

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

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

And Related Matters.

Application 19-11-003

Application 19-11-004

Application 19-11-005

Application 19-11-006

Application 19-11-007

**MONTHLY REPORT OF SOUTHERN CALIFORNIA EDISON COMPANY (U 338-E)
ON LOW INCOME ASSISTANCE PROGRAMS FOR AUGUST 2024**

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Dated: September 20, 2024

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ON LOW INCOME ASSISTANCE PROGRAMS FOR AUGUST 2024**

Pursuant to Decision (D.) 21-06-015, Southern California Edison Company (SCE) hereby submits the attached monthly status report on its Energy Savings Assistance (ESA), California Alternate 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 (CPUC's) Energy Division (ED) with information to assist in analyzing these low-income programs.

This report presents year-to-date ESA, CARE, and FERA program results and expenditures through August 31, 2024.

Respectfully submitted,

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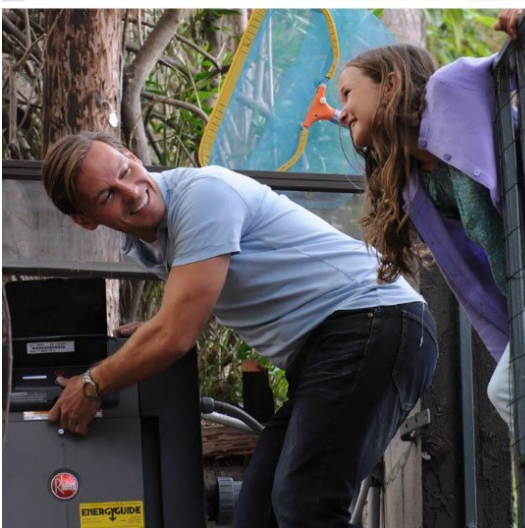
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Attachment A

ESA, CARE, and FERA Programs Report

August 2024



Southern California Edison

August 2024 Monthly Report for

Energy Savings Assistance (ESA), California Alternate Rates for Energy (CARE), and Family Electric Rate Assistance (FERA) Programs

September 20, 2024



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

August 2024 Report

Southern California Edison Company (SCE) provides numerous opportunities for customers to reduce their energy bills, become more energy efficient, and receive payment arrangements or assistance in tough times. Three of these programs—all focused on helping income-qualified residents—are covered in this monthly report: Energy Savings Assistance (ESA), California Alternate Rates for Energy (CARE), and Family Electric Rate Assistance (FERA).¹ These programs directly benefit low-income customers by reducing their energy bills, increasing the comfort and safety of their homes, and promoting energy education and efficiency practices that lead to resource adequacy, and a lower carbon footprint. Budgets and goals for these programs from July 1, 2021, through December 31, 2026, were authorized in Decision (D.) 21-06-015, which provides the foundational numbers for this report. All program accomplishments and expenditures herein relate to calendar year 2024 up to and including August 31, 2024.

1. ENERGY SAVINGS ASSISTANCE (ESA) EXECUTIVE SUMMARY

1.1 ESA Program Summary

The objective of SCE’s Energy Savings Assistance (ESA) program is to help income-qualified customers reduce their energy consumption and costs while increasing their health, comfort, and safety at no cost to them. Through the ESA program, SCE offers several energy-efficient appliances to income-qualified customers, including energy-efficient refrigerators, air conditioners, and home-efficiency solutions like weatherization that can help customers save energy and money. SCE currently has five projects in its ESA program: ESA Main, which is available to income-qualified

¹ SCE has provided monthly reports for CARE and LIEE (now ESA) since 2001. *See* D.01-03-028, Ordering Paragraph (OP) 12. SCE began including monthly FERA metrics beginning in 2022. *See* D.21-06-015 at 435.

customers living in single-family or mobile homes; Southern Multifamily Whole Building (MFWB) program, which is available in multifamily dwellings; ESA Whole Home, for high energy users; ESA Building Electrification (BE) pilot; and ESA Clean Energy Homes (CEH) pilot. To be eligible for the program, customers may be homeowners or renters and must meet the program's income guidelines, which are established by the California Public Utilities Commission (CPUC or Commission) and updated annually. Specific measures are authorized according to criteria observed in each home for existing appliances and feasibility of installation.

The ESA Main program shifted focus from a household treatment model to a deeper energy savings model prioritizing enrolling customers with higher energy usage. The following program-wide changes were implemented in 2023 and will continue in program year 2024 for ESA Main:

1. *Tiered Offering – Basic and Basic Plus.* Whether a customer qualifies for Basic vs. Basic Plus offering is based on their average energy use. Those who qualify for Basic Plus are considered high-energy-use customers, or 200% above normal baseline levels. Basic customers (below 200% baseline electricity usage) would be eligible for Light-Emitting Diodes (LEDs) lighting, smart power strips, refrigerators, smart communicating thermostats, clothes washers, dishwashers, freezers, pool pumps, evaporative coolers, weatherization services, heat pump water heaters, non-heat pump heating, ventilation, and air conditioning (HVAC) systems and heat pump HVAC systems. Basic Plus includes all the Basic offerings as well as additional heating/cooling measures (e.g., Portable Air Conditioners and Room Air Conditioners). These are more complicated and expensive to install and typically less cost-effective, but necessary to obtain deeper energy savings in high usage homes.
2. *Fuel Substitution measures are also being offered.* SCE is offering highly efficient Heat Pump HVAC systems and Heat Pump Water Heaters to replace gas and propane fueled systems where feasible. The ESA program along with the SCE-approved contractors are trying to educate SCE customers on the benefits of electrification through these new program offerings.

**For a detailed breakdown of ESA program expenses,
see ESA Expenses Summary Table in Appendix A.**

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

ESA Main (SF, MH) Program Summary Expenses for 2024			
	2024 Authorized / Planning Assumptions²	Actual to Date³	%
Budget ⁴	\$ 59,458,992	\$ 31,639,294	53%
Homes Treated	64,922	26,319	41%
kWh Saved ⁵	31,762,240	12,822,559	40%
kW Demand Reduced ⁵	12,681	2,416	19%
Therms Saved ⁵	383,213	TBD	TBD
GHG Emissions Reduced (Tons)	N/A	N/A	N/A

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

² Authorized ESA budget, energy savings goals and household treatment target per D.21-06-015.

³ As shown in ESA Monthly Report Table 1 and Table 2.

⁴ ESA Main program budget includes measures and program administrative budget categories as shown on ESA Monthly Report Table 1.

⁵ Per Table 5 of Attachment 1, D.21-06-015, the 2024 goals for kWh, kW, and therms include ESA Main and MFWB; however, the above table reports result only from ESA Main, and does not include results from MFWB.

There are three stages in the ESA Main program. Each stage is delivered by an SCE-approved contractor. First, the enrollment and assessment stage occur when an ESA contractor confirms the customer's income eligibility and does a walk-through of the home to collect information to help SCE determine the potential for installation of one or more appliances or services. Second, the installation stage occurs when the appliances are delivered, replaced, and installed. Third, the final stage occurs when an inspection is performed in the home to verify that the contractor has completed the work to meet quality standards. If the work is not done properly, it will be redone at no cost to the customer. Participation in the ESA Main program began January 1, 2023.

As of August 31, 2024, SCE has spent 53% of the ESA Main program budget for 2024. This includes both measures and program administrative budget categories.

The SCE team is continuing to (a) work closely with the ESA contractors through the challenges faced during the ramp-up process, and (b) collaborate on program plans intended to improve performance. In August 2024, SCE continued to evaluate the effectiveness of the operational changes made to the program thus far. Strategies—such as (1) lowering the high-usage threshold to allow more customers to be eligible for additional measures, (2) including more measures to ESA participants who were not deemed high usage, (3) reinstating joint enrollments with Southern California Gas Company (SoCalGas), and (4) authorizing contractors to identify and enroll customers through their own outreach methods—improved performance in the later part of 2023. SCE will continue implementing these strategies in 2024 to meet annual and program cycle energy savings and homes treated goals.

The decrease in the monthly number of homes treated in August compared to July can be attributed to several factors. First, as SCE transitions its enrollment and installation activity to its new database, changes in the reporting cadence have impacted the number of homes reported. Second, inventory delays for certain measures have pushed out some installations. Third, some contractors are focusing on completing their robust installation queues and have slowed down on

enrolling new customers, as they need to provide measures to those already enrolled. These combined factors have temporarily impacted the numbers on our monthly reports but does not mean that contractors have slowed down. SCE and its contractors are still serving customers and providing services.

CPUC Letter – SCE’s ESA Program Performance During 2023

On September 8, 2023, SCE received a letter from Leuwam Tesfai, Deputy Executive Director for Energy and Climate Policy / Director, Energy Division, regarding SCE’s ESA program and its performance for the program year 2023. The letter expressed three main concerns: (1) the low number of homes treated in SCE’s ESA program in 2023 thus far, (2) the resulting inability of income-qualified homes to receive upgrades, savings, and non-energy benefits from the program, and (3) the potential for SCE to meet its annual and program cycle energy savings goals overall.

To discuss this letter, SCE met with the Energy Division (ED) staff on September 18, 2023. SCE and the ED agreed upon SCE’s proposed mitigation plans, reporting needs, and due dates. As part of SCE’s efforts to remediate its ESA program shortfalls and improve performance moving forward, the ED requested that SCE submit both weekly and monthly reports consisting of estimated program performance metrics and progress toward mitigation actions to the service list for Application (A) 19-11-003. Beginning September 2023, SCE has submitted both updates—weekly directly to ED and monthly to the service list as directed. Recently, SCE submitted its eleventh monthly report to the service list on August 9, 2024. The report presented year-to-date ESA program results and expenditures for calendar year 2024 up to and including July 31, 2024. Following the submittal of each monthly report, SCE has held meetings with ED to provide updates on program performance and discusses the progress made on various mitigation activities for the prior month. Starting April 26, 2024, these monthly meetings were superseded by weekly meetings because of the April 16, 2024, letter from the Commission’s Executive Director, as described below. Starting in June, the meeting cadence was revised to occur bi-weekly.

CPUC Letter – Request from Stakeholders for Response Regarding ESA Program Challenges

On April 16, 2024, SCE received a letter from Rachel Peterson, Executive Director for the CPUC, sent to the Low-Income Oversight Board’s (LIOB) Chair Benito Delgado-Olson, which cites the request outlined in the LIOB’s March 14, 2024 non-binding motion. The letter requested SCE to (1) provide input on various ongoing initiatives including advance payments to contractors, (2) discuss its plans to meet and confer with representatives of its ESA contractor group to receive input regarding concerns and collaboratively discuss possible solutions, and (3) address the challenges around SCE’s new system implementation. On April 25, 2024, SCE responded to the recommended actions in the letter and described how SCE is actively pursuing solutions in all areas that were identified.

SCE informed the LIOB and the Commission of its decision to offer advance payments to select contractors in a letter sent on April 15, 2024. Following the announcement, SCE sent Letter Agreements with advance payment offers to contractors on April 24, 2024. Payment disbursements to contractors started on May 3, 2024. As of June 3, 2024, SCE has issued advance payments to 14 contractors, which represent all contractors that accepted the terms of the Letter Agreement. Monthly repayments will start in September 2024 and continue through December 2026. SCE is committed to supporting the contractors in their continued efforts to ramp up ESA program operations and serve more customers in the remainder of the program cycle.

Furthermore, SCE has initiated bi-monthly contractor feedback sessions. This is an opportunity for SCE to engage and hear directly from its ESA contractors. These sessions are designed to facilitate constructive dialogue, allowing contractors to share observations, pain points, and feedback. SCE aims to collaborate on solutions for high priority issues raised by its ESA contractors. On August 28, 2024, SCE held its third forum of this kind, discussing program strategy updates, iEnergy enhancements, inspection policies, and marketing plans for the rest of the year. SCE will continue to actively solicit contractor feedback prior to the forums to gather agenda items that contractors would like to discuss.

Since June, the ED changed the weekly meetings to bi-weekly meetings. SCE now meets with the ED bi-weekly to provide updates on advanced payments, ESA enrollments, and SCE’s progress toward cycle goals.

ESA Program Administrative Expenses for 2024		
	Current Month	YTD
Administrative Expenses ⁶	\$ (119,193)	\$ 2,029,289
Total Program Costs	\$ 4,862,931	\$ 31,639,294
% of Administrative Spend	-2%	6%

Administrative expenses are capped at no more than 10% of the program costs starting in program year 2024. As of August 2024, SCE is currently at 6% of the administrative cap. The calculation of the percentage of administrative expenses has been adjusted to be consistent with the Energy Efficiency programs per D. 21-06-015. Costs such as marketing and outreach, evaluation, and training were included in administrative expenses in previous reports but have been removed.

<p><u>For a detailed breakdown of ESA Main metrics, see the following Tables in Appendix A:</u></p> <ul style="list-style-type: none"> • <u>ESA Table 2 – Installations</u> • <u>ESA Table 3A – Energy & Bill Savings</u> • <u>ESA Table 4A – Homes / Buildings Treated</u> • <u>ESA Table 5A – Customer Summary</u>

⁶ The decrease in current month’s Administrative Expenses is due to an update to the July YTD amount to correct for an overstatement.

MFWB (In-Unit, WB) Summary Expenses for 2024			
	2024 Authorized / Planning Assumptions	Actual to Date	%
Budget ⁷	\$ 15,784,061	\$ 946,280	6%
Properties Treated	80	0	0%
Homes Treated (in Unit)	15,359	538	4%
kWh Saved	10,561,043	177,437	2%
kW Demand Reduced	0	4	0%
Therms Saved	0	940	0%
GHG Emissions Reduced (Tons)	NA	NA	0%

The Southern Multifamily Whole Building (MFWB) program is designed to deliver whole-building energy efficiency, electrification, health, and safety upgrades to income-qualified multifamily property owners and residents. Through a whole-building approach, eligible multifamily properties who meet applicable income qualifications and building requirements may receive whole building, common area, and in-unit measures. The Southern MFWB program serves both deed and non-deed restricted multifamily buildings within the territories of SCE, SoCalGas, and San Diego Gas and Electric (SDG&E). The Southern MFWB program is being implemented by Richard Heath & Associates (RHA), a non-utility, third party.

