681	0	0.00%	0	0	0	0%	0.00%
March	26,441	3	0.01%	2	0	2	67%	0.01%
April	26,187	0	0.00%	0	0	0	0%	0.00%
May	26,044	115	0.44%	93	0	93	81%	0.36%
June	25,358	152	0.60%	119	1	120	79%	0.47%
July	24,791	681	2.75%	131	0	131	19%	0.53%
August	24,845	167	0.67%	133	1	134	80%	0.54%
September	25,351	75	0.30%	64	0	64	85%	0.25%
October	25,828	425	1.65%	332	2	334	79%	1.29%
November	25,969	194	0.75%	172	1	173	89%	0.67%
December	26,112	288	1.10%	123	1	124	43%	0.47%
YTD Total	**26,112**	**2,100**	**8.04%**	**1,169**	**6**	**1,175**	**56%**	**4.50%**

[1] Includes all customers who failed SCE's FERA eligibility probability model.

[2] Includes customers verified as over income or who requested to be de-enrolled.

[3] Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request. Results may be pending due to the time permitted for a participant to respond.

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

Southern California Edison PY 2022 FERA Annual Report

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

Month	Total FERA Households Enrolled	Households Requested to Verify[1]	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible)[2]	Total Households De-enrolled[3]	% De-enrolled through Post Enrollment Verification	% of Total FERA Households De-enrolled
January	28,380	17	0.06%	16	0	16	94%	0.06%
February	27,681	12	0.04%	12	0	12	100%	0.04%
March	26,441	57	0.22%	55	0	55	96%	0.21%
April	26,187	3	0.01%	3	0	3	100%	0.01%
May	26,044	13	0.05%	12	0	12	92%	0.05%
June	25,358	22	0.09%	21	0	21	95%	0.08%
July	24,791	3	0.01%	3	0	3	100%	0.01%
August	24,845	15	0.06%	14	0	14	93%	0.06%
September	25,351	22	0.09%	18	0	18	82%	0.07%
October	25,828	35	0.14%	32	0	32	91%	0.12%
November	25,969	10	0.04%	10	0	10	100%	0.04%
December	26,112	8	0.03%	8	0	8	100%	0.03%
YTD Total	**26,112**	**217**	**0.83%**	**204**	**0**	**204**	**94%**	**0.78%**

[1] Includes all participants who were selected for high usage verification process.

[2] Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

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

Southern California Edison PY 2022 FERA Annual Report
FERA Table 4

FERA Self-Certification and Self-Recertification Applications[1]

	Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	5,695,011	15,870	14,391	1,479	0	0
Percentage		100%	91%	9%	0%	0%

[1] Includes sub-metered customers.

FERA Table 4A
FERA Post-Enrollment Verification[1]

	Requested	Received	Approved	Denied	Pending/Never Completed	
Total	2,317	974	469	505	0	

[1] Includes sub-metered customers.

Southern California Edison PY 2022 FERA Annual Report
FERA Table 5
FERA Enrollment by County

County	Estimated Eligible			Total Participants [2]			Enrollment Rate		
	Urban	Rural [1]	Total	Urban	Rural	Total	Urban	Rural	Total
Fresno	54	0	54	3	0	3	6%	0%	**6%**
Imperial	0	2	2	0	0	0	0%	0%	**0%**
Inyo	1	155	156	0	24	24	0%	15%	**15%**
Kern	1,665	2,217	3,882	186	197	383	11%	9%	**10%**
Kings	0	1,690	1,690	0	172	172	0%	10%	**10%**
Los Angeles	87,868	506	88,374	9,496	102	9,598	11%	20%	**11%**
Madera	0	0	0	0	0	0	0%	0%	**0%**
Mono	0	456	456	1	20	21	0%	4%	**5%**
Orange	30,801	0	30,801	4,129	0	4,129	13%	0%	**13%**
Riverside	16,418	15,689	32,107	1,970	2,487	4,457	12%	16%	**14%**
San Bernardino	32,937	7,477	40,414	4,115	787	4,902	12%	11%	**12%**
San Diego	0	0	0	0	0	0	0%	0%	**0%**
Santa Barbara	2,331	0	2,331	190	0	190	8%	0%	**8%**
Tulare	2,201	6,766	8,967	215	687	902	10%	10%	**10%**
Ventura	11,956	483	12,439	1,280	51	1,331	11%	11%	**11%**
Total	**186,232**	**35,441**	**221,673**	**21,585**	**4,527**	**26,112**	**12%**	**13%**	**12%**

[1] Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.

[2] Total Households enrolled includes submetered tenants.

Southern California Edison PY 2022 FERA Annual Report FERA
Table 6
FERA Recertification Results

2022	Total FERA Households	Households Requested to Recertify [1]	% of Households Total (C/B)	Households Recertified [2], [5]	Households De-enrolled[3]	Recertification Rate %[4] (E/C)	% of Total Households De-enrolled (F/B)
January	28,380	122	0.4%	107	15	88%	0.05%
February	27,681	110	0.4%	85	25	77%	0.09%
March	26,441	112	0.4%	96	16	86%	0.06%
April	26,187	150	0.6%	125	25	83%	0.10%
May	26,044	149	0.6%	130	19	87%	0.07%
June	25,358	83	0.3%	70	13	84%	0.05%
July	24,791	171	0.7%	153	18	89%	0.07%
August	24,845	196	0.8%	167	29	85%	0.12%
September	25,351	195	0.8%	172	23	88%	0.09%
October	25,828	236	0.9%	220	16	93%	0.06%
November	25,969	123	0.5%	120	3	98%	0.01%
December	26,112	65	0.2%	58	7	89%	0.03%
YTD	**26,112**	**1,712**	**6.56%**	**1,503**	**209**	**88%**	**0.80%**

[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 (3 or 4 bill cycles) to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.