Upon completion of property treatments, the lead utility will conduct inspections prior to payment approval. Only when payments are approved will SCE receive notice of project completion, which may result in reporting delays. In the table above, “Properties Treated” refers to Common Area and Whole Building projects. These projects include the installation of measures within the properties’ common area and or the replacement of appliances that serve the whole building. “Homes Treated” refers to multifamily tenant units. This table also outlines specific budget and planning assumptions unique to SCE and actual figures

⁷ Budget does not include budget and spend allocated to Single Point of Contact (SPOC).

accumulated year-to-date for the Southern MFWB program. SCE contributes 31% of total program funding; however, by the end of August, work performed for SCE's multifamily customers accounted for 18% of total program expenditures.

For a detailed breakdown of ESA Southern MFWB metrics, see the following Tables in

Appendix A:

- **ESA Table 2A – Installations & Expenses**
- **ESA Table 3B – Energy & Bill Savings (In Unit)**
- **ESA Table 3C – Energy & Bill Savings (Building)**
- **ESA Table 4B – Homes / Buildings Treated (In Unit)**
- **ESA Table 4C – Homes / Buildings Treated (Building)**
- **ESA Table 5B – Customer Summary (In Unit)**
- **ESA Table 5C – Customer Summary (Building)**

ESA Whole Home Summary Expenses for 2024			
	2024 Authorized / Planning Assumptions⁸	Actual to Date	%
Budget	\$ 3,884,864	\$ 377,193	10%
Homes Treated	915	18 ⁹	2%
kWh Saved	0	14,971	0
kW Demand Reduced ¹⁰	0	2,035	0
Therms Saved	0	1,235	0
GHG Emissions Reduced (Tons)	N/A	N/A	N/A

In D.21-06-015, the Commission granted approval for a pilot-based redesign concept of the ESA program based on recommendations provided by the ED. The newly designed pilot program, known as ESA Pilot Plus/Deep (PP/D) or ESA Whole Home (ESA WH), is a joint pilot between SCE and SoCalGas. The pilot targets CARE high-usage customers who reside in specific counties within SCE and SoCalGas’s common service areas. In late 2022, Maroma Energy Services (Maroma) was selected as the implementer and Illume was selected to be the evaluator for ESA WH.

ESA WH began in 2023 with enrollment and assessment appointments starting in the fourth week of May. With a few adjustments to marketing collateral and additional email outreach efforts, ESA WH has since doubled its customer interest since the beginning of this year. However, SCE and SoCalGas are still struggling to increase customer installations. Both utilities are looking at ways to improve the installation numbers in 2024 and have begun to implement

⁸ Home treatment, energy savings and GHG emissions reduction targets were not included in D.21-06-015. SCE will report on actual achievements upon completion of home treatment.

⁹ Process from installation to completion is lengthy and therefore takes substantial more time to see projects completed. *See Section 1.2.1*, for projects in the pipeline.

¹⁰ Maroma is currently reviewing kW savings for certain measures. Savings will be updated next month, if needed.

changes to customer segmentation and the frequency with which customer lists are published to the implementor, Maroma.

As of August 31, 2024, there are 532 customers who have expressed interest in the program and enrolled.¹¹ From inception to date, the average cost per treated home is \$14,047.54.

SCE recently discovered that for certain Pilot Deep measures deemed savings were used instead of modeled savings. The pilot implementer, Maroma, will revise the calculated savings for next month's report, which will ensure better comparisons between savings for Pilot Deep and Pilot Plus.

More information regarding ESA Whole Home outreach and enrollment can be found in *Section 1.2.1*.

For a detailed breakdown of ESA Whole Home metrics, see the following Tables in

Appendix A:

- **ESA Table 2B – Installations & Expenses**
- **ESA Table 3D – Energy & Bill Savings (Pilot Plus)**
- **ESA Table 3E – Energy & Bill Savings (Pilot Deep)**
- **ESA Table 4D – Homes / Buildings Treated**
- **ESA Table 5D – Customer Summary**

¹¹ Enrollment numbers will fluctuate from month to month as customers may be deemed ineligible after the energy audit is conducted or if the customer chooses to be removed from the program following the audit.

ESA Building Electrification (BE) Pilot Summary Expenses for 2024			
	2024 Authorized / Planning Assumptions	Actual to Date	%
Budget	\$ 10,252,080	\$1,300,806	13%
Homes Treated ¹²	N/A	64	0
kWh Saved	N/A	(171,667)	0
kW Demand Reduced	N/A	0	0
Therms Saved	N/A	25,237	0
Claimable kWh Saved ¹³	N/A	567,777	0
GHG Emissions Reduced (Tons)	N/A	N/A	N/A

The ESA Building Electrification (BE) pilot is an SCE-only pilot offered to income-qualified customers residing in single family homes located in disadvantaged communities (DACs). The BE pilot primarily focuses on converting space and water heating systems from natural gas or propane to electric heat pumps, aiming to reduce energy costs and greenhouse gas (GHG) emissions. Additionally, a limited number of homes may also receive additional electrification measures, such as induction cooking equipment and energy-efficient clothes dryers.

SCE is continually enhancing customer engagement, streamlining processes, and improving overall experience. The BE pilot has maintained a stable pipeline of projects, from early enrollment phase to installation pending

¹² The Homes Treated number represents the number of projects that had the final verification performed by SCE in 2024.

¹³ The claimable kWh saved was calculated using methodology in Fuel Substitution Technical Guidance Document in accordance with D.19-08-009. Claimable kWh = kWh + (Therms x 29.3). The California Public Utilities Commission, Fuel Substitution Technical Guidance Document v.1; available at <https://www.cpuc.ca.gov/-/media/cpuc-website/divisions/energy-division/documents/building-decarb/fuel-substitution-technical-guide-v11.docx>.

final documentation. Further details regarding BE pilot activities performed in August 2024 and its ongoing advancements are outlined in *Section 1.2.1*, below.

For a detailed breakdown of ESA BE pilot metrics,

see the following Tables in Appendix A:

- **ESA Table 2C – Installations & Expenses**
- **ESA Table 3F – Energy & Bill Savings**
- **ESA Table 5E – Customer Summary**

ESA Clean Energy Homes (CEH) Pilot Summary Expenses for 2024			
	2024 Authorized / Planning Assumptions	Actual to Date	%
Budget	\$ 1,775,000	\$ 411,756	23%
Homes Treated ¹⁴	N/A	N/A	N/A
kWh Saved ¹¹	N/A	N/A	N/A
kW Demand Reduced ¹¹	N/A	N/A	N/A
Therms Saved	N/A	N/A	N/A
GHG Emissions Reduced (Tons)	N/A	N/A	N/A

The ESA Clean Energy Homes (CEH) pilot, an SCE-only pilot, offers incentives for low-income housing developers to incorporate innovative low-carbon technologies and building practices into residential new construction designs that will provide housing with low utility cost to residents. The CEH pilot supports the state’s ambitious GHG reduction goals and strives to bring environmental equity to vulnerable customers. The CEH pilot offers technical design assistance, location-specific GHG-driven financial incentives, and coordinated education and outreach to overcome barriers to affordable all-electric construction. The Association for Energy Affordability (AEA) serves as the CEH pilot implementer (Implementer), collaborating with SCE on marketing activities, website enhancements, and other implementation activities.

D.21-06-015 provided guidance for implementing the CEH pilot program in geographic areas not served by SoCalGas, Pacific Gas and Electric Company (PG&E), SDG&E, and Southwest Gas Corporation, thereby limiting pilot eligible areas to Long Beach, Vernon, Catalina Island, and portions of Mono and Inyo counties. The CEH pilot is also available to properties or buildings that do not

¹⁴ CEH does not track installations or homes treated since it is a new construction program that provides Design Assistance and Tenant Education.

meet the Building Initiative for Low Emissions Development (BUILD) program’s low income/disadvantaged communities’ definition.

Unlike typical widget or appliance installations-based programs, CEH focuses on early design stages of new construction projects and therefore, CEH pilot activity is tracked differently. Projects are tracked in the IQP Monthly Report Tables within the ESA Table 2D Tab, including stages from the submission of an Interest Form (which initiates a follow-up intake call) to formal applications for incentives. These applications can be for direct design assistance, design incentives, or tenant education, depending on the participant’s needs. Project timelines vary, so tracking interest forms, applications, and submitted incentives helps ensure accurate monitoring.

Outreach and education are integral to the CEH pilot, with webinars and active lead tracking emphasized from launch. Despite geographic limitations, which have posed challenges in recruiting and enrolling projects into the pilot, interest in the pilot grew from 12 to 19 total projects as of August 2024. SCE, along with the Implementer, developed a Strategic Action Plan to enhance pilot performance with an increase of seven new projects last month. SCE continues to work with the Implementer to develop solutions to address slow pilot uptake.

There has been general reluctance from builders and developers to engage in incentive programs during the early project phases, highlighting a need for broader education on all-electric design. To address this, the pilot Technical Design team will collaborate with the outreach team to deliver direct presentations to developers on all-electric design practices, aiming to stimulate greater program engagement.

For a detailed breakdown of ESA CEH pilot expenses and installations, see ESA Table 2D in Appendix A.

1.1.2 Program Measure Changes

D.21-06-015 allows the utilities, in consultation with the statewide ESA Working Group (WG), to update the measure mix through the ESA program monthly report.¹⁵

SCE made no such program measure changes to all the programs and pilots in August 2024.

1.2 ESA Program Customer Outreach and Enrollment Update

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

ESA Main (SF, MH) Program Contractor Outreach

SCE's outreach efforts, with the support of its ESA program contractors, include many channels and innovative approaches to inform and enroll customers. The following section describes some of the methods SCE implements to enroll customers and conduct outreach activities that inform customers about the ESA program.

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

SCE continues to provide SCE-generated leads to contractors, including those customers that contact the customer contact center (CCC) as well as those that sign up on the ESA webpage on SCE.com. Each month, SCE may also send out direct mail letters and emails to customers that SCE has determined to have a high probability of enrolling in the ESA program. SCE is also targeting customers for enrollment based on their energy usage. These marketing activities help drive

¹⁵ D.21-06-015 at 486, OP 69.

leads to ESA contractors so they can contact interested customers and enroll them in the ESA program. SCE is collaborating with ESA contractors to better align marketing strategies with each contractor's outreach strategy and specific service area focus. This approach is aimed at targeting geographic areas that have high potential for ESA participation and are aligned with each contractor's outreach activities.

SCE's ESA contractors also perform enrollments for SoCalGas (for those customers able to jointly enroll) thereby increasing the contractors' enrollment potential and creating a better and more streamlined customer experience. ESA contractors also do activities such as canvassing neighborhoods, door knocking, participating in community events, and other activities that reach income-qualified customers. From these efforts, ESA contractors continued to generate Joint Utility leads and Outreach leads. As a result of these outreach efforts, contractors were able to enroll approximately 3,500 customers into the program in August.¹⁶ SCE continues to receive feedback from contractors and is focused on supporting them with these outreach activities.

Southern Multifamily Whole Building (MFWB)

In the month of August, the Southern MFWB implementer, RHA, enrolled 9 new properties, assessed 20 properties, and completed 848 in-unit treatments throughout the service areas of SCE, SoCalGas, and SDG&E. Since the program's launch in July 2023, RHA has enrolled 258 properties, assessed 230 properties, treated 2,841 tenant units, and completed four Common Area projects. To date, RHA has completed 109 property enrollments, 92 property assessments,

¹⁶ Customers that enrolled in the ESA program may not yet be considered a "home treated" until receiving at least one energy saving measure. Customers that enrolled in the ESA program, received Energy Education, and received at least one energy saving measure is referred to as a "home treated."

and 538 units within SCE's territory. However, RHA has not completed any Common Area projects in SCE's territory.

Upon completion of the property assessment, RHA provides a list of approved common area and/or whole building program measures (called an incentive proposal) to the property owner. Once the property owner approves the proposal, installation of measures will commence. To date, the program has received 27 accepted Common Area/Whole Building incentive approvals from participating properties. The current average timeframe for a property lead to progress into a completed Common Area/Whole Building project is 11 months.

By the end of August, RHA reported a pipeline of 1,382 qualified property-level leads and 5,241 tenant-driven leads. SCE customers accounted for over 70% of residential leads. By the end of the month, RHA conducted 5,472 customer interactions via their call center, with most callers identified as SCE customers. In August, RHA attended the AOA (Apartment Owners Association) trade show at the Long Beach Convention Center. Event attendees included rental housing owners and property managers. Throughout August, SCE continued collaborating with RHA on various program-related tasks, including lead referrals, project status, and strategies to maximize customer engagement and program participation.

SCE's single-point-of-contact (SPOC) continued to engage with property owners who express interest and conducted outreach to potential participants. The SPOC shared program information and layering opportunities with interested property owners and facilitated communication between prospective program participants and RHA. By the end of August, SCE provided RHA with 53 property leads, 541 residential leads, 1,048 deed-restricted property level prospects, and 12 SOMAH referrals in 2024. In August, SCE's SPOC also shared lead lists, totaling 175 multifamily property owners, with SCE's Charge Ready program and SOMAH for potential program participation.

ESA Whole Home

Outreach

SCE and SoCalGas have modified the approach to customer segmentation. All eligible customers have been and will continue to be provided to Maroma to solicit customers to participate in the pilot. Both utilities are hopeful this will increase customer interest and participation throughout 2024. Maroma is continuing its outreach efforts to customers identified in Year 1 and 2 for three attempts, which is their contact threshold.

The co-branded marketing materials between Maroma, SCE, and SoCalGas have improved customer response rates, more than doubling since deployment in February 2024. The co-branded marketing materials are set on a 15-day cadence. In July, 1,354 factsheets and 3,382 postcards were sent out.

The email campaign launched in April 2024 has yielded very promising response rates. Through this engagement, customers are providing the best contact information, enabling contractors to assess and schedule “hot” leads. The campaign has helped identify the most viable customers for enrollment. However, in July, the Marketing team decided to temporarily pause the email campaign due to concerns that continuing to send emails to the same list, given the high bounce and low engagement rates, might result in the domain being flagged as spam by multiple providers. The program will resume email marketing with the updated list once customers are assigned to contractors.

Enrollment

There are seven contractors that are actively working leads. To assist contractors with workload, an Energy Auditor model has been designed and implemented to remove the energy audit portion of the enrollment process from the contractors and place it with a third party, allowing contractors to focus on installation and post installation activities. This model was implemented late June 2024.

Enrollment for ESA Whole Home is ongoing, with 532¹⁷ homes enrolled since pilot launch. The current fall-out rate after a customer expresses interest in the program is 19%, a 2 percent decrease from last month.

SCE and SoCalGas continue to look at ways to improve program enrollment. In the past month, both utilities and their third-party evaluator, Illume, met with the ED to propose the following changes to improve lead generation efforts:

- Quarterly refresh of customer target list,
- Implementer to be given entire eligible targeted population (CARE, >300% above baseline for electric, >200% above baseline for gas, and within San Bernardino or Riverside or Los Angeles Counties),
- Allow any targeted customer enrollment into the program regardless of year they were targeted, and
- Lower the “high usage” percentage to 200% above baseline for electricity and 100% above baseline for gas.

SCE and SoCalGas are now working to provide an updated quarterly refreshed list of eligible customers and providing updated information on previously identified eligible customers to Maroma.

ESA Whole Home Progress through August 31, 2024



Project Status	Number of Homes
In Progress (<i>Enrollment phase</i>)	359
Pending Approval (<i>Enrolled, Pending Review and Approval</i>)	0
Enrolled/Installed (<i>Audit, Savings Verified, Treated, Testing, and Permits</i>)	51
Completed (Invoiced)	20
De-Enrolled (<i>Min Savings not met, Refused to Participate, Exceeds Mitigation cap</i>)	102

¹⁷ Enrollment numbers will fluctuate from month to month as a customer may be ineligible following the energy audit or the customer chooses to be removed from the program.

ESA Building Electrification Pilot

In August 2024, the BE pilot implementer continued engaging previous outreach respondents and conducted door-to-door canvassing. SCE supported these efforts by providing printed materials, including flyers, factsheets, and doorhangers. This month's marketing campaign also included a customer letter (*See Sample of BE Pilot Letter*) introducing the BE pilot and outlining the application process.

Sample of BE Pilot Letter




[NAME]
[ADDRESS]
[CITY], [STATE] [ZIP]

Hello SCE Customer,

As a Southern California Edison (SCE) customer, you may be eligible to receive new, high-efficiency electric appliances at **no cost** through the Building Electrification Program. Whether you rent or own, this program will help you replace natural gas or propane appliances with high-efficiency electric equipment. If recommended for your home, and you are an eligible customer, upgrades can include:

- Heat pump heating and AC system
- Heat pump water heater
- Smart thermostat
- And more!

Let us know you're interested by calling 833-367-5497 or submitting an online interest form at sce.com/goelectric.



How it works
SCE has contracted MAROMA Energy Services (MAROMA) to implement the Building Electrification (BE) Program. Once you let us know you are interested, a MAROMA team member will be in touch to review the program with you and schedule a home visit to begin the process. MAROMA and its network of service providers will work with you to manage each step of the project.

Our team will review your eligibility and, if you are eligible, assess your home to identify upgrades that could help you save energy. From there, we will work with you to set up a project plan and schedule work to be done on your home. The BE Program covers the costs for the home assessment, new high-efficiency electric equipment, and installation for recommended upgrades*.

Upgrades made through the BE Program may lower your energy bills and make your home healthier and more comfortable.

The Building Electrification Program is **limited and available on a first-come, first-served basis** to income-eligible households with qualifying homes.

Best regards,
MAROMA Energy Services
Upland, CA
833-367-5497 sce.com/goelectric

* Certain restrictions, such as electric panel capacity, size and condition of the system or appliances to be replaced, may apply.
The Building Electrification Program is funded by California utility ratepayers and administered by Southern California Edison under the auspices of the California Public Utilities Commission. Eligibility requirements apply and Program services are offered on a first-come, first-served basis until funds are no longer available or the Program is discontinued. California consumers are not obligated to purchase any full-fee service or other services not funded by this Program. This Program is available to both homeowners and renters who meet the qualifications. Renters may be required to obtain the property owner's written permission before services are delivered.

Additionally, SCE collaborated with the implementer to develop tracking tags for an upcoming email campaign. These tags will enable SCE to monitor customer behavior on the website for those who open the email and visit www.sce.com/goelectric, helping enhance future campaigns. SCE also promoted

an electrification training (see flyer below) for community-based organizations (CBOs) and contractors, aimed at educating CBOs and program outreach staff on electrification to support clean energy initiatives.

SCE’s Electrification Education for CBO’s and Outreach Professionals Flyer



The flyer features the Southern California Edison logo at the top left with the tagline "Energy for What's Ahead". The main title is "ELECTRIFICATION EDUCATION FOR CBOs AND OUTREACH PROFESSIONALS". Below the title is a photograph of a technician in a blue uniform working on a residential electrical panel. The flyer is divided into several sections: "TRAINING DATES" listing locations and dates from August to October; "All Class Times" indicating 9:00 AM - 12 PM with lunch provided; "Electrification Training Modules" listing topics like "Why Electrification" and "Residential Buildings"; "Learn how to discuss electrification with members of your community:" providing a detailed description of the three-hour training; "EMPOWER YOUR COMMUNITY WITH THE KNOWLEDGE TO SWITCH TO CLEANER, GREENER ENERGY THROUGH ELECTRIFICATION" in a yellow box; "To participate" listing eligibility criteria; and "Ready to Get Started?" with a call to action to fill out a form. Small print at the bottom states that programs are funded by California utility customers and administered by SCE under the auspices of the California Public Utilities Commission.

The implementer added two subcontractors to the network authorized to offer BE pilot services. SCE continues to streamline the documentation submission process to expedite project review and verification. As detailed in Table 1 below, there are over 300 projects in various stages, with 64 homes treated in 2024.

Table 1: ESA BE Pilot Progress through August 31, 2024

Project Status	Number of Homes
Enrollment phase (e.g., home assessment, scope development, etc.)	115
Installation in-progress (e.g., procuring equipment and permit, electrical upgrade, etc.)	160
Installations complete, pending final documentation (e.g., completing Title 24, permit inspection, etc.)	36
Subtotal	311
Homes Treated	64
TOTAL	375

For a detailed breakdown of ESA BE pilot metrics, see the following Tables in Appendix A:

- **ESA Table 2C – Installations & Expenses**
- **ESA Table 5E – Customer Summary**

ESA Clean Energy Homes (CEH) Pilot

In August 2024, SCE collaborated with the Implementer to develop a targeted three-month Strategic Action Plan to address low program enrollment. This plan refocuses outreach efforts by reconnecting the Implementer with SCE’s Local Public Affairs team to coordinate direct outreach to local and city governments and introduce key stakeholders. The Implementer continued to follow up with those who have shown interest in the program, identifying seven unique contacts in August. These efforts resulted in six new interest forms and one new design incentive application, bringing the total to three applications for design incentives, one has been denied.

Current initiatives include working with governments, city agencies, and industry organizations, with individual meetings scheduled for next month. Additionally, new outreach has begun to former BUILD participants for the CEH Tenant Education incentives, identifying ten potential projects. The team will

prioritize five projects at a time, expecting five reservation forms from one developer. Outreach will follow a standard process of two emails and one phone call over a three-week period.

Efforts are also underway to re-engage projects that once showed interest in CEH but have not yet applied. In August, outreach efforts were revamped for direct contact, though one potential participant opted not to enroll due to concerns about delays in their design process, given underwriting deadlines for this project later this year.

Language Line

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

Language	Number of Calls
Mandarin	2
Korean	2

Tribal Outreach

SCE continues to build relationships with Tribal organizations within its service area to invite them to participate in the 2024 mini grant outreach program. As a component of its outreach approach, SCE will collaborate with Tribal leaders, offering mini grants with the purpose of providing training on SCE’s income-qualified programs. The goal is to continue to empower Tribal leaders to serve as intermediaries within their communities, disseminating information about these programs to increase Tribal enrollments and installations. The SCE Tribal team maintains regular engagement with tribes to promote SCE products and services.

In August, the SCE Tribal team was actively involved in key community engagements, including the monthly Morongo Confab and Southern California’s Tribal Emergency Managers’ meetings.

On August 27-28, 2024—SCE, SDG&E, PG&E, the Pechanga Tribe of Indians, and CALSTART came together to host the 2024 CA Tribal Leaders Energy Summit. This event brought together tribal leaders, subject matter experts, administration officials, federal agency partners, state governments, and private industry representatives. The summit aimed to build networks, exchange ideas, and explore cross-cutting, cost-effective solutions to support tribal communities. The event featured informative discussions on topics such as energy efficiency and all-hazards planning. Fourteen exhibitors showcased their resources, and attendees had the opportunity to engage in consultations and networking.

To date, SCE has participated in 26 events. The following tribes are currently engaged in the mini-grant program: Bridgeport Indian Colony and Soboba Band of Luiseno Indians.

SCE is continuously exploring new ways to connect and build trust as a reliable advisor. Recently, Aaron from Local Public Affairs launched the @weavingenergy24 podcast to discuss energy-related topics and educate local tribal communities.

For a detailed breakdown of SCE’s Tribal metrics,

see the following Tables in Appendix A:

- **ESA Table 8 – Clean Energy Referral, Leveraging, and Coordination**
- **ESA Table 9 – Tribal Outreach**

1.2.2 Customer Assistance Marketing, Education and Outreach for the ESA Program.

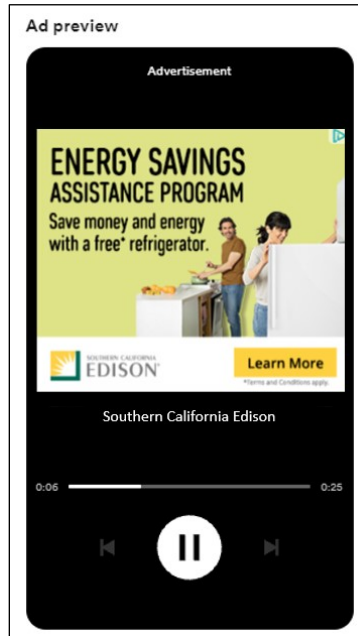
General Awareness Marketing

Online Advertising, Social Media, & Radio

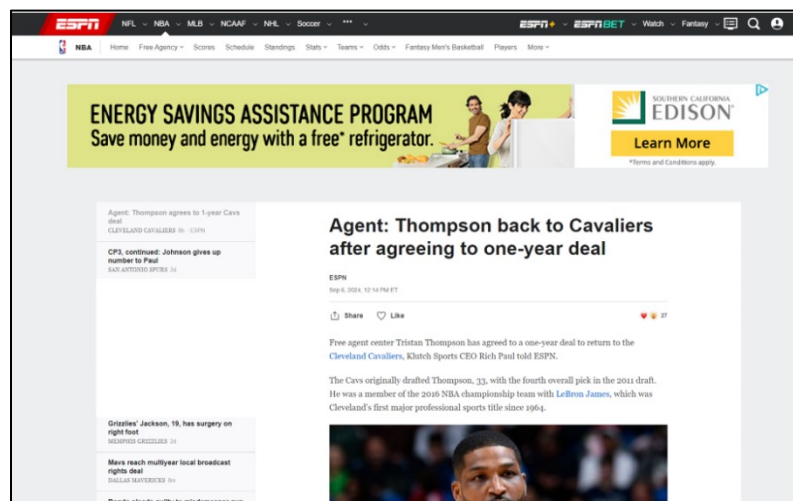
SCE is deploying a multifaceted media campaign including social media, paid search, programmatic banner advertisements and audio/radio streaming. The campaigns continued through August driving awareness among potential participants for the ESA program. Running a multi-channel approach supported strong website activity that outperformed 2023 benchmarks, as seen with spikes in engagement when paid media and email campaigns went live simultaneously. Paid media and email channels contributed to 47% of total intent actions, with paid social contributing as the main source of paid media traffic. Intent actions are visits with a click on the “Apply” button(s) on the ESA landing page on SCE.com. ESA and FERA radio and audio streaming launched in June and has delivered over 600,000 impressions year to date. SCE is working with the third-party marketing agency to measure the effectiveness of the campaigns.

Example of IQP Media Campaign – Audio Streaming:

ESA audio companion banner appears when the audio spot is running.



ESA retargeting banner is served when someone has listened to the ESA audio ad for at least 50% of the ad or more when they have visited the ESA or FERA/CARE landing pages on SCE.com and have not taken a “site action” such as clicks on the apply now button, 800 phone number, etc.



Example of IQP Media Campaign – Paid Social and Paid Search:

ESA PAID SOCIAL

ENGLISH & SPANISH AD UNITS



English



Spanish

ESA PAID SEARCH

ENGLISH & SPANISH AD EXAMPLES

Ad · www.sce.com/IQP/ESA

Southern California Edison | Energy Savings Assistance | Conserve Energy and Save Money

Qualified SCE customers may be eligible for appliance upgrades and energy-saving services. The ESA program helps you conserve energy and save money. Check your eligibility now.

Check Enrollment Status · How to Qualify · Public Assist...
Types: Lighting, Smart Power Strip, Refrigerator Replacement

[Energy Education Guide](#) [Solar for Homeowners](#) [En...](#)

English

Ad · www.sce.com/IQP/ESA

Energy Savings Assistance | Ahorra energía y dinero | Southern California Edison

Los clientes elegibles de SCE podrían recibir aparatos y servicios para ahorrar energía. El programa ESA te ayuda a ahorrar electricidad y dinero. Averigua ahora si calificas. Requisitos · Oferta Básica Plus · Estado de tu solicitud · ...