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

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

Southern California Edison PY 2022 FERA Annual Report
FERA Table 7
FERA Capitation Contractors

Contractor Name [1]	Contractor Type (Check one or more if applicable)				Enrollments[2]			Total Expenditures
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
2-1-1 ORANGE COUNTY		x					-	$ -
ALPHA ENTERPRISES		x					-	$ -
APAC SERVICE CENTER	x						-	$ -
ARMENIAN RELIEF SOCIETY	x						-	$ -
ASIAN AMERICAN DRUG ABUSE PROG	x						-	$ -
ASIAN AMERICAN RESOURCE CENTER	x		x				-	$ -
ASIAN YOUTH CENTER	x						-	$ -
BEST PARTNERS	x					1	1	$ 30
BETHEL BAPTIST CHURCH	x						-	$ -
DELHI CENTER	x						-	$ -
BETHEL BAPTIST CHURCH	x						-	$ -
BISHOP PAIUTE TRIBE	x						-	$ -
C.O.R. COMM DEVELOPMENT CORP	x						-	$ -
CAREGIVERS VOLUNTEERS ELDERLY		x					-	$ -
CHINESE CHRISTIAN HERALD CRUS.	x						-	$ -
CHINO NEIGHBORHOOD HOUSE		x					-	$ -
CITIHOUSING REAL ESTATE SERVIC		x					-	$ -
CITY IMPACT	x						-	$ -
CITY OF BEAUMONT SENIOR CENTER		x	x				-	$ -
COMMUNITY HEALTH INITIATIVE of OC		x					-	$ -
DESERT COMMUNITY ENERGY		x					-	$ -
DESERT MANNA MINISTRIES INC	x						-	$ -
DISABLED RESOURCES CTR, INC		x	x				-	$ -
EL CONCILIO DEL CONDADO DE	x		x				-	$ -
FAMILY SVC ASSOC OF REDLANDS	x						-	$ -
FOOD SHARE	x						-	$ -
GO THE CALENDAR		x					-	$ -
GRID ALTERNATIVES INLAND EMPIRE INC			x		3		3	$ 90
HELP OF OJAI, INC.	x						-	$ -
HOUSING AUTHORITY OF KINGS CO	x		x				-	$ -
INLAND SOUTHERN CALIFORNIA 211+	x	x			1		1	$ 30
KERNVILLE UNION SCHOOL DISTRIC	x						-	$ -
KINGS COMMUNTITY ACTION ORG	x						-	$ -
KINGS CTY COMMISSION ON AGING	x						-	$ -
LA COUNTY HOUSING AUTHORITY		x					-	$ -
LEAGUE OF CALIF HOMEOWNERS	x						-	$ -
LIFT TO RISE	x						-	$ -
LTSC COMM. DEVEL. CORP	x						-	$ -
MENIFEE VALLEY CHAMBER OF COMMERCE		x					-	$ -
MEXICAN AMERICAN OPPORTUNITY		x	x				-	$ -
MTN COMM FAM RESOURCE CNTR	x						-	$ -
NEW GREATER CIR. MISSION, INC	x						-	$ -
NEW HOPE VILLAGE, INC	x						-	$ -
NEW HORIZONS CAREGIVERS GROUP		x					-	$ -
OCCC	x						-	$ -
OPERATION GRACE	x						-	$ -
OUR COMMUNITY WORKS	x						-	$ -
PACIFIC ISLANDER HLTH (PIHP)	x						-	$ -
PACIFIC PRIDE FOUNDATION	x						-	$ -
PRM CONSULTING INC.	x	x	x			4	4	$ 120
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 and Expenditures					**4**	**5**	**9**	**$ 270**

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

[2] Enrollments reflect new enrollments only.

FERA Table 8
FERA Average Monthly Usage & Bill

Average Monthly Electric Usage Residential Non-FERA vs. FERA Customers			
Customer	Electric KWh Tier 1	Electric KWh Tier 2 and Above	Total
Non-FERA	59,835	31,507	91,342
FERA	374	267	641

Average Monthly Electric Bill Residential Non-FERA vs. FERA Customers[1] (Dollars per Customer)		
Customer	Electric	
Non-FERA	$255.69	
FERA	$140.07	

[1] Excludes master-meter usage.

Appendix B

2021 ESA/CARE/FERA Annual Report Presentation

Appendix B: ESA, CARE, and FERA 2021 Annual Report Presentation Slides

Overview: In today's Annual Report presentation, the IOUs will highlight key outcomes and takeaways from PY 2021, including lessons learned, and how those lessons learned are informing 2022's activities. Questions and discussion from participants are welcome and encouraged.

Desired outcomes:

- Broad stakeholder engagement into program learnings and planning
- Highlights of program successes, and challenges, helps establish the initial framework for mid-cycle filing
- Robust opportunity for dialogue and thought partnership among IOU and non-IOU participants

Overview of PY 2021: CARE, FERA and ESA

- Decision 21-06-015 was issued in June 2021, and set forth a framework and requirements for a new program cycle, 2021-2026
- As such, PY 2021 was a transition year, as CARE/FERA/ESA wrapped up final year of prior program cycle and began implementing new program cycle elements
- Key program elements that began development in 2021 and continue to the present include:
  - The Pilot Plus and Pilot Deep pilot programs
  - The Multi-family Whole Building Program (MFWB) will replace the ESA CAM program and take responsibility for *all* MF ESA installations, including for qualifying ESA in units that are not part of MF buildings or properties that are being treated
  - New solicitations for all program implementers/contractors
  - The creation of the ESA Working Group and its sub-working groups
  - New reporting requirements for CARE, FERA, and ESA

CARE Program

Presentation order:
PG&E
SCE
SDG&E
SoCalGas
Questions and Discussion: All

PG&E CARE Program – 2021 Highlights

Stats

- 107% Enrollment
- 1.55M total enrollments, with ~241k new enrollments
- Average monthly bill discount:
  - $45 electric/$11 gas

Noteworthy Activities/Outcomes

Expansion of CBO Partnerships

- Proactively created expanded CBO partnership and compensation models, including ~30 new CBO grants for ME&O
  - ~20 in 2021 for COVID-19 support ($70k)
  - ~10 in 2022-23 for ME&O ($500k/year)

Improved Targeting

- Improved propensity model ~30% at decile 1 (predictor of eligibility used for targeted marketing)

Key Changes Implemented in Q3/Q4 after June 2021 Decision

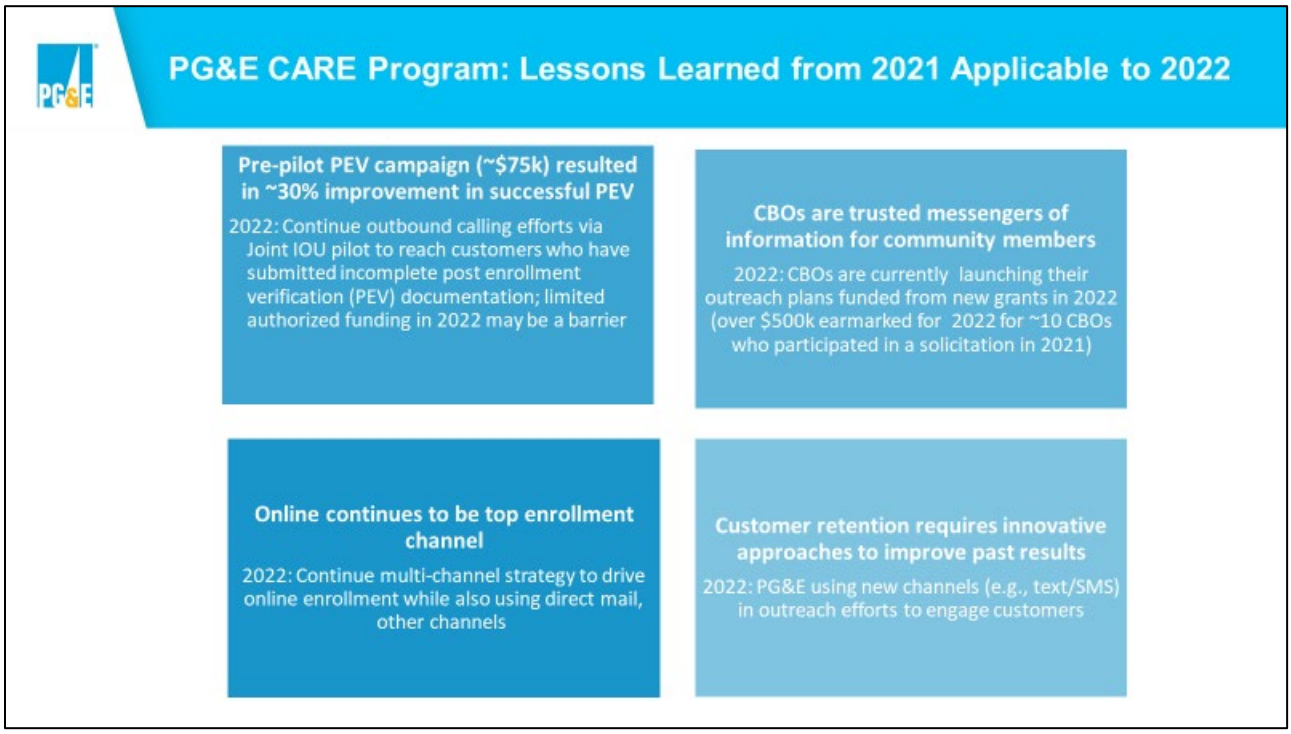
- Inclusion of low-cost internet solutions message in outreach
- High-usage PEV – implemented new definition (3x/year) and alignment of income verification process w/standard PEV
- Launched multiple CBO solicitations to bring in CBOs for ME&O work across IQ program offerings

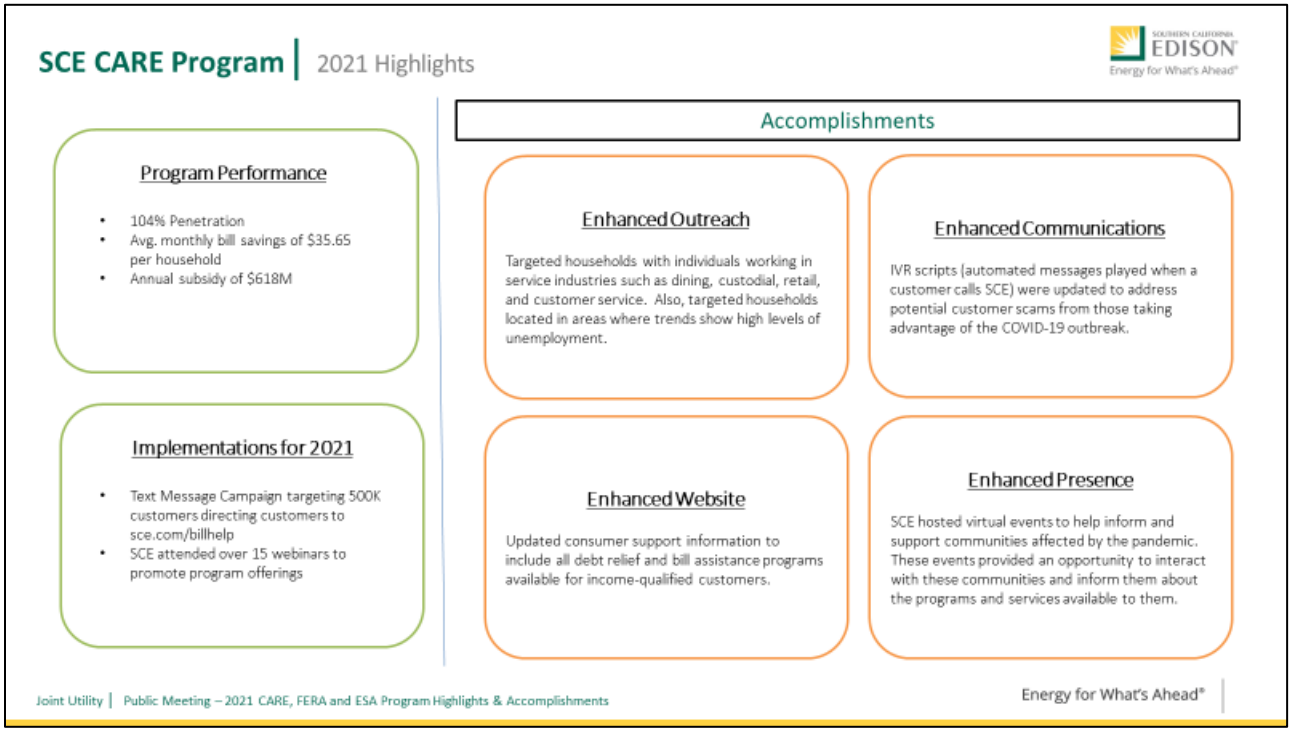
COVID-19 Communication Strategy

- Options for past due accounts as COVID-19 customer protections expired, including the new Arrearage Management Program (AMP)
- Broad outbound calling campaign focused on customers with past due accounts resulted in substantive savings from rate plan changes (~$12M) and LIHEAP pledges (~$250k)

New Communication Methods

- Enhanced Recertification Reminder campaign, introducing texting/SMS to make it easier for customer and improve response rates


PG&E CARE Program: Lessons Learned from 2021 Applicable to 2022
Pre-pilot PEV campaign (~$75k) resulted in ~30% improvement in successful PEV
2022: Continue outbound calling efforts via Joint IOU pilot to reach customers who have submitted incomplete post enrollment verification (PEV) documentation; limited authorized funding in 2022 may be a barrier
CBOs are trusted messengers of information for community members
2022: CBOs are currently launching their outreach plans funded from new grants in 2022 (over $500k earmarked for 2022 for ~10 CBOs who participated in a solicitation in 2021)
Online continues to be top enrollment channel
2022: Continue multi-channel strategy to drive online enrollment while also using direct mail, other channels
Customer retention requires innovative approaches to improve past results
2022: PG&E using new channels (e.g., text/SMS) in outreach efforts to engage customers