Types: Iluminación, Cambio del refrigerador, Termostato inteligente

[Más ahorros de energía](#) [Guía energética](#) [Energía](#)

Spanish

Direct Marketing

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

Email

The monthly ESA email campaigns have been successful at driving thousands of customer leads through SCE.com. SCE will temporarily pause email marketing for the next month but will continue to drive leads to SCE.com through various media and radio campaigns. SCE will continue to monitor the leads coming into the system and may start email campaigns back up once these leads are successfully converted to enrollments. ESA contractors will continue to contact these interested customers to complete the enrollment process.

Direct Mail

SCE continues to use a propensity model and works with its third-party marketing agency to identify the residential customers that may have the greatest potential to enroll in the ESA program. SCE started including a QR code on the direct mail letters to give customers an easier way to navigate to the ESA webpage and apply online. Customers who receive a direct mail letter and have opted in to 'Informed Delivery' from the Post Office, will also receive an email with additional ESA messaging. The August campaign was deployed on August 22, 2024. Letters were sent to approximately 60,000 customers. This campaign is testing direct mail to high propensity customers who have received emails in the past but have not yet taken action to apply for ESA.

Example of ESA messaging on the direct mail letter including the new QR code:



SOUTHERN CALIFORNIA EDISON
Energy for What's Ahead®

SAVE MONEY AND ENERGY WITH A FREE* REFRIGERATOR



«Date»

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

«Service Account ending in XXXX at 123 Main Street»

Receive Free Energy-Efficient Appliances That Could Lower Your Bills — For Income-Qualified Homeowners and Renters*

Our Energy Savings Assistance (ESA) program is designed to help you conserve energy and save money. For income-qualified customers, we'll cover the costs of new energy-efficient appliances and more — including installation. And that could even include new energy-saving heat pump products.

Applying Is Easy
You can call your local contractor or go online to apply for ESA and qualify to receive free appliances and products.



Call Direct: Call your local SCE-approved contractor directly.
Contractor: «Contractor Name»
Contractor Phone: «1-800-999-9999»



Online: Visit sce.com/esa. The online application only takes a few minutes to complete. Once processed, you will be referred to an SCE-approved contractor in your area.

The SCE-approved contractor will let you know the appliances and other energy-efficient products that may be available to you at no charge.[‡]

We're Here to Help
To learn more and see household income guidelines, visit sce.com/esa or scan the QR code.

Sincerely,



Carter J. Prescott
Director of Advanced Energy Solutions
Customer Programs & Services





Appliances and Products That Could Save You Money

Whether you own or rent, you may be eligible to receive these upgrades for free:

- Lighting
- Smart Power Strip
- Refrigerator Replacement
- Smart Thermostat
- Thermostatic Shower Valve/ Showerhead
- Clothes Washer Replacement
- Dishwasher Replacement
- Freezer Replacement
- Heat Pump Water Heater Replacement
- Pool Pump Replacement
- Cooling[†]:
 - Evaporative Cooler
 - Evaporative Cooler Maintenance
 - Window or Wall AC Replacement
 - Central AC or Central Heat Pump Replacement
 - Portable AC
- HVAC Filter
- Weatherization Services

[†]These services may not be available in all areas. Certain restrictions may apply for all products and services.

*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.

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Example of email that Informed Delivery sends to customers who receive a piece of direct mail:

**OUR ENERGY SAVINGS ASSISTANCE PROGRAM CAN
REPLACE YOUR HOME
APPLIANCES FOR FREE!***

Available energy-efficient appliances:

- Refrigerator
- Freezer
- Clothes Washer
- Dishwasher
- Heat Pump Water Heater
- ... *and more!*



 SOUTHERN CALIFORNIA
EDISON[®]
Energy for What's Ahead[®]

** Terms and conditions apply.*

 SOUTHERN CALIFORNIA
EDISON[®]
Energy for What's Ahead[®]

**FIND OUT HOW TO GET
YOUR NEW REFRIGERATOR**

Click here >

Co-Marketing

The ESA program is taking advantage of cross-promotional opportunities within SCE, such as co-marketing with other customer programs. SCE produced a trifold brochure that is used in acquisition campaigns for other programs. The brochure highlights various ESA appliances that may be available to customers as well as an electrification measure such as the heat pump water heater. This brochure was included in various program direct mail campaigns over the past few months including the Arrearage Management Plan (AMP) program and for the Medical Baseline Allowance (MBL) program. The ESA brochure was included in the AMP marketing campaign that was sent out to approximately 5,000 customers on August 23, 2024.

Example of ESA Brochure:

Pumped Savings
A heat pump water heater can save a family of four an average of \$550 a year on their electric bill with an expected lifetime savings of \$5,600!⁴



Bombas que ahorran
Un calentador de agua con bomba de calor puede ahorrarle a una familia de cuatro un promedio de \$550 al año en sus facturas de electricidad con un ahorro previsto durante toda su vida útil de \$5,600.⁴

⁴ Source / Fuente: EnergyStar.gov
<https://www.energystar.gov/products/ask-the-experts/when-should-you-replace-your-water-heater>



Cool Savings
Saving an average of approximately 8% on your heating and cooling bills is just the start with a smart thermostat.⁵

Termostatos que ahorran
Ahorrar un promedio de alrededor un 8% en tus facturas de calefacción y refrigeración es solo el comienzo con un termostato inteligente.⁵

⁵ Source / Fuente: EnergyStar.gov
https://www.energystar.gov/products/heating_cooling/smart_thermostats/smart_thermostat_faq

Note: Due to the popularity and high volume of applications, please be patient as we process your request and assign an SCE-approved contractor. Applications are processed in the order they are received, and you may check your status at any time online at sce.com/es/esa.

Nota: debido a la popularidad y al alto volumen de solicitudes, ten paciencia mientras tramitamos tu solicitud y asignamos un contratista aprobado. Las solicitudes se tramitan según el orden en que se reciban, y puedes verificar su estado en cualquier momento en línea en sce.com/es/esa.

*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. 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.

*Energy Savings Assistance Program es financiado por los usuarios de servicios públicos de California y es administrado por Southern California Edison bajo la supervisión de la Comisión de Servicios Públicos de California. El programa y los servicios están disponibles para los usuarios que cumplen los requisitos específicos de ingresos del hogar o que participen en ciertos programas de asistencia pública. Es posible que los servicios no estén disponibles en todas las zonas. Pueden aplicarse ciertas restricciones, tales como la antigüedad, la capacidad y el estado del sistema o electrodoméstico a ser cambiado. Todos los refrigeradores de recambio cumplen con las normas de ENERGY STAR® y consisten en modelos con el congelador en la parte de arriba y sin funciones extra como máquinas de hacer hielo. Los servicios se ofrecen según el orden en que se reciban las solicitudes hasta agotar los fondos o hasta que el programa se interrumpa. Es posible que se requiera un copago para algunos servicios. El programa puede ser modificado o cancelado sin previo aviso. Los consumidores de California no están obligados a comprar ningún servicio de cargo completo ni de ningún otro tipo que no esté cubierto por este programa. Este programa está disponible tanto para los propietarios de viviendas como para los inquilinos que cumplan los requisitos. Es posible que los inquilinos deban obtener la autorización por escrito del propietario antes de la prestación de los servicios.



Energy Savings Assistance Program

SAVE ENERGY AND MONEY WITH FREE* ENERGY-EFFICIENT APPLIANCES



Programa Energy Savings Asistencia

AHORRA ENERGÍA Y DINERO CON ELECTRODOMÉSTICOS DE CONSUMO EFICIENTE GRATUITOS*

©2024 Southern California Edison.

A happy and grateful customer.

"Life evolves, and life keeps getting expensive. The benefits from SCE truly help people in need, like me." Read more about what SCE customer, Daniel Gonzales and his wife have to say about the energy and money-saving benefits they are enjoying from their new free appliances received through SCE's Energy Savings Assistance program. Visit energized.edison.com/stories.

Un cliente feliz y agradecido.

"La vida cambia y se encarece cada vez más. Los beneficios de SCE realmente ayudan a las personas necesitadas como yo". Lee más sobre lo que Daniel Gonzales, cliente de SCE, y su esposa dicen sobre los beneficios de ahorro de energía y dinero que disfrutaron gracias a sus nuevos electrodomésticos gratuitos que recibieron a través del programa Energy Savings Assistance de SCE. Visita energized.edison.com/stories.

SAVING ENERGY = SAVING MONEY

The Energy Savings Assistance (ESA) program delivers and installs new, energy-efficient appliances and products to replace your older, power-hungry models. Today's energy-saving appliances not only use less electricity, but are also good for our environment, improve grid reliability, and may help lower your energy bills! Even better, new appliances and products through the ESA program are provided and installed at no cost*.

Qualify one of two ways.

- Household income limits or
- Participation in a public assistance program

Visit [sce.com/esa](https://www.sce.com/esa) for details.

The difference adds up.

As our state and SCE continue to focus on becoming less dependent on fossil fuels and reducing greenhouse gas emissions, programs like ESA can help make a difference. Plus, a typical household can save about \$450 on their energy bills each year enjoying the quality and performance of energy-efficient appliances.¹

ESA provides a variety of energy-savings appliances and products to make your home more comfortable and energy efficient. Please visit [sce.com/esa](https://www.sce.com/esa) for a complete list.

¹ Source / Fuente: EnergyStar.gov
https://www.energystar.gov/sites/default/files/2022_Overview_of_Achievements.pdf

AHORRO DE ENERGÍA = AHORRO DE DINERO

Energy Savings Assistance o ESA (Programa de ayuda para el ahorro de energía) entrega e instala electrodomésticos y productos nuevos de consumo eficiente para reemplazar sus modelos más antiguos que consumen mucha energía. Los electrodomésticos eficientes modernos no solo consumen menos electricidad, sino que también son positivos para nuestro medio ambiente, mejoran la confiabilidad de la red y pueden ayudar a bajar tus facturas de energía. Y lo que es mejor, los electrodomésticos y productos nuevos del programa ESA se entregan e instalan sin costo alguno*.

Es posible calificar de dos maneras diferentes.


- Límites de ingresos del hogar o
- Participación en un programa de asistencia pública

Visita [sce.com/es/esa](https://www.sce.com/es/esa) para más detalles.

La diferencia suma.

Mientras que en California y SCE continuamos esforzándonos por reducir nuestra dependencia en los combustibles fósiles, así como las emisiones de gases de efecto invernadero, programas como ESA pueden ayudar a marcar la diferencia. Además, un hogar típico puede ahorrar alrededor de \$450 en sus facturas de energía todos los años disfrutando de la calidad y el rendimiento de los electrodomésticos de consumo eficiente.¹

ESA ofrece una variedad de electrodomésticos y productos de ahorro de energía que ayudan a mejorar la comodidad y eficiencia energética de tu hogar. Visita [sce.com/es/esa](https://www.sce.com/es/esa) para una lista completa.



Bright Savings
EnergyStar® dishwashers, on average, are 10% more energy efficient and 20% more water efficient than standard models.³


Lavavajillas que ahorran
En promedio, los lavavajillas EnergyStar® son un 10% más eficientes en el consumo de energía y un 20% más eficientes en el consumo de agua que los modelos estándar.³

³ Source / Fuente: EnergyStar.gov
https://www.energystar.gov/sites/default/files/tools/ENERGY%20STAR%20Appliances%20Brochure_508.pdf

Fresh Savings
An EnergyStar® refrigerator on average uses up to 35% less energy than an older model.²


Refrigeradores que ahorran
Un refrigerador certificado por EnergyStar® consume en promedio hasta un 35% menos electricidad que un modelo más antiguo.²

² Source / Fuente: EnergyStar.gov
<https://www.energy.gov/energysaver/purchasing-and-maintaining-refrigerators-and-freezers>




Presenta tu solicitud ahora. Es muy sencillo.

Entra a [sce.com/es/esa](https://www.sce.com/es/esa) y llena la breve solicitud. Una vez que esta se haya tramitado, un contratista aprobado por SCE se comunicará contigo para evaluar los electrodomésticos y productos nuevos que se encuentran disponibles para ti.⁴



Apply now. It's simple.


Go to [sce.com/esa](https://www.sce.com/esa) and complete the short application. Once processed, an SCE-approved contractor will reach out to you to assess the eligible new appliances and products available to you.⁴



Note: Photos of appliances are shown for illustrative purposes only and are subject to change.

Presenta tu solicitud ahora. Es muy sencillo.

Entra a [sce.com/es/esa](https://www.sce.com/es/esa) y llena la breve solicitud. Una vez que esta se haya tramitado, un contratista aprobado por SCE se comunicará contigo para evaluar los electrodomésticos y productos nuevos que se encuentran disponibles para ti.⁴



Note: las fotos de los electrodomésticos se muestran solo a título ilustrativo y se encuentran sujetas a cambios.

Community Outreach & Engagement

CBO Activities

SCE is committed to implementing additional marketing and outreach activities to increase program awareness and drive customer interest. On a quarterly basis, SCE furnishes updated messaging to Community-Based Organizations (CBOs), which CBOs are encouraged to distribute across their respective networks via email and social media channels. The enhanced outreach efforts are intended to give the CBOs information on the ESA program and help increase program awareness for customers in the communities that are served by ESA.

On August 1, 2024, SCE held a webinar for 53 newly onboarded CBOs that will assist with access and functional needs (AFN) outreach, with a primary focus on safety preparedness. Additionally, we provided a high-level overview of our income-qualified programs.

Multicultural Outreach

No activity for the month of August 2024.

**For a detailed breakdown of SCE’s Customer Segmentation,
see ESA Table 7 in Appendix A.**

Other Customer Engagement Efforts

August Event Highlight:

On August 13, 2024, SCE had the privilege of presenting customer programs and services designed to assist families in need during the Hawthorne City Council Meeting.

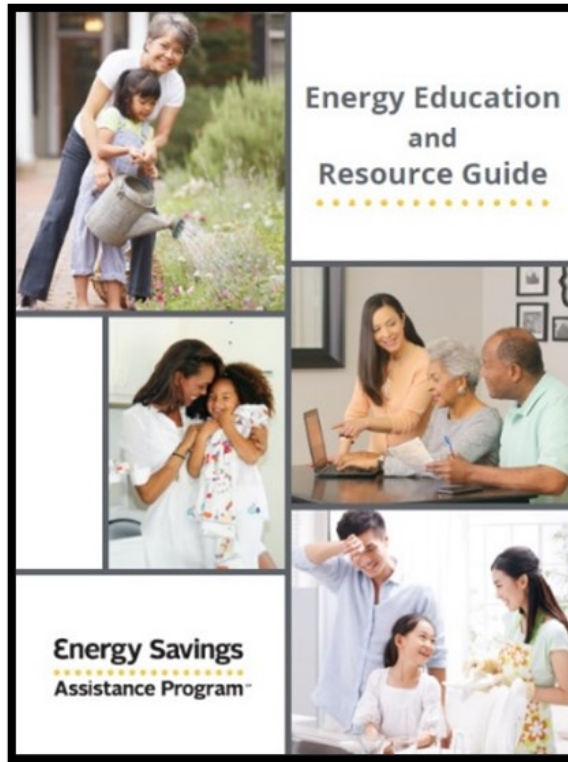
Customer Contact Center (CCC), Branch Offices, and Payment Offices

Customers who call SCE’s customer contact center (CCC) are informed of and referred to the ESA program. Customers are assigned to a contractor in their service area. The ESA contractor follows up on the lead and contacts the customer to assess eligibility and enrollment in the ESA program. In August, SCE received over 1,100 ESA-related calls from interested customers.

1.2.3 Managing Energy Use

SCE contractors regularly go through the ESA program’s Customer Energy Education and Resource Guide with each ESA participant, either face-to-face or through virtual means. The Guide, accessible in print and digital (PDF) formats in seven distinct languages, can also be available in braille upon request. The Guide’s primary objective is to equip low-income customers with the necessary information to help them save energy and decrease their utility expenses. It includes a step-by-step guide on how to register for ‘My Account,’ SCE’s online self-service portal on SCE.com. This portal provides additional resources and opportunities for customers to conserve both time and money, and to engage in residential energy efficiency rebate and demand response programs.

ESA Assistance Program Energy Education and Resource Guide:



1.2.4 Services to Reduce Energy Bill

ESA contractors must provide at least 20 minutes of in-home energy education during their enrollment and assessment visit with the customer. This education covers energy-saving techniques and specific cost-saving strategies for the customer's home. Additionally, contractors provide information on programs like AMP, MBL, and other assistance programs to inform customers about bill-related options for reducing their energy costs. ESA contractors also encourage customers to visit <https://www.SCE.com/residential/assistance> to explore all available programs offered by SCE for financial assistance. ESA contractors serve as a valuable communication channel, informing customers about the benefits and resources available through SCE, state agencies, and local programs.

1.2.5 Additional Activities

ESA Outreach Contractors

SCE is in the process of doing a competitive solicitation to onboard additional ESA agencies to conduct outreach, marketing, and lead generation services. However, unlike ESA enrollment, these agencies will focus on hard-to-reach areas—collecting customer leads in the communities via events and partnerships with other agencies. These companies will not visit homes, but SCE will pass on leads to current contractors. This additional mitigation activity improves program performance, expands outreach and awareness efforts, and increases ESA enrollments for the rest of the program cycle.

SCE conducted the Request-for-Proposal (RFP) Bidders Conference on February 15, 2024. SCE provided an overview of the technical and commercial requirements for the solicitation and answered any questions during the Q&A period. SCE has posted the Bidders Conference and recording to Ariba where any registered bidders may access the material. SCE provided final answers to the questions submitted through the Q&A period on March 15, 2024. Proposals for the RFP were due from bidders on March 21, 2024. SCE completed the scoring, evaluation and negotiation phase of the RFP and completed individual bidder clarification sessions with short listed bidders in July. SCE and the bidders selected for award are currently in the contracting phase.

SASH Program Referrals

Per D.16-11-022, OP 84, SCE is required to provide to the Single-Family Affordable Solar Homes (SASH) Program Administrator (GRID Alternatives), a list of CARE high usage customers in owner-occupied single-family households who have previously participated in the ESA program or have successfully appealed their removal from the CARE rate. On a monthly basis, SCE runs various reports to determine if customers previously enrolled in ESA meet the criteria above. If they do, SCE provides the customer referrals to GRID Alternatives through a SharePoint site established by SCE. In early 2023, the ESA program had low enrollments and from January 2023 to May 2023, there were no

customer referrals to share with GRID Alternatives. From June 2023 to December 2023, there were 25 customer referrals that were not delivered to GRID Alternatives, but this information was provided in February of 2024. SCE had no customer referrals to share in January, February, and March 2024 but provided GRID Alternatives two additional customer referrals in April 2024. SCE had no customer referrals to share in May or June. SCE provided GRID Alternatives referral to one customer in July and four additional customer referrals in August.

1.3 Leveraging Success Evaluation, Including California State Department of Community Services and Development (CSD)

1.3.1 Please provide a status on referrals, of the leveraging and coordination effort with CSD. Expand on activities and success rates across the list of programs from the Coordination Workshop, such as Affordable Broadband and Lifeline, as applicable to ESA, CARE and FERA. What new steps or programs have been implemented? What were the results in terms of new enrollments?

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

The Federal Communications Commission (FCC) has stated that the Affordable Connectivity Program (ACP), designed to aid households in affording broadband internet, ceased accepting applications on February 7, 2023. Its future is uncertain pending reauthorization by Congress. During this transition, SCE will continue to guide customers to the low-cost plan program website for updates: <https://www.internetforallnow.org/offers/low-cost-plans>.

For a detailed breakdown of SCE’s leveraging efforts with CSD, see the following Tables in Appendix A:

- **ESA Table 2E – Installations & Expenses**

- **ESA Table 3G – Energy & Bill Savings**
- **ESA Table 4E – Homes / Buildings Treated**
- **ESA Table 5F – Customer Summary**

1.3.2 Please provide a status on coordination efforts with TECH Clean California.

SCE continues to collaborate with TECH Clean California. When ESA contractors identify upgrades or alterations necessary for installing a Heat Pump Water Heaters (HPWH), they provide these services expecting TECH Clean California to reimburse for the upgrades. In August 2024, three contractors submitted reimbursement requests to TECH for 59 HPWH installations. Contractors work directly with TECH Clean California on these repairs and submit invoices directly to them. These efforts are important and ongoing.

For a detailed breakdown of SCE’s referral, leveraging, and coordination efforts, see ESA Table 8 in Appendix A.

1.4 Workforce Education & Training (WE&T)

1.4.1 Please summarize efforts to improve and expand ESA program workforce education and training. Describe steps taken to hire and train low-income workers and how such efforts differ from prior program years.

SCE continues to encourage ESA contractors to take advantage of its Workforce Education & Training (WE&T) resources. First, SCE’s Energy Education Centers (EEC), located in Irwindale and Tulare, California, offer a wide range of low-cost and free resources for ESA contractors. In August 2024, SCE sent multiple communications via email to all ESA contractors and vendors to keep them informed about the educational offerings at the EEC. These communications serve as a reminder and invitation for them to participate in the

various educational programs; ESA offered 32 courses for contractors and vendors. Some examples of the courses offered during this period include the following:

Course Title	Date	Course Title	Date
Building Electrification Fundamentals 4 – Financial Costs & Benefits of the BE/FS Transition	8/1/2024	How to Electrify Your Home - Planning Considerations	8/8/2024
Lighting Controls for Theatrical Spaces	8/5/2024	Light Bulbs and Dimmers, A Consumer's Guide	8/9/2024
Electrification of the Built Environment Part 1	8/6/2024	NCI: Commercial System Performance Certification Program Par 1- The Key Elements of HVAC System Performance	8/13/2024
Electrification Course for Homeowners	8/7/2024	Introduction to CBECC Energy Modeling Software for Multifamily Buildings	8/13/2024
Electrification of the Built Environment Part 2	8/7/2024	Environmental, Social & Governance (ESG) for Businesses	8/14/2024

Second, SCE contracts with various local private contractors (LPCs), CBOs, and faith-based organizations (FBOs) to provide ESA program services.

Many of these organizations are in low-income and disadvantaged communities. In August 2024, about 856 individuals from these organizations support SCE's ESA program. Also, as of August 31, 2024, SCE has about 50 active ESA program representatives approved to conduct virtual (not in-person) enrollment and assessment activities.

SCE also invited California Emerging Technology Fund (CETF) to present updates and new resources for the Affordable Connectivity Program to our ESA contractors to inform our customers of the new programs offered by the affordable connectivity program.

SCE awarded a contract to Proteus Inc. to implement an Energy Career Training (ECT) program, which aims to equip individuals in low-income and disadvantaged communities (DAC) with soft and technical skills. This program aligns with the WE&T objectives outlined in D.21-06-015, Section 6.13.

The program has several key objectives:

1. **Hiring Local and Disadvantaged Workers:** The ECT program seeks to enable the hiring of local individuals who face disadvantages in the job market.
2. **Career-Ladder Opportunities:** It aims to create opportunities for career development, allowing participants to progress along a career ladder.
3. **Monitoring and Metrics:** The program will establish metrics to monitor its effectiveness in achieving these goals.

The first four weeks of training focus on classroom learning, covering theory and concepts. In addition, the students focus in completing the Occupational Safety and Health Administration (OSHA) 10-hour construction safety training and other topics, including math concepts, construction basics, heat pump measures, refrigeration, pool pump measures, plumbing, electrical, and HVAC installations.

As of July 2024, the group of nine students, who initiated their academic journey on June 26, 2024, and recently concluded their hands-on training in August, from the fifth class, have officially graduated. A sixth class with 10

students enrolled began on July 31, 2024, and is scheduled to be completed on September 27, 2024.

1.5 ESA Program Studies and Pilots

1.5.1 ESA Program Studies

2025 Low Income Needs Assessment (LINA) Study

The 2025 Low Income Needs Assessment (LINA) study officially kicked off in January 2024. SoCalGas is contract managing the study on behalf of the ED and investor-owned utilities (IOUs). The consultant hired to conduct the study is Evergreen Economics (Evergreen). The study will focus on high usage and low usage ESA customers to learn more about measure needs and opportunities based on usage and other considerations. The second draft of the work plan was shared and reviewed by the study team in April. In addition, IOUs established the cofounding agreement and began to solicit NDAs to enable data sharing needed to execute the evaluation. In addition, during April the research plan was presented at an LIOB meeting. This served as the public workshop to solicit feedback from stakeholders on the draft research plan. Given the complexity of the study, during May the research plan was further revised, and IOUs focused on what will be needed for the consultant in terms data needs. Evergreen prepared data requests and the IOUs began to fulfill these requests in June. During August, the sampling plan was finalized and an initial data request was prepared for the IOUs. The study is expected to be completed by December 2025.

ESA/CARE Categorical Study

No additional activity associated with the Categorical Study took place during August. As previously reported, the statewide Categorical Study has been completed. The draft report and results were presented in a public webinar to solicit stakeholder input in May 2023. The final report was posted in June 2023. In October 2023, as required by D.21-06-015, the IOUs submitted an Advice

Letter (AL), based on key findings and the recommendations of the independent evaluation consultant. SCE is waiting on the disposition of the AL.

The study found that of the nine accepted categorical programs, only two (Cal Fresh and WIC) aligned with the income guidelines of the CARE and ESA programs. In addition to those two, the consultant identified Low Income Home Energy Assistance Program (LIHEAP) as well aligned and recommended the program be retained as an option for establishing eligibility for CARE.

Non-Energy Impacts Study

The Non-Energy Impacts Study is a statewide study intended to look at the non-energy impacts, specifically the participant impacts including health, comfort, and safety. SCE is the contract manager for this statewide study. Proposals were received and scored in October of 2023. The study was awarded to a research consulting firm in December 2023. During February 2024, the winning consultant's proposal was shared and discussed with the study working group to obtain initial feedback prior to developing the research plan. SCE's contracting activities continued through cyber security and privacy reviews. The contract with Evergreen was finalized in February 2024. The team continues to revise the work plan.

During May, Evergreen prepared a revised work plan and the team reviewed and provided additional suggestions. Evergreen and the study team continued to refine the draft research plan and potential data needs in June. During July, a public workshop on the draft research plan was held and stakeholders provided comments. During August, given poor reliability in past studies for these types of questions the team drafted, reviewed, and iterated on multiple versions of questions to monetize benefits. The team anticipates pretesting several versions of the questions in the upcoming month. The team continues to outline and provide data to conduct surveys with program participants and non-participants. The study is expected to be completed by June 2025.

1.5.2 ESA Program Pilots

Evaluation of the ESA Whole Home Pilot

The ESA Whole Home (formerly referred to as “Pilot Plus/Deep”) Joint Pilot Evaluation began in October 2022. Illume is the evaluation firm contracted to conduct the evaluation. Given challenges with program implementation, the evaluation team sought to learn more about relevant barriers via discussions with non-participants in early 2024. The team has also worked with the implementer (Maroma) to establish and improve data collection and tracking to ensure the viability of the pilot evaluation. The implementation continues to be slower than expected and based on status thus far, the pilot may not generate the energy savings anticipated by the CPUC when the IOUs were initially directed to design and execute the pilots.

Two milestones were reached in August:

1. Responded to SoCalGas cyber security requests and completed SoCalGas cyber security questionnaire; and
2. Reviewed the latest iterations of the implementation data export for completeness and accuracy, and sent questions to Maroma.

SCE continues to discuss data needs and possible data collection improvements with the implementer and have finished the first round of early participant interviews, which enabled the research team to provide a summary memo on those findings in August. In addition, the study team continues to develop a sample frame for the non-participant survey that launched in late August.

Evaluation of Building Electrification (“BE”) Pilot

The BE pilot evaluation kicked off in December 2022. The evaluation consultant, Illume, continues to refine data collection tools, discuss relevant issues with the program administrator and implementer, and solidify a process to access the gas data required for the evaluation. During the initial part of 2024, the consultant prepared a brief, identifying completed tasks and early findings including feedback received from discussions with contractors and non-

participants. Initial qualitative findings included (1) difficulties contractors have had reaching potential participants due to inaccurate or missing customer contact information as well as (2) lack of interest in pilot participation due to fears of increased energy bills if they consent to electrify their homes. Based on these findings, the team anticipates conducting surveys with non-participants, possibly providing an engineering review of the bill screening tool. The team continues to develop tasks to help understand the success of targeting (one of the pilot objectives). In June, the team continued to work with the implementer to assess additional data needs to conduct an engineering review of the bill screening tool. During August, the team provided initial analysis of the bill screening tool on input data for 10 customers. The team continues to pursue avenues to obtaining post participation gas data from SoCalGas. As part of this process, the team is processing a data diagram for SoCalGas requirements.