SCE CARE Program | 2021 Highlights
EDISON
Energy for What's Ahead®
Program Performance
104% Penetration
Avg. monthly bill savings of $35.65 per household
Annual subsidy of $618M
Implementations for 2021
Text Message Campaign targeting 500K customers directing customers to sce.com/billhelp
SCE attended over 15 webinars to promote program offerings
Accomplishments
Enhanced Outreach
Targeted households with individuals working in service industries such as dining, custodial, retail, and customer service. Also, targeted households located in areas where trends show high levels of unemployment.
Enhanced Communications
IVR scripts (automated messages played when a customer calls SCE) were updated to address potential customer scams from those taking advantage of the COVID-19 outbreak.
Enhanced Website
Updated consumer support information to include all debt relief and bill assistance programs available for income-qualified customers.
Enhanced Presence
SCE hosted virtual events to help inform and support communities affected by the pandemic. These events provided an opportunity to interact with these communities and inform them about the programs and services available to them.
Joint Utility | Public Meeting – 2021 CARE, FERA and ESA Program Highlights & Accomplishments
Energy for What's Ahead®

SCE CARE Program | Lessons Learned

- Digital CBO/FBO Support
  - SCE partnered with CBOs and FBOs who provided CARE, FERA, and ESA in multi-lingual (Spanish, Chinese, Vietnamese, Korean and Tagalog) digital marketing flyers to support a diverse array of constituents through email and newsletters.
  - SCE provided resources and turnkey messages to share through their communication channels such as webinars, email, newsletters, social media posts, and on their organization's website.
- Foodservice Partnership
  - SCE partnered with the West San Gabriel Valley Boys and Girls Club and provided over 1000 meals to prevent food waste and help families who are experiencing food scarcity.
  - In addition to providing meals, informational flyers with programs and support services were provided to potential income qualified patrons.
- Multi-touch Marketing
  - SCE targeted unique ZIP codes where direct mail was sent to eligible households.
  - As part of the digital and social mass-media plan, Digital Banner and Social Media ads are used for their geo-targeting capabilities to reinforce CARE messaging to eligible customers during key periods.
- Disaster Support Coordination
  - With the destructive French, Windy, and KNP fires in Southern California, SCE printed over 200 notices that were included in CARE/FERA direct mailers for impacted zip codes.

CARE Program - 2021 Highlights

Program Stats

- Customers Enrolled: 317,504
- Enrollment Rate: 108%
- Electric and Gas Average Bill Discount: $46.76 for Electric and $7.30 for Gas
- Total Annual Electric and Gas Subsidy: $174,824,860

Noteworthy Activities

- 92% customer satisfaction rate
- Continued to stay above CPUC ordered enrollment goal of 90%
- Almost half (47%) of CARE customers received Home Energy Reports
- Transitioned fulfillment services in-house gaining efficiencies and cost savings

CARE Program – Lessons Learned

- 16% of CARE survey participants enrolled in CARE as a result of COVID-19 – especially in the younger population.
- Email remains the most preferred method of communication for receiving information about CARE.
- Online is the most-frequently cited source for completing the CARE application.
- Additional forms of communication such as SMS/text messaging is needed to maintain engagement with customers.

ME&O Highlights

Digital Success

Increased awareness and drove online submissions by using paid search, display ads, and pre-roll video ads garnering more than 32 million impressions and 244,000 clicks.

Targeted Multicultural Marketing

Targeted Hispanic, African American, Chinese, Vietnamese and Filipino audiences using a variety of mass media tactics with over 14 million impressions.

Tribal Partnerships

Increased engagement efforts with 17 federally recognized tribes to provide education and enrollment support.

Increased Web Traffic

Web traffic increased 27% in 2021 with more than 843k visits.

Expanded AFN Reach

Enhanced focus adding more than 20 CBOs with reach to customers with AFN and/or specific disability.

Energy Solutions Partner (ESP) Network

Held more than 2,600 activities including ~250 presentations and events focused on program education and awareness.

ME&O Looking Forward

ESA Measure Specific Campaigns

Target current and eligible customers with measure-specific ESA emails, mailers and digital ads.

Increase Pixel Tracking

Increase pixel tracking on digital ad, emails and website to better target and retarget eligible customers.

FERA Campaign

Dedicated FERA campaign targeted at increasing program enrollments through select CBOs and targeted marketing efforts.

CARE Capitation Partners

Expansion of Capitation Partners to support CARE and FERA program enrollments.

Strategic AFN Engagement

Continued focus on enhancing current partnerships while bringing on new CBOs to reach key customer segments including veterans, seniors and disabled populations.

2021 CARE Results

Key Stats

- Expenditures: $188,829,758
  - 127% of budget
- New enrollments: 270,515
- Enrollment rate: 106%
- Ave. monthly discount: $8.08

Noteworthy Activities

- Top CARE enrollment channels
  - New enrollments via live CSR: 102,604
  - New enrollments via website or MyAccount: 13,220
  - New enrollments via data exchange
    - SCE: 42,726 enrollments; 185,236 recertifications
    - SDG&E: 297 enrollments
    - Water utilities: 1,523 enrollments
  - New enrollments via third-party canvassers: 11,117
- Updated CARE Probability/Propensity Model in August 2021
- Executed agreements (MOUs) with 35 CBOs and FBOs; participated in 1,900+ outreach events to promote SoCalGas Customer Assistance Programs

2021 CARE Results

Key Changes Implemented After June 2021 Decision
• SoCalGas extended CARE enrollment for one additional year to 937,062 customers who were due to recertify during the COVID protection period (March 2020 – June 2021). This ensured a smooth transition in resumption of CARE recertification on July 1.
• SoCalGas updated its CARE eligibility probability model in August 2021. The corresponding coefficients for 21 independent variables were updated using a compilation of 2019 CARE customer data. This doubled the accuracy from the 2012 version of the model.
• SoCalGas implemented a four-year recertification process for the CARE Expansion Program. Expanded CARE facilities were not required to recertify in 2021.
• Quarterly data exchanges were completed with participating water utilities in SoCalGas territory.

2021 CARE Lessons Learned

Web enrollments and MyAccount continue to be the most cost-effective enrollment methods.

Live CSR enrollments, currently limited to phone calls during turn-on services and payment extensions, continue to be the highest method of CARE enrollments (over 102,000 enrollments in 2021).