Evaluation of Clean Energy Homes Pilot

The CEH pilot evaluation kicked off in February 2022. The consultant hired for the evaluation is Apex Analytics (Apex). SCE reviewed the primary data collection instruments and suggested changes to improve the research effort. The deliverables and dates follow:

Evaluation Phase	Activities
Pre-Implementation (2023) <i>Evaluation Planning</i>	Program document review
	Staff & implementer interviews
	Develop data collection tools
Implementation (2024-2025) <i>Formative Evaluation</i>	Staff and implementer follow-up interviews and monitoring
	Participating builder and developer interviews
Post-Implementation (2025-2026) <i>Summative Evaluation</i>	Evaluation kickoff meeting and updated plan
	Staff and implementer follow-up interviews
	Non-participating builder and developer interviews
	Building simulation modeling

The research team still expects most evaluation activities to occur in late 2024 and early 2025 as ramping continues. If uptake does not meet forecasts, the evaluation could be restructured to focus on what is driving lower than expected uptake. Such a focus could be useful in understanding the potential barriers and in addressing them in real-time to improve uptake sufficiently for impact research to occur. Following the research team’s direction to align the research plan with the current enrollment landscape, the research team held a meeting with program and implementation staff along with a key participating city. The meeting explored programmatic barriers to enrollment for this key customer and this information will inform the research going forward.

In August, the research and implementation teams further discussed how to explain why uptake of the CEH pilot has been lower than expected. The research team attended SCE/Implementer meetings with key participating cities in furtherance of this objective. Follow-up discussions occurred throughout August to support this research objective and the team is setting up one-on-one outreach efforts as well to support a deep dive of pilot enrollment barriers.

For a detailed breakdown of SCE’s expenditures for pilots and studies,
see ESA Table 6 in Appendix A.

2. CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE) EXECUTIVE SUMMARY

2.1 CARE Program Summary

The California Alternate Rates for Energy (CARE) program offers reduced energy rates to low-income households in SCE’s service area, with eligibility based on income up to 200% of the Federal Poverty Guidelines (FPG). CARE assists single-family homes, residents of sub-metered facilities, nonprofit group homes, agricultural employee housing, and migrant farm worker housing. Participants can save 30%-35% on their monthly electricity bills.

2.1.1 Please provide CARE Program summary costs.

CARE Program Summary Costs for 2024			
CARE Budget Categories	Authorized Budget	Actual Expenses Year-to-Date	% of Budget Spent
Outreach	\$ 3,699,872	\$ 1,572,498	43%
Processing, Certification and Verification	\$ 1,615,434	\$ 1,234,375	76%
Post Enrollment Information	\$ 510,137	\$127,879	25%
Tech/Programming	\$ 570,000	\$ 101,769	18%
CHANGES Program	\$ 525,000	\$ 195,533	37%
Studies & Pilots	\$-	\$-	0%
Measure & Evaluation	\$ 36,000	\$ (764)	-2%
Regulatory Compliance	\$ 493,041	\$ 237,352	48%
General Administration	\$ 1,417,444	\$ 1,334,791	94%
CPUC Energy Division	\$ 135,625	\$ 7,953	6%
Total Expenses	\$ 9,002,553	\$ 4,811,386	53%
Subsidies and Benefits	\$ 415,120,450	\$ 559,567,355	135%
Total Program Costs & Discounts	\$ 424,123,003	\$ 564,378,740	133%

For a detailed breakdown of CARE program expenses, see CARE Table 1 in Appendix A.

2.1.2 Provide the CARE Program enrollment rate to date.

CARE Program Enrollment		
Participants Enrolled	Eligible Participants¹⁸	Enrollment Rate
1,356,862	1,302,665	104%

During the latest monthly review of enrollments and disenrollments, SCE discovered a potential issue that could impact the reported figures. SCE is actively investigating to determine the cause of the issue with the goal to resolve any discrepancies before the September Monthly report in October 2024, where an updated status will be provided at that time. To ensure complete transparency, SCE is providing this clarification to the extent that reported numbers get updated based on this issue in the future.

For a detailed breakdown of SCE’s CARE metrics, see the following Tables in Appendix A:

- **CARE Table 2 – Enrollment Overview**
- **CARE Table 3A – Post-Enrollment Verification**
- **CARE Table 3B – High-Use Verification**
- **CARE Table 4 – Enrollment by County**
- **CARE Table 5 – Recertification**
- **CARE Table 8 – Enrollment Rate for High Disconnection, High Poverty, & Disadvantaged Communities by ZIP Code**
- **CARE Table 9 – Lowest Enrollment Rates for High Disconnection, High Poverty, & Disadvantaged Communities by ZIP Code**

¹⁸ On April 15, 2024, PG&E, on behalf of the IOUs, filed the Annual Estimates of CARE and FERA Eligible Customers and Related Information. This number reflects estimates of SCE’s CARE Eligible Participants for 2024.

2.1.3 CHANGES Program

The Community Help and Awareness of Natural Gas and Electric Services (CHANGES) program—designed to support Limited English Proficient (LEP) consumers with energy-related issues through education, case assistance, and outreach—is undergoing significant operational changes.

In July, the CPUC’s Consumer Affairs Branch (CAB) introduced critical contract updates affecting the administration of the CHANGES program that took effect in August. The previous administrator, Self Help for the Elderly (SHE), has opted not to continue its role in implementing CHANGES. Anni Chung, CEO of SHE, expressed gratitude for the opportunity to manage the program since its inception, thanking the IOUs and CPUC for their partnership. Leny Nair, SHE’s CFO, also acknowledged the collaborative efforts.

The CHANGES program will now be administered by the International Institute of Los Angeles (IILA) under the leadership of Cambria Tortorelli. IILA, a longstanding member of the CHANGES statewide consortium since 2010, stepped up as the prime contractor through a collaborative effort with existing CBOs. IILA serves over 50,000 clients annually across Los Angeles, Orange, San Bernardino, and Riverside Counties. Their multilingual and multicultural team of 160 employees speaks 17 languages, providing a broad range of services, including refugee programs, immigration legal services, state-funded preschools, nutrition services, and supportive services, which include CHANGES.

The CHANGES program has secured a two-year contract with an option for each program to extend for up to one year. The contract comes with an annual budget of \$1.68 million. Notable enhancements in the new contract include:

- Expansion of Services: IILA will expand services from current offerings to include the farm and fieldworker community in Madera and surrounding areas.
- Increased Funding Allocation: At least 55% of the total program funding is allocated directly to CBOs providing services to program participants, marking a 5% increase in fund utilization commitment.

- Shared Events Calendar: Introducing a new shared event calendar to foster cross-promotion of events between the CBO Collaborative and other stakeholders.
- Outreach Compensation Model: CBOs will now receive compensation for outreach efforts that attract 500 attendees across multiple events rather than requiring 500 attendees at one event. This change incentivizes outreach at small and large events, effectively reaching the program’s target.

These updates reflect CHANGES’ ongoing changes to enhance support for LEP consumers and strengthen partnerships within the community.

2.2 CARE Marketing & Outreach

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

SCE remains unwavering in its dedication to prioritize outreach and communication efforts for the CARE and FERA programs, particularly focusing on underserved and linguistically diverse communities. These initiatives involve collaboration across various internal SCE departments, including Local Public Affairs, Consumer Affairs, Marketing, Corporate Communications, Strategic Engagement, and Business Solutions. In addition to internal teamwork, SCE actively engages in external outreach activities, establishing partnerships with chambers, foundations, FBOs, and CBOs to effectively reach out to hard-to-reach customer segments. In the second quarter, the Community & Climate Equity (CCE) Team introduced a new platform for capturing outreach activities. This platform features live data and has enhanced event tracking. As of August, SCE has promoted income-qualified programs at 129 events in partnership with cities, non-profits, and local multicultural organizations, focusing on hard-to-reach communities. Of these events, 57.9% were held in disadvantaged communities.

To tailor messages and campaigns to the distinct demographics and target audiences of the CARE and FERA programs, SCE employs a journey style marketing strategy. This approach encompasses a variety of channels to connect with customers through their preferred communication methods, including social

media, text message campaigns, direct mail, email, SCE's website (SCE.com), webinars, collaborations with CBOs, and banner ads in various applications. SCE continued its comprehensive multi-faceted CARE and FERA campaign featuring updated emails and direct mail, which begins with an introduction and follow up to a set of customers highlighted in a funnel analysis. The company's mass media campaign aims to enhance awareness among potential customers regarding the potential energy bill savings achievable by enrolling in CARE or FERA, utilizing channels such as online search, social media, and display ads.

Direct Marketing

SCE focuses on identifying and assisting income-qualified customers who could benefit from its programs.

Email and Direct Mail

SCE continued with its comprehensive and diverse CARE and FERA campaign, incorporating refreshed emails and direct mail. This initiative commenced with an introduction and subsequent follow-up to a group of customers identified through a funnel analysis. Since July, SCE has paused email and direct mail campaigns to accommodate the processing of annual enrollment applications. CARE and FERA customer communication campaigns will resume in September.

Customer Contact Center

SCE's Customer Contact Center (CCC) provides several ways for customers to enroll in the CARE program. Customers can register through the dedicated CARE enrollment toll-free number using the Interactive Voice Response (IVR) system, which also allows them to speak with an agent for help if needed. Additionally, if customers call a different SCE number, they can select an IVR option to get information about SCE programs, including CARE. When customers contact an agent for unrelated matters but mention needing bill

assistance or facing financial difficulties, agents proactively offer information about CARE and other pertinent programs.

No matter how the contact begins, CCC agents emphasize phone-based enrollment services. Customers can be effortlessly transferred to the IVR for direct enrollment when requested, guided to SCE.com for online enrollment, or opt to receive a CARE application via mail.

Community Outreach & Engagement

SCE continued its successful partnership with CBOs, regularly sharing vital information on rates, wildfire, and emergency readiness, as well as CARE, FERA, ESA, and MBL programs, to engage effectively with the diverse communities associated with each CBO.

Further details on optimizing the advantages of these ongoing collaborations can be found in *Section 2.2.1*, above.

Tribal Outreach

See *Section 1.2.1*, Tribal Outreach.

CARE Partners (Capitation Agencies)

The Capitation Fee Program is intended to encourage CBOs to partner with SCE to assist with SCE's hardest-to-reach customer populations with enrollment in the CARE and FERA programs. The program reimburses organizations helping income-qualified customers gain assistance through the CARE or FERA programs.

The Capitation Fee Program team is continuing its efforts to engage existing Capitation Agencies (those CBOs participating in the Capitation Fee Program) while strategically registering additional contractors to overcome enrollment barriers, including language, culture, and special needs, to enroll the hardest-to-reach customers. Because of these efforts, the Capitation Fee Program continues to show enrollments from agencies that were previously inactive. As

part of SCE’s strategy to bolster FERA enrollments, SCE strives to recruit Capitation Agencies dedicated to recruiting FERA customers.

SCE currently has 60 Capitation Agencies. In August, Capitation Agencies successfully enrolled 312 new customers in the CARE program. Current and ongoing campaign strategies and efforts include:

- Leveraging events sponsored by communities and cultural celebrations to reach populations that may be eligible to enroll in the CARE program;
- Partnering with SCE personnel to leverage existing SCE relationships with FBOs, CBOs, and local governments; and
- Utilizing existing channels to develop creative approaches for agencies to conduct CARE/FERA outreach, including community-based virtual outreach events and fairs.

CARE Capitation Agencies	
ESA Leads	NA
CARE Enrollments	312
CARE Recertification	NA

For a detailed breakdown of CARE Capitation Agency expenditures, see CARE Table 6 in Appendix A.

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

SCE enrolls new CARE customers through the Energy Assistance Fund (EAF) program. EAF is an income-qualified program that helps residential households pay their electricity bills. EAF is funded through voluntary donations from SCE employees, shareholders, and customers. EAF partners with United Way of Greater Los Angeles and 80+ CBOs to process assistance requests and applications. In August 2024, 89 customers who received EAF grants were enrolled in CARE.

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

SCE coordinates CARE enrollments with other income-qualified programs, such as ESA, LIHEAP, and other utility companies, including SoCalGas and certain water utilities. ESA participants are automatically enrolled in CARE each month, if they agree to be enrolled in their application form. As described in this report, the CARE program continuously makes efforts to integrate messaging with the ESA program at outreach events, through communications, and through marketing campaigns that inform attendees about the ESA and CARE programs available to qualifying customers.

SCE consistently incorporates AMP messaging across various CARE/FERA materials, including the updated application form and recently produced direct mail campaign letters. Additionally, SCE has recently improved its website by integrating a link to the AMP application when eligible CARE/FERA customers log into their accounts via My Account. Efforts have been completed to add an AMP link in order to inform customers about the AMP program when they are submitting a CARE/FERA application online.

2.3 CARE Recertification Complaints

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

For the month of August 2024, the CARE/FERA support team(s) received no complaints for CARE.

2.4 CARE Studies and Pilots

2.4.1 CARE Program Studies

2025 Low Income Needs Assessment (LINA) Study

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

ESA/CARE Categorical Study

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

CHANGES Evaluation

D.21-06-015 required two evaluations to be conducted during the program cycle for the CHANGES program. The first was completed in 2023. In February 2024, the Commission and study team began to discuss the scope of the second evaluation. PG&E will be the contract manager for the upcoming study on behalf of the IOUs and CPUC. During June, a follow up meeting was set up by PG&E to revisit the second evaluation required for the program cycle. The CPUC staff within the Consumer Affairs Branch (CAB) is responsible for directing and managing the study, including developing the scope of work. During August, the study team continued to discuss work scope for the second CHANGES evaluation of this program cycle. The IOUs provided input on the initial draft work scope and suggested CAB revisit program goals and clearly identify the purpose of CHANGES to better align the evaluation expectations with the program’s goals. The CAB has not solidified the direction and approved the final work scope. PG&E expects to provide the team with a draft work scope for the second evaluation in September.