A test-and-learn approach has been adopted for the CARE Probability Model to continuously monitor and review the model score thresholds ensuring that SoCalGas meets its goal of retaining the most eligible CARE customers.

CARE Program

Questions and Discussion

FERA Program

Presentation order:

SCE
SDG&E
PG&E
Questions and Discussion: All

SCE FERA Program | 2021 Highlights

Program Performance

- 14% Penetration
- Avg. monthly bill savings of $34.43 per household
- Annual subsidy of $12.7M

Implementations for 2021

- Text Message Campaign targeting 500K customers directing customers to sce.com/billhelp
- SCE attended over 15 webinars to promote program offerings

Accomplishments

FERA Targeting

Nearly 1 million direct mailers were sent to customers who, based on advanced customer data analysis, have a higher likelihood to be eligible for FERA

FERA Messaging

Each mailer included a letter showing the FERA income qualifications, a self-addressed, postage-paid return envelope, and an application that was pre-filled with the customer's information to make applying for FERA easier.

FERA Digital

Approximately 850,000 emails were deployed to customers with a higher probability of being FERA eligible. The email featured program information and directed interested customers to SCE.com to enroll.

FERA Rate Comparison

SCE used a rate-comparison direct-mail campaign targeting FERA-eligible customers, comparing their annual electric bill with and without the FERA discount.

SCE FERA Program | Lessons Learned

- Lessons Learned from CARE also apply to FERA
  - Digital CBO/FBO Support
  - Foodservice Partnership
  - Multi-touch Marketing
  - Disaster Support Coordination
- Offering CARE and FERA on one enrollment form does not allow for separate and distinct marketing of each program to the intended target audiences.
  - SCE developed FERA specific communications to highlight the program distinctly from CARE
  - Application enrollment results still favored CARE
- Customers who income qualify for FERA but who participate in a categorically eligible program automatically qualifies for CARE.

FERA Program - 2021 Highlights

Program Stats

- Customers Enrolled:11,206
- Enrollment Rate: 28%
- Electric Average Bill Discount: $30.06
- Total Annual Electric Subsidy: $4,042,215

Noteworthy Activities

- Commission authorized program budget, allowing for the company's launch of first FERA-specific campaign
- Transitioned fulfillment services in-house gaining efficiencies and cost savings

FERA Program – Lessons Learned

- Maintained high enrollment rate with ME&O efforts launching in Q4
- Implemented FERA-specific propensity model to target eligible customers
- Newly authorized ME&O budget will allow for greater customer reach and gain enrollments to meet enrollment goals

PG&E FERA Program – 2021 Highlights

Stats

- 24% - 26% Enrollment ***(vs goal of 30%)***
- 35,592 – 40,904 total enrollments,
- $14,681,075 annual subsidy; ~27% increase YOY from 2020
- Average monthly bill discount:
  - $31.72 electric
- **ME&O Spend: $2,262,717, for the enrollment of 12,376 customers (~$183 per enrolled customer)**

Noteworthy Activities/Outcomes

Expansion of CBO Partnerships

- Included FERA in CBO RFPs to market program with new grants in 2022; awarded 10+ new CBOs contracts

New Messaging

- Continued FERA message testing aimed at overcoming potential enrollment barriers

Key Changes Implemented after June 2021 Decision

- Began implementing a flag in PG&E's customer database to indicate who is likely to qualify; Customer Service Reps can utilize the info
- Explored new ME&O strategies given increasing awareness that 30% enrollment goal for 2021; 40% goal for 2022 are unlikely to be met

Updated Propensity Models / Enrollments

- Updated FERA propensity model achieved a 10% lift in response rates in top decile compared to prior model version.
- Targeting and enrollment remains a challenge - 84% of total enrollments from FERA targeted campaigns ended up being CARE enrollments

Recertification Enhancements

- Relaunched Recertification campaign with additional touchpoints to mirror CARE, plus text/SMS reminders

PG&E FERA Program: Lessons Learned from 2021 Applicable to 2022

Analyze costs and outcomes from ratepayer perspective

FERA ME&O spend in 2021 of $2.2M, (or $183 per enrollment; compared to $29 per CARE enrollment); spending more on marketing FERA is not producing desired results

New strategies to increase enrollment

New strategies in 2022 in response to enrollment goals, include:

- Co-marketing with EV programs with similar income guidelines
- Seeking input from multiple CBO advisory bodies; executing CBO pilot for paid ME&O services
- Increasing outreach to college students and farmworkers

- **Yet - PG&E is unlikely to meet 2022 goal and is in the process of proactively escalating this issue and plans to seek input from key stakeholders (ex. ED, LIOB, others)**

FERA experiences attrition due to recertification and the re-introduction of PEV

Enrollment in 2022 is expected to decline over 2021 due to recertification and the introduction of FERA PEV

FERA-focused marketing efforts only drive minor incremental enrollment

Expect continued challenge to meeting enrollment target, due to structural issues within the program (e.g., small eligible pool, presentment of CARE/FERA together)

FERA Program

Questions and Discussion

ESA Main Program

Presentation Order:

SDG&E
SoCalGas
PG&E
SCE
Questions and Discussion: All

ESA Program Highlights

Enrollment

- Homes Treated: 13,304 and 111% of goal

Energy Savings

- Energy Savings: 1,673,163 kWh 42,890 Therms

Homes Treated

- Total Expenditure: $15,837,309 and 58% of Budget

Enrollment Strategies

- Continued use of virtual enrollment process implemented as part of COVID response efforts
- Targeted outreach for areas eligible for self-certification
- Continued use of PRIZM codes to target customer enrollment
- Leveraging CARE enrollments as program leads
- Targeted marketing, outreach and canvassing campaigns

Key Changes Implemented after June 2021 Decision

- Changed Property Owner Authorization effective date to 24-months
- Completed compliance filings for Pilot Plus and Pilot Deep and measure packages
- Began development of all ESA Program solicitation packages

ESA Lessons Learned in 2021 for 2022 and Beyond

Program Enrollment

- Targeted door-to-door canvassing are a key part of ESA Program enrollment and will continue beyond 2021

Energy Savings

- Targeting homes with potential for energy savings will be critical as measure savings values continue to be reduced

Program Leveraging

- Leveraging CARE program enrollment campaigns continue to drive program participation

Disability Enrollments

- Leveraging new AFN data within SDG&E's systems will improve targeting and reporting efforts in 2022 for customers with disabilities