2.4.2 CARE Program Pilots

There are no CARE pilots at this time.

For a detailed breakdown of SCE’s expenditures for Pilots and Studies, see CARE Table 7 in Appendix A.

2.5. CARE Program PEV Freezes

Per D.19-07-015, the emergency relief program activates upon an Emergency Protection Order (EPO) by the Governor of California or the President of the United States. Customers qualify for consumer protections when

experiencing utility service disruption, quality decline, or loss due to a disaster related to the EPO. Protections begin from the EPO date, lasting at least 12 months or longer as determined by the Governor’s Office of Emergency Services. Utilities are encouraged to extend support beyond regulations, potentially offering additional assistance programs.

SCE suspends removals from CARE and FERA programs to maintain customer discounts during the protected period. Recertification requests are delayed until 30 days after the protection period ends, and Post Enrollment Verification (PEV) freezes are implemented as part of these protections.

Zip code selection is based on whether the “event” created an outage lasting 24-hours or more in a zip code included in the declaration. As of August 31, 2024, 327 of 771 ZIP codes are presently under EPO protections.

Count of Zip Codes	EPO Expiration Date
1	01/23/2025
299	02/19/2025
8	06/01/2025
19	08/04/2025

2.6 CARE Fixed Income

N/A for August 2024.¹⁹

¹⁹ SCE is in the process of updating its reporting capabilities; the data is not available for reporting at this time. This is an IOU-suggested reporting element and not an Energy Division-specific reporting requirement.

3. FAMILY ELECTRIC RATE ASSISTANCE (FERA) EXECUTIVE SUMMARY

3.1 FERA Program Summary

The Family Electric Rate Assistance (FERA) program offers eligible income-qualified households within SCE’s service area a monthly discount on energy rates. To qualify, households with three or more members must have incomes above 200% but not exceeding 250% of the Federal Poverty Guidelines (FPG). Participating households, including single-family residences and those in sub-metered facilities, can save 18% on their electric bills.²⁰

In 2024, SCE aims to maintain its efforts towards achieving a 60% adoption rate of FERA among eligible households. To support this goal, SCE plans to launch a dedicated FERA informational flyer. This flyer will offer detailed enrollment information accessible through SCE’s online portal or toll-free IVR system. Also, customers can submit the CARE/FERA application by mail, conveniently provided on the reverse side of the flyer.

3.1.1. Please provide FERA Program summary costs.

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

FERA Program Summary Costs for 2024			
FERA Budget Categories	Authorized Budget	Actual Expenses Year-to-Date	% of Budget Spent
Outreach	\$ 800,244	\$ 136,832	17%
Processing / Certification and Verification	\$ 403,858	\$ 65,956	16%
Post Enrollment Verification	\$ 127,534	\$ 6,342	5%
Information/Tech Programming	\$ 30,000	\$ 87,616	292%
Pilots	\$ -	\$ -	0%
Studies	\$ 24,000	\$ -	0%
Regulatory Compliance	\$ 15,905	\$ -	0%
General Administration	\$ 45,724	\$ 31,545	69%
CPUC Energy Division Staff	\$ 4,375	\$ -	0%

²⁰ See Pub. Util. Code § 739.12.

Total Expenses	\$ 1,451,640	\$ 328,291	23%
Subsidies and Benefits	\$ 46,164,249	\$ 9,773,019	21%
Total Program Costs & Discounts	\$ 47,615,889	\$ 10,101,310	21%

For a detailed breakdown of FERA expenditures, see FERA Table 1 in Appendix A.

3.1.2 Provide the FERA Program enrollment rate to date.

FERA Enrollment		
Participants Enrolled	Eligible Participants²¹	Enrollment Rate
32,178	211,756	15%

During the latest monthly review of enrollments and disenrollments, SCE discovered a potential issue that could impact the reported figures. SCE is actively investigating to determine the cause of the issue with the goal to resolve any discrepancies before the September Monthly report in October 2024, where an updated status will be provided at that time. To ensure complete transparency, SCE is providing this clarification to the extent that reported numbers get updated based on this issue in the future.

For a detailed breakdown of SCE’s FERA metrics, see the following Tables in Appendix A:

- **FERA Table 2 – Enrollment Overview**
- **FERA Table 3A – Post-Enrollment Verification**
- **FERA Table 3B – High-Use Verification**
- **FERA Table 4 – Enrollment by County**

²¹ On April 15, 2024, PG&E, on behalf of the IOUs, filed the Annual Estimates of CARE and FERA Eligible Customers and Related Information. This number reflects estimates of SCE’s FERA Eligible Participants for 2024.

- **FERA Table 5 – Recertification**

3.2 FERA Marketing & Outreach

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

SCE’s FERA outreach aligns closely with CARE initiatives, involving internal partners such as SCE’s Consumer Affairs and Corporate Communications, and external agencies like FBOs and CBOs. Through data-driven funnel analysis, SCE aims to achieve a 60% FERA penetration goal by late 2024. This ongoing campaign utilizes multiple channels including social media, text messages, direct mail, email, SCE.com, webinars, CBOs, and banner ads to engage with FERA customers. Leveraging digital communication and email strategies, SCE aims to effectively market and boost FERA participation.

Direct Marketing

Direct Email and Mail

See *Section 2.2.1* for Direct Email and Direct Mail.

Community Outreach & Engagement

See *Section 2.2.1* for joint Community Outreach and Engagement with CARE.

Tribal Outreach

See *Section 1.2.1* Tribal Outreach.

FERA Partners (Capitation Agencies)

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

For a detailed breakdown of FERA Capitation Agency expenditures, see FERA Table 6 in Appendix A.

3.3 FERA Recertification Complaints

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

For the Month of August 2024, the CARE/FERA support team(s) received zero recertification complaints for FERA.

3.4 FERA Studies and Pilots

3.4.1 FERA Program Studies

There are no active studies on the FERA program.

3.4.2 FERA Program Pilot

The FERA Nurture Pilot is a strategic telemarketing initiative designed to interact with and educate customers who have received a FERA direct mail letter or email but initially opted not to enroll. The focus of the pilot is to deliver personalized information about the FERA discount and address any specific

concerns or issues that customers may have. Launched by SCE, the calling operations of this initiative began on June 19, 2023.

For August 2024, a decision was made to temporarily suspend pilot efforts due to insufficient customer response and the potential impact of pending legislation (SB 1130) on the FERA program.

Proposed amendments to SB 1130 aim to differentiate the marketing strategies for the CARE and FERA programs. Additionally, these changes advocate for the removal of household eligibility limits for the FERA program. These adjustments are anticipated to broaden the eligible population, potentially increasing enrollment.

SB 1130 was passed and approved by the State Legislature and is now awaiting the Governor's review for either approval or veto. Once a final decision is made, the pilot will continue with the new direction(s) considered.

Appendix A

ESA, CARE, AND FERA PROGRAM TABLES

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

4.1 ESA Program Tables

ESA Summary – Expenses Summary

ESA Program – Table 1 – Main (SF, MH) Expenses

ESA Program – Table 2 – Main (SF, MH) Summary

ESA Program – Table 2A – Multifamily Whole Building (MFWB)

ESA Program – Table 2B – Pilot Plus and Pilot Deep

ESA Program – Table 2C – Building Electrification Retrofit Pilot

ESA Program – Table 2D – Clean Energy Homes New Construction Pilot

ESA Program – Table 2E – CSD Leveraging

ESA Program – Table 3A, 3B, 3C, 3D, 3F, 3G & 3H – Energy Savings and Average Bill Savings per Treated Home/Common Area

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

ESA Program – Table 5A, 5B, 5C, 5D, 5E & 5F – Program Customer Summary

ESA Program – Table 6 – Expenditures for Pilots and Studies

ESA Program – Table 7 – Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions

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

ESA Program – Table 9 – Tribal Outreach

4.2 CARE Program Tables

CARE Program – Table 1 – Program Expenses

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

CARE Program – Table 3A & 3B – Post-Enrollment Verification Results (Model & Electric only High Usage)

CARE Program – Table 4 – Enrollment by County

CARE Program – Table 5 – Recertification Results

CARE Program – Table 6 – Capitation Contractors

CARE Program – Table 7 – Expenditures for Pilots and Studies

CARE Program – Table 8 – Disadvantaged Communities Enrollment Rate for Zip Codes

CARE Program – Table 9 – CARE Top 10 Lowest Enrollment Rates in High Disconnection, High Poverty, and DAC by Zip Code

4.3 FERA Program Tables

FERA Program – Table 1 – Program Expenses

FERA Program – Table 2 – Enrollment, Recertification, and Attrition

FERA Program – Table 3A & 3B – Post-Enrollment Verification Results (Model & Electric only High Usage)

FERA Program – Table 4 – Enrollment by County

FERA Program – Table 5 – Recertification Results

FERA Program – Table 6 – Capitation Contractors

**Energy Savings Assistance Program - Expenses Summary
Southern California Edison
Through August 2024**

ESA Program:	Authorized Budget			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Main Program (SF and MH) ^[1]	\$ 59,458,992		\$ 59,458,992	\$ 4,862,931		\$ 4,862,931	\$ 31,639,294		\$ 31,639,294	53%	0%	53%
ESA Multifamily Whole Building ^{[1][3]}	\$ 15,784,061		\$ 15,784,061	\$ 290,859		\$ 290,859	\$ 946,280		\$ 946,280	6%	0%	6%
ESA Pilot Plus and Pilot Deer	\$ 3,884,864		\$ 3,884,864	\$ 61,137		\$ 61,137	\$ 377,193		\$ 377,193	10%	0%	10%
Building Electrification Retrofit Pilo	\$ 10,252,080		\$ 10,252,080	\$ 288,458		\$ 288,458	\$ 1,300,806		\$ 1,300,806	13%	0%	13%
Clean Energy Homes New Construction Pilot ^[2]	\$ 1,775,000		\$ 1,775,000	\$ 17,963		\$ 17,963	\$ 411,756		\$ 411,756	23%	0%	23%
Single Point of Contact (SPOC) - MFWE	\$ 171,929		\$ 171,929	\$ 13,091		\$ 13,091	\$ 87,652		\$ 87,652	51%	0%	51%
SASH/MASH Unspent Funds ^[3]	\$ 6,159,288		\$ 6,159,288	\$ -		\$ -	\$ -		\$ -	0%	0%	0%
ESA Program TOTAL	\$ 96,282,711		\$ 96,282,711	\$ 5,534,438		\$ 5,534,438	\$ 34,762,982		\$ 34,762,982	36%	0%	36%

^[1] YTD Expense does not include \$7,692,358 Co-Funding Agreement payment to SDG&E (lead utility). Expenses will be reported as they are incurred.

^[2] Reflects the revised budget approved in AL 4664-E, December 15, 2021.

^[3] 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 measure low-income residential housing that benefit ratepayers,' as set forth in Public Utilities Code Section 2852(c)(3)." SCE and Pacific Gas and Electric (PG&E) submitted a joint Advice Letter 5106-E for the disposal of the unspent funds from the SASH and MASH programs to the ESA program on September 20, 2023. AL 5106-E was approved on October 20, 2023. Transfer of unspent MASH and SASH program funds from California Solar Initiative Program Balancing Account (CSIPBA) was completed November 2023.

^[4] \$9M in advance payments paid to ESA contractors is not included in the total expenses.

^[5] YTD adjusted to separate out SPOC costs as it is reported on row 12 and includes administrative costs previously not included.

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

**Energy Savings Assistance Program Table 1 - Main (SF, MH) Expenses
Southern California Edison
Through August 2024**

Appliances	Authorized Budget ^[1]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Program:												
Energy Efficiency	\$ 50,221,660		\$ 50,221,660			\$ -			\$ -			
Appliances			\$ -	\$ 1,291,978		\$ 1,291,978	\$ 8,356,792		\$ 8,356,792			
Domestic Hot Water			\$ -	\$ 371,639		\$ 371,639	\$ 1,688,972		\$ 1,688,972			
Enclosure			\$ -	\$ 810		\$ 810	\$ 13,129		\$ 13,129			
HVAC			\$ -	\$ 1,238,679		\$ 1,238,679	\$ 6,778,157		\$ 6,778,157			
Maintenance			\$ -	\$ 33,712		\$ 33,712	\$ 436,023		\$ 436,023			
Lighting			\$ -	\$ 127,329		\$ 127,329	\$ 826,119		\$ 826,119			
Miscellaneous			\$ -	\$ 353,941		\$ 353,941	\$ 2,461,432		\$ 2,461,432			
Customer Enrollment			\$ -	\$ 625,699		\$ 625,699	\$ 4,639,441		\$ 4,639,441			
In Home Education			\$ -	\$ 82,012		\$ 82,012	\$ 604,046		\$ 604,046			
Pilot			\$ -	\$ -		\$ -	\$ -		\$ -			
Energy Efficiency TOTAL^[1]	\$ 50,221,660	\$ -	\$ 50,221,660	\$ 4,125,799	\$ -	\$ 4,125,799	\$ 25,804,112	\$ -	\$ 25,804,112	51%		51%
Training Center	\$ 450,488		\$ 450,488	\$ -		\$ -	\$ 198,893		\$ 198,893	44%		44%
Workforce Education and Training	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Inspections	\$ 864,125		\$ 864,125	\$ 106,557		\$ 106,557	\$ 653,136		\$ 653,136	76%		76%
Marketing and Outreach	\$ 2,346,963		\$ 2,346,963	\$ 12,702		\$ 12,702	\$ 1,321,481		\$ 1,321,481	56%		56%
Studies	\$ 290,000		\$ 290,000	\$ 35,395		\$ 35,395	\$ 100,817		\$ 100,817	35%		35%
Regulatory Compliance	\$ 720,611		\$ 720,611	\$ 50,448		\$ 50,448	\$ 584,563		\$ 584,563	81%		81%
General Administration ^[2]	\$ 4,513,566		\$ 4,513,566	\$ 532,029		\$ 532,029	\$ 2,975,061		\$ 2,975,061	66%		66%
CPUC Energy Divisor	\$ 51,579		\$ 51,579	\$ -		\$ -	\$ 1,232		\$ 1,232	2%		2%
Administration Subtotal	\$ 9,237,332		\$ 9,237,332	\$ 737,132		\$ 737,132	\$ 5,835,183		\$ 5,835,183	63%		63%
TOTAL PROGRAM COSTS	\$ 59,458,992		\$ 59,458,992	\$ 4,862,931		\$ 4,862,931	\$ 31,639,294		\$ 31,639,294	53%		53%
Funded Outside of ESA Program Budget												
Indirect Costs				\$ 125,746		\$ 125,746	\$ 1,042,156		\$ 1,042,156			
NGAT Costs												
ESA Program Administrative Expenses^[3]												
Administrative Expenses ^{[3][6]}				\$ (119,193)		\$ (119,193)	\$ 2,029,289		\$ 2,029,289			
Total Program Costs				\$ 4,862,931		\$ 4,862,931	\$ 31,639,294		\$ 31,639,294			
% of Administrative Spend						-2%			6%			

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

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

^[3] D.21-06-015, OP 112 - "Pacific Gas and Electric Company, Southern California Edison Company, Southern California Gas Company and San Diego Gas & Electric Company's Energy Savings Assistance (ESA) program administrative expenses are capped at either 10 percent of total program costs, or the Utility's historical five-year average spend on administrative costs as a percentage of total program costs, whichever is greater. The use of the historical five-year average spend will be phased out such that the Utilities must propose to spend no more than 10 percent of total program costs on administrative costs starting in program year 2024. The definition and categorization of administrative cost for the ESA program will be consistent with that of the main energy efficiency program."