2021 ESA Program Main Results

Key Stats

- Expenditures: $112,910,354
  - 84% of budget
- Homes Treated: 131,745
  - 110% of goal
  - Highest since 2011
  - 66,406 first time treatments
- Therms Saved: 920,685
- Clear Plan Outreach
  - 309,565 direct mail letters
  - 455,524 emails
  - 273,724 text messages

Noteworthy Activities

- Implemented and executed Post Pandemic Return to Service (PPRS) mechanism
  - 31 contractors received advance payments
  - 22 contractors qualified to offset some advance payments with PPRS credits
  - 7 contractors repaid at least 90% of advance payments using PPRS credits
  - Of these, 3 contractors repaid entire advance payments with PPRS credits
- Throughout pandemic, maintained "excellent" or "very good" customer satisfaction/program delivery scores
  - 74% for overall quality of service
  - 84% for sign-up experience
  - 81% for quality of installation experience
  - 84% for quality of inspection

2021 ESA Program Main Results

Key Changes Implemented After June 2021 Decision

- Concluded Clear Plan activities but continued marketing and communication efforts to increase program awareness and reduce barriers that prevent customers from participating, such as trust and lack of program recognition.
  - Capped the three-year Clear Plan effort that produced nearly 1.3 million customers assigned to contractors as leads to either enroll, educate and provide installation measures and services, or to record customer unwillingness.
- Transitioned to targeting current CARE customers who had not been recently treated by the program in the areas with lowest program enrollment via direct mail letters, emails and text messages.
  - Sent approximately 100,000 direct mail letters, 100,000 emails, and 100,000 text messages during the second half of 2021 to these eligible CARE customers.

2021 ESA Program Main Lessons Learned

Its important to maintain a transparent and open line of communication with ESA contractors – especially during program transitions.

Mid-year cycle program start-ups create challenges with contracts and reporting. To ensure a smooth transition between program cycles, it would be helpful to avoid starting a program cycle mid-year.

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PG&E ESA Program – 2021 Highlights

Stats

- 103,169 homes treated
  - 103% of original goal
- Average lifetime bill savings per participant of $970

Noteworthy Activities/Outcomes

Expansion of CBO and Tribal Partnerships

- Engaged CBOs via paid grants in 2021 to include ESA in marketing related to support for customers with arrearages, and will continue CBO investment by including ESA in expanded CBO outreach initiatives in 2022
- Partnered with 4 new tribal entities, with 52 tribal homes treated in these communities

Load Disaggregation Reports

- ESA customized Load disaggregation reports made available to 1.3M customers

Key Changes Implemented after June 2021 Decision

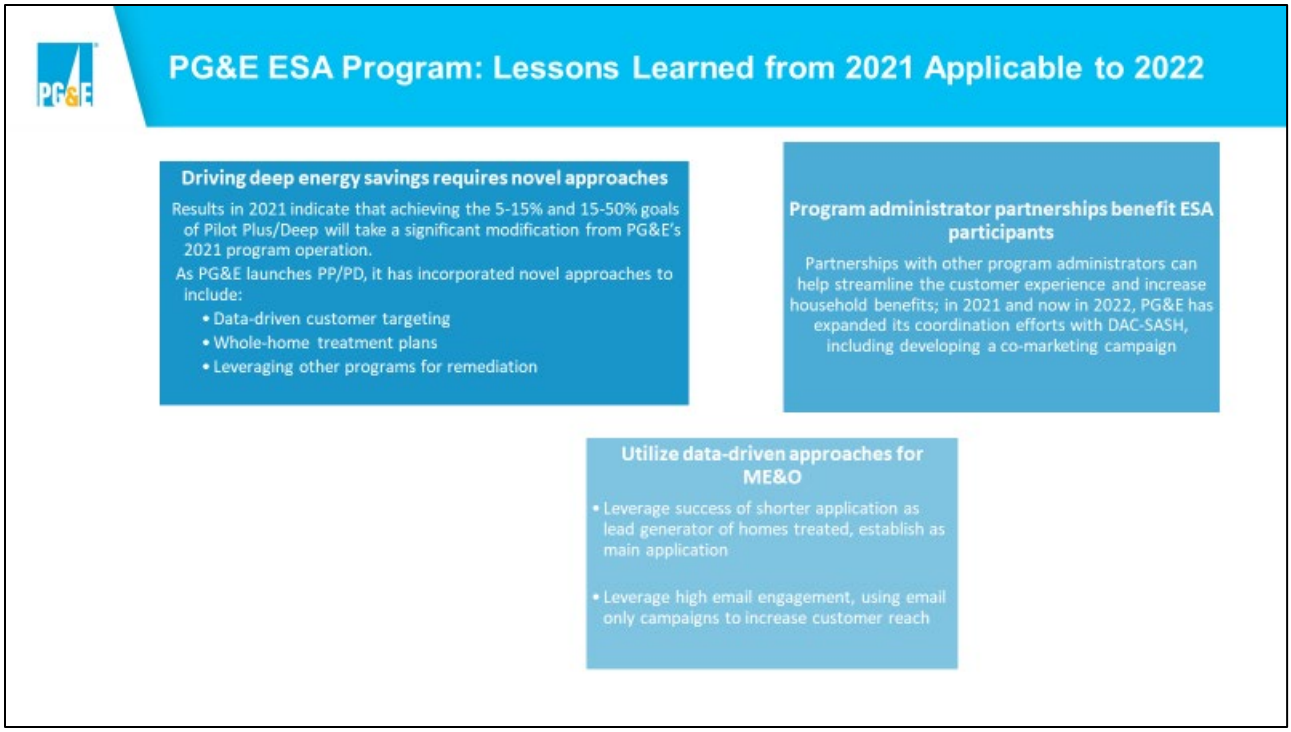
- Competitive solicitations launched for all ESA programs
- Formulation of strategy to meet new reporting requirements, including proving career pathways to disadvantaged workers and tracking participation from different customer segments as well as leveraging efforts
- Begin planning for focused customer-targeting strategy on high energy saving measures

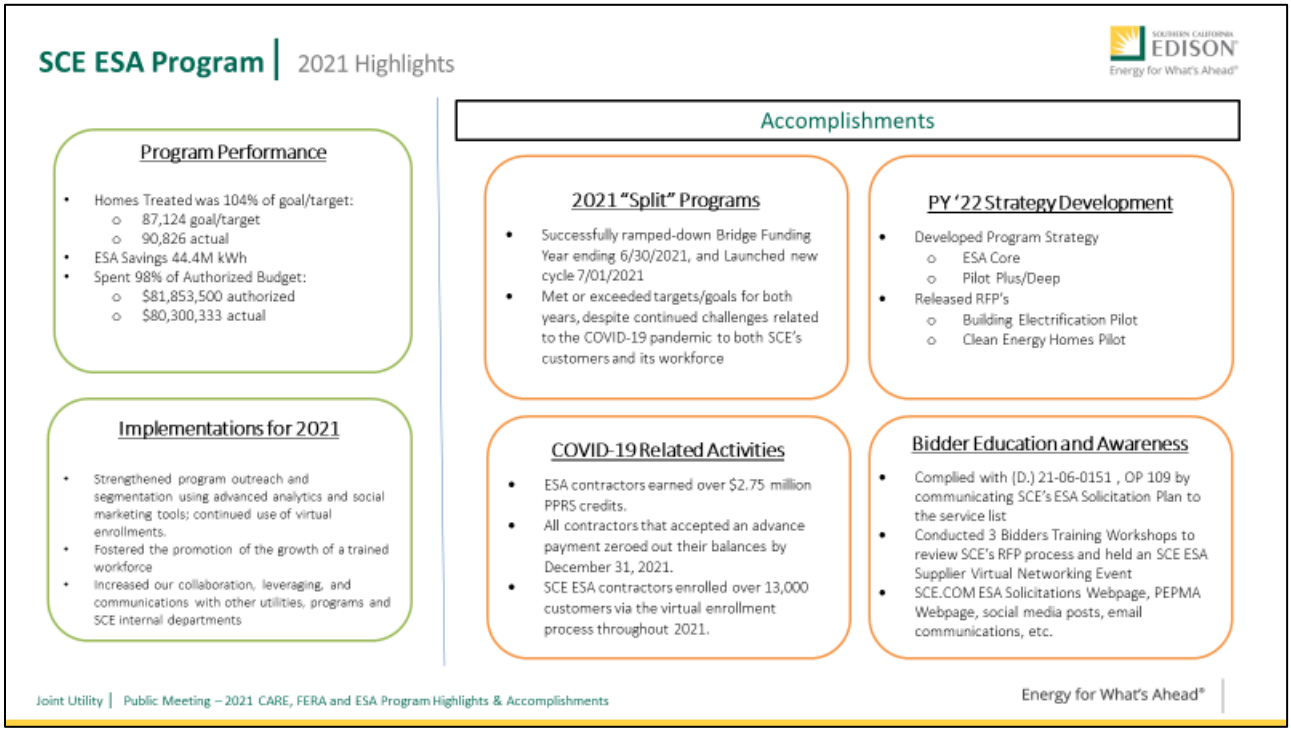
Workforce Education and Training

- Approximately 80% of ESA contractor training participants and ~50% of EE WE&T Technical Upskill training participants meet definition of "disadvantaged worker"

Marketing Education & Outreach

- 25% increase in homes treated directly attributed to shorter application submissions
- Longer digital advertisement on Fresh EBT app led to more than 2x application submissions over previous year
- Increase in valid email addresses submitted via the shorter application


PG&E ESA Program: Lessons Learned from 2021 Applicable to 2022
Driving deep energy savings requires novel approaches
Results in 2021 indicate that achieving the 5-15% and 15-50% goals of Pilot Plus/Deep will take a significant modification from PG&E's 2021 program operation.
As PG&E launches PP/PD, it has incorporated novel approaches to include:
• Data-driven customer targeting
• Whole-home treatment plans
• Leveraging other programs for remediation
Program administrator partnerships benefit ESA participants
Partnerships with other program administrators can help streamline the customer experience and increase household benefits; in 2021 and now in 2022, PG&E has expanded its coordination efforts with DAC-SASH, including developing a co-marketing campaign
Utilize data-driven approaches for ME&O
• Leverage success of shorter application as lead generator of homes treated, establish as main application
• Leverage high email engagement, using email only campaigns to increase customer reach


SCE ESA Program | 2021 Highlights
EDISON
Energy for What's Ahead®
Program Performance
• Homes Treated was 104% of goal/target:
o 87,124 goal/target
o 90,826 actual
• ESA Savings 44.4M kWh
• Spent 98% of Authorized Budget:
o $81,853,500 authorized
o $80,300,333 actual
Implementations for 2021
• Strengthened program outreach and segmentation using advanced analytics and social marketing tools; continued use of virtual enrollments.
• Fostered the promotion of the growth of a trained workforce
• Increased our collaboration, leveraging, and communications with other utilities, programs and SCE internal departments
Accomplishments
2021 "Split" Programs
• Successfully ramped-down Bridge Funding Year ending 6/30/2021, and Launched new cycle 7/01/2021
• Met or exceeded targets/goals for both years, despite continued challenges related to the COVID-19 pandemic to both SCE's customers and its workforce
PY '22 Strategy Development
• Developed Program Strategy
o ESA Core
o Pilot Plus/Deep
• Released RFP's
o Building Electrification Pilot
o Clean Energy Homes Pilot
COVID-19 Related Activities
• ESA contractors earned over $2.75 million PPRS credits.
• All contractors that accepted an advance payment zeroed out their balances by December 31, 2021.
• SCE ESA contractors enrolled over 13,000 customers via the virtual enrollment process throughout 2021.
Bidder Education and Awareness
• Complied with (D.) 21-06-0151 , OP 109 by communicating SCE's ESA Solicitation Plan to the service list
• Conducted 3 Bidders Training Workshops to review SCE's RFP process and held an SCE ESA Supplier Virtual Networking Event
• SCE.COM ESA Solicitations Webpage, PEPMA Webpage, social media posts, email communications, etc.
Joint Utility | Public Meeting – 2021 CARE, FERA and ESA Program Highlights & Accomplishments
Energy for What's Ahead®

SCE ESA Program | Lessons Learned

- Dual campaigns (1st-half 2021 versus 2nd-half 2021)
  - Aggressive marketing campaigns to drive new enrollments and retreatments created challenges to contractors and existing resources
- Tribal Outreach
  - Identify additional opportunities at reservations treated in previous program years (new measures, new residents)
  - Coordinate efforts with tribal liaison within SCE's Public Affairs to better leverage contacts and outreach events
- Improve communications with contractors, increasing transparency throughout implementation of new processes
- Ramp-down activities
  - Define strategies and coordinate implementation plan(s) further in advance to allow additional time for communication to Service Providers and Vendors
- Need to improve reaching hard to reach customers
  - Deaf and hard of hearing
    - Partnership with SIGNIFICANT didn't work as well as expected – looking for new approaches with SCE's AFN team(s)
  - Non-English-Speaking Customers
    - Language translation services has been performing exceptionally well
- Continue Virtual Enrollment as C-19 related issues are still present, find better ways to facilitate the process

ESA Main Program

Questions and Discussion

ESA CAM Program

Presentation Order:
SoCalGas
PG&E
SCE
SDG&E
Questions and Discussion: All

2021 ESA MF CAM Results

Key Stats

- MF Properties Treated: 17
- MF Buildings Impacted: 99
- MF Tenant Units: 1,386
- Boilers Installed: 40

Noteworthy Activities

- Relationship Management via the Single Point of Contact (SPOC) was a key to SoCalGas' success in providing a steady "pipeline" of projects that participated in CAM and allowed integration with various energy efficiency program such as the Energy Efficiency Whole Building program and Multifamily Energy Efficiency Rebates (MFEER) program.
- Governor Newsom's "Project Homekey" initiative helped boost CAM participation, allowing MF property owners to convert existing motels into dwellings for the homeless.

2021 ESA MF CAM Results

Key Changes Implemented After June 2021 Decision

- MF CAM was made available to non-deed-restricted properties at a 50% co-pay.
- SoCalGas implemented Solar Thermal water heating as a new component into MF CAM. It is expected that the first project will be in 2022.

MF CAM 2021 Spending

- 2021 spending was below authorized budget:
  - Property owners were more reluctant to participate in ESA CAM due to the pandemic.
  - Supply chain issues, limited resources (e.g., permitting departments) and COVID-19 restrictions hampered participation and caused delays with existing projects.
- In 2022 ESA CAM will have increased program participation; however, spending is still expected to be below budget due to ongoing effects from 2021.

2021 ESA MF CAM Lessons Learned

COVID-19 concerns limited participation of MF in-unit installations; however, common area measures were more accessible and property owners were more willing to participate in MF CAM due to the limited contact with tenants and on-site staff.

Boiler projects continue to require a level of customization due to the highly complex and technical nature of the projects.

Project timelines can be challenged due to unforeseen conditions such as COVID.

PG&E ESA CAM Program – 2021 Highlights

Stats

- 144 properties and 1,101 buildings treated
- 6.9M kWh, 113 kW, and 50k Therms in savings
- 300 buildings enrolled and 298 buildings audited for PY 2022

Noteworthy Activities/Outcomes

Construction Timeline

- Modified construction timeline to account for unprecedented supply chain issues in 2021

Bid Review Process

- Improved bid review process, accounting for geographic installation cost differences across northern CA's urban and rural regions

Key Changes Implemented after June 2021 Decision

- The ESA MF CAM program continued to wind-down given the Decision approved MFWB for 2022.
- Utilize authorized 2022 program budget to continue serving MF customers under MF CAM in 2022
- Actively maintain a project waitlist for transition to MFWB in 2023

Phased Payments

- Implemented phased payments for large project (over $100k cost) and those with permitting delays

Budget Underspend Drivers

- COVID impacted project delays
- Long life cycle of CAM projects, it takes on average 9-12 months for a project to complete treatment

PG&E ESA CAM Program: Lessons Learned from 2021 Applicable to 2022

Flexible approaches are needed to response to real-world/real-time challenges

2022: MFWB will be developed with this experience in mind, and ability to remain flexible (whenever possible) to changing landscapes

Streamlined data collection is crucial for accurate NMEC evaluation:

2022: MFWB will establish a better process to capture all owner and tenant meters on site and identify the meters associated with each measure

Cross-program coordination (i.e., program layering) is most effective when programs are aligned on eligibility criteria and enrollment documentation.

2022: MFWB will leverage insight into the statewide multifamily market to inform the multifamily decision-tree that will guide interactions with customers and facilitate referrals

ESA CAM & ESA In-Unit upgrades are completed at higher rates when planned concurrently

2022: (1) Introduce single intake application process. (2) Establish full-service whole-building program with multiple program pathways designed for ranging participants & project complexity.

SCE ESA MF CAM Program | 2021 Highlights

Program Performance

- Completed 43 MF CAM Projects
  - 9 Fully Master-Metered properties

Savings

- 1.9M kWh of ESA Total 44.4M kWh directly attributed to CAM related activities

Accomplishments

Driving for Results

- Utilized SPOC to augment outreach performed by Service Providers
- Expanded CAM Service Providers to 7 in total to better service customer needs

Outreach & Marketing

- Secured authorization(s) to treat properties owned by local Housing Authorities, Low-Income Senior Communities in addition to housing for Disabled Adults

Innovative Solutions

- Work with Service Providers and Property Owners to develop new opportunities
  - Added new measures LED Parking lot lamps

Leveraging

- Solar on Multifamily Affordable Housing (SOMAH)
  - 1 project
    - 8 in-units served thru ESA Core

SCE ESA MF CAM Program | Lessons Learned

- Duplication of Efforts
  - Improve coordination amongst CAM Service Providers in shared territory to avoid duplicate outreach efforts amongst eligible properties.
- Process Improvement – New Measures/Offerings
  - Streamline process for evaluation and approval of potential new measures for the common areas
    - Parking Lot Lights; not a standard for ESA Core, so required extra time and research to determine savings potential
  - Develop partnerships with other utilities and water agencies to provide more comprehensive catalog of measures/offerings
- Increased Program Awareness and Opportunities
  - Lead and launch aggressive marketing campaigns, relying less on outreach by Service Provider staff.
  - Sce.com – Update to drive property owners to appropriate information about the CAM Initiative
    - *(Completed) Will be part of the MCP project*
- Better Re-evaluation of Program Implementation
  - Re-evaluate the number of necessary Service Providers based on the level of interest by property owners

ESA MF CAM Initiative - 2021 Highlights

Program Summary	2021 Authorized / Forecasted	2021 Actual	%
• Budget	$5,544,035	$1,282,509	23%
• Properties Treated	38	22	58%
• Multifamily Tenant Units within Properties Treated	N/A	1,676	N/A
• kWh Saved	N/A	355,687	N/A
• kW Demand Reduced	N/A	74	N/A
• Therms Saved	N/A	20,560	N/A

Program Leveraging

- 89 Leads from ESA CAM to SOMAH
- 28 Leads from SOMAH to ESA & ESA CAM

ESA Multifamily CAM Lessons Learned in 2021 for 2022 and Beyond

Lessons Learned

- COVID-19 concerns limited participation and slowed down the document collection process.
- Virtual Touch Points facilitated in moving projects along.
- Project timelines can be challenged due to supply chain issues, especially on HVAC and large energy efficient boilers.

Key Changes Implemented After June 2021 Decision

- Updated Multifamily definition to include properties with five or more units with at least two attached units and targeted properties that had previously been ineligible for the Program.

ESA CAM Program

Questions and Discussion