^[4] \$9M in advance payments paid to ESA contractors is not included in the total expenses.

^[5] Administrative Expenses adjusted to be consistent with the Energy Efficiency program administrative costs categories.

^[6] The decrease in current month's Admin Expense is due to adjustments made to previous reported amounts.

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

Energy Savings Assistance Program Table 2 - Main (SF, MH) Summary
Southern California Edison
Through August 2024

Measures	Basic	Plus	Units	ESA Main Program (Summary) Total					
				Year-To-Date Completed & Expensed Installation					
				Quantity Installed	kWh ^[1] (Annual)	kW ^[1] (Annual)	Therms ^[1] (Annual)	Expenses (\$)	% of Expenditure
Appliances									
High Efficiency Clothes Washer	x		Home	10	943	0	-	\$ 12,738	0.0%
Refrigerator	x		Home	5,790	3,334,827	400	-	\$ 7,774,868	30.1%
New - Clothes Dryer	N/A	N/A	Each	-	-	-	-	\$ -	0.0%
New - Dishwasher	x		Each	28	1,572	(0)	-	\$ 23,110	0.1%
Freezers	x		Each	483	409,584	49	-	\$ 546,076	2.1%
Domestic Hot Water									
Faucet Aerator	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
Other Domestic Hot Water ^[6]	x		Home	46	-	-	-	\$ 2,280	0.0%
Water Heater Tank and Pipe Insulation	x		Home	11	517	0	-	\$ 334	0.0%
Water Heater Repair/Replacement	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
Low-Flow Showerhead	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
Combined Showerhead / TSV	x		Each	1	26	0	-	\$ 94	0.0%
Heat Pump Water Heater - Electric	x		Each	13	21,101	3	-	\$ 99,185	0.4%
Heat Pump Water Heater - Gas	x		Each	338	(512,654)	(31)	-	\$ 1,585,906	6.1%
Heat Pump Water Heater - Propane	x		Each	-	-	-	-	\$ -	0.0%
Heat Pump Water Heater	N/A	N/A	Each	-	-	-	-	\$ -	0.0%
Thermostatic Tub Spout/Diverter	N/A	N/A	Each	-	-	-	-	\$ -	0.0%
Thermostatic Shower Valve	x		Each	20	975	0	-	\$ 1,173	0.0%
New - Solar Water Heating	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
Enclosure									
Air Sealing ^[7]	x		Home	24	3,136	0	-	\$ 7,093	0.0%
Caulking	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
New - Diagnostic Air Sealing	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
Attic Insulation	x		Home	2	430	0	-	\$ 6,036	0.0%
New - Attic Insulation CAC NonElect Heat ^[8]	x		Home	-	-	-	-	\$ -	0.0%
New - Floor Insulation	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
HVAC									
Removed - FAU Standing Pilot Conversion	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
Furnace Repair/Replacement	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
Room A/C Replacement		x	Home	81	(13,770)	(2)	-	\$ 87,263	0.3%
Central A/C replacement		x	Home	428	139,854	21	-	\$ 3,060,432	11.9%
Heat Pump Replacement		x	Home	17	20,417	9	-	\$ 636,600	2.5%
New - Heat Pump Replacement - CAC Gas		x	Each	75	(37,067)	65	-	\$ 657,677	2.5%
New - Heat Pump Replacement - CAC Propane		x	Each	-	-	-	-	\$ -	0.0%
Evaporative Cooler (Replacement)		x	Home	-	-	-	-	\$ -	0.0%
Evaporative Cooler (Installation)		x	Home	1,286	698,165	105	-	\$ 1,605,090	6.2%
Duct Test and Seal ^[9]	N/A	N/A	Home	552	-	-	-	\$ 206,717	0.8%
Energy Efficient Fan Control		x	Home	46	7,074	4	-	\$ 32,342	0.1%
New - Prescriptive Duct Sealing	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
High Efficiency Forced Air Unit (HE FAU)	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
Removed - A/C Time Delay	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
Smart Thermostat	x		Home	1,253	345,819	-	-	\$ 388,834	1.5%
New - Portable A/C		x	Each	122	(51,477)	(66)	-	\$ 103,201	0.4%
New - Central Heat Pump-FS (propane or gas space)		x	Home	-	-	-	-	\$ -	0.0%
New - Wholehouse Fan	N/A	N/A	Each	-	-	-	-	\$ -	0.0%
Maintenance									
Furnace Clean and Tune	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
Central A/C Tune up		x	Home	835	104,394	87	(1)	\$ 122,421	0.5%
New - Condenser Coil Cleaning		x	Each	-	-	-	-	\$ -	0.0%
New - Fan Control Adjust		x	Each	174	2,735	3	-	\$ 19,513	0.1%
New - Refrigerant Charge Adjustment		x	Each	-	-	-	-	\$ -	0.0%
New - Evaporator Coil		x	Each	-	-	-	-	\$ -	0.0%
HVAC Air Filter Service		x	Each	1,221	10,833	15	-	\$ 63,623	0.2%
New - Evaporative Cooler - Maint Functioning		x	Each	782	161,386	198	-	\$ 119,404	0.5%
New - Evaporative Cooler - Maint Non-Functioning		x	Each	601	151,741	174	-	\$ 111,062	0.4%
New - Evaporative Cooler Maintenance		x	Home	-	-	-	-	\$ -	0.0%
Lighting									
Removed - Interior Hard wired LED fixtures	N/A	N/A	Each	-	-	-	-	\$ -	0.0%
Exterior Hard wired LED fixtures	x		Each	1,300	18,928	-	-	\$ 121,165	0.5%
Removed - LED Torchiere			Each	-	-	-	-	\$ -	0.0%
Removed - Occupancy Sensor	N/A	N/A	Each	-	-	-	-	\$ -	0.0%
Removed - LED Night Light	N/A	N/A	Each	-	-	-	-	\$ -	0.0%
LED Reflector Bulbs	x		Each	1,224	26,472	3	(14)	\$ 10,110	0.0%
LED A-Lamps	x		Each	85,231	3,243,946	394	(1,258)	\$ 694,844	2.7%
Miscellaneous									
Pool Pumps	x		Home	306	306,306	95	-	\$ 533,060	2.1%
Power Strip	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
Power Strip Tier II	x		Each	31,678	4,426,347	887	(453)	\$ 1,928,371	7.5%
New - Air Purifier	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
Cold Storage	N/A	N/A	Each	-	-	-	-	\$ -	0.0%
New - Comprehensive Home Health and Safety Check-up	N/A	N/A	Home	-	-	-	-	\$ -	0.0%
New - CO and Smoke Alarm	N/A	N/A	Each	-	-	-	-	\$ -	0.0%

**Energy Savings Assistance Program Table 2 - Main (SF, MH) Summary
Southern California Edison
Through August 2024**

Pilots								
Customer Enrollment								
ESA Outreach & Assessment			Home	30,131			\$ 4,639,441	18.0%
ESA In-Home Energy Education			Home	19,790			\$ 604,046	2.3%
Total Savings/Expenditures					12,822,559	2,416	(1,725)	\$ 25,804,112
Total Households Weatherized ^[2]				28				

Households Treated			
- Single Family Households Treated		Total	Home
- Mobile Homes Treated		Home	22,193
Total Number of Households Treated		Home	4,126
# Eligible Households to be Treated for PY^[3]		Home	26,319
% of Households Treated		%	64,922
- Master-Meter Households Treated		Home	41%
			208

ESA Program - Main	Year to Date Expenses ^[4]		
	Electric	Gas	Total
Administration ^[5]	\$ -		\$ -
Direct Implementation (Non-Incentive)	\$ -		\$ -
Direct Implementation	\$ 25,804,112		\$ 25,804,112
TOTAL ESA Main COSTS	\$ 25,804,112	\$ -	\$ 25,804,112

<<Includes measures costs

^[1] Savings are based on DNV/GL Impact Evaluation Program Years 2015-2017 for measures studied by that evaluation. Savings for all other measures are based on SCE or Statewide Work Papers.

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

^[3] Based on authorized 2024 Program Year budget approved in CPUC Decision 21-06-015 (June 13, 2021).

^[4] Total ESA Main YTD expenses are reported in ESA Table 1.

^[5] Please see ESA Table 1 for Administration Costs.

^[6] Other Domestic Hot Water includes Faucet Aerators and Low Flow Showerheads.

^[7] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

^[8] Attic insulation for homes not heated by electricity or IOU-provided natural gas. Must have central AC.

^[9] SCE performs Duct Test and Seal only as required by Title 24 as part of HVAC replacements. Costs and savings are embedded in the HVAC costs and savings.

NOTES:

-Any measures noted as 'New' have been added during the course of this program year.

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

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

Energy Savings Assistance Program Table 2A - Multifamily Whole Building (MFWB)
Southern California Edison
Through August 2024

Table 2A ESA Program - Multifamily Whole Building									
Year-To-Date Completed & Expensed Installation									
Measures	Units (of Measure such as "each")	Measure Type (In-unit vs Common Area)⁽³⁾	Quantity Installed	Number of Units for Cap-kBTU/h and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances									
High Efficiency Clothes Washer	Each	In-Unit	-	-	-	-	-	\$ -	0%
Refrigerator	Each	In-Unit	6	-	3,258	0.39	-	\$ 7,827	4%
Domestic Hot Water									
New: Non-Condensing Domestic Hot Water Boiler	Cap-kBtu/h	CAM/WB	-	-	-	-	-	\$ -	0%
New: Condensing Domestic Hot Water Boiler	Cap-kBtu/h	CAM/WB	-	-	-	-	-	\$ -	0%
Storage Water Heater	Cap-kBtu/h	CAM/WB	-	-	-	-	-	\$ -	0%
Tankless Water Heater	Cap-kBtu/h	CAM/WB	-	-	-	-	-	\$ -	0%
Heat Pump Water Heater	kW	CAM/WB	-	-	-	-	-	\$ -	0%
Demand Control DHW Recirculation Pump	Each	CAM/WB	-	-	-	-	-	\$ -	0%
Low flow Showerhead	Each	In-Unit	640	-	496	0.10	424	\$ 6,485	3%
Faucet Aerator	Each	In-Unit	1,083	-	686	0.13	709	\$ 3,543	2%
Thermostatic Tub Spout/Diverter	Each	In-Unit	203	-	-	-	-	\$ 6,001	3%
Thermostatic Shower Valve	Each	In-Unit	103	-	-	-	3	\$ 1,263	1%
Water Heater Tank and Pipe Insulation	Household	In-Unit	-	-	-	-	-	\$ -	0%
Water Heater Repair/Replacement	Household	In-Unit	-	-	-	-	-	\$ -	0%
Heat Pump Water Heater	Each	In-Unit	-	-	-	-	-	\$ -	0%
Hot Water Pipe Insulation	Each	CAM/WB	-	-	-	-	-	\$ -	0%
Boiler Controls	Each	CAM/WB	-	-	-	-	-	\$ -	0%
TSV and Low Flow Showerhead	Each	In-Unit	6	-	-	-	-	\$ 71	0%
Envelope									
Attic Insulation	Sq Ft	CAM/WB	-	-	-	-	-	\$ -	0%
Wall Insulation Blow-in	Sq Ft	CAM/WB	-	-	-	-	-	\$ -	0%
Windows	Sq Ft	CAM/WB	-	-	-	-	-	\$ -	0%
Window Film	Sq Ft	CAM/WB	-	-	-	-	-	\$ -	0%
Air Sealing	Household	In-Unit	471	-	-	-	-	\$ 7,125	4%
Attic Insulation	Household	In-Unit	-	-	-	-	-	\$ -	0%
Repair Ceiling/Floor/Wall (Interior/Exterior)	Sq Ft	In-Unit	86	-	-	-	-	\$ 1,425	1%
HVAC									
Air Conditioners Split System	Cap-Tons	CAM/WB	-	-	-	-	-	\$ -	0%
Heat Pump Split System	Cap-Tons	CAM/WB	-	-	-	-	-	\$ -	0%
New: Packaged Air Conditioner	Cap-Tons	CAM/WB	-	-	-	-	-	\$ -	0%
Package Terminal A/C	Cap-Tons	CAM/WB	-	-	-	-	-	\$ -	0%
Package Terminal Heat Pump	Cap-Tons	CAM/WB	-	-	-	-	-	\$ -	0%
Furnace Replacement	Cap-kBtu/h	CAM/WB	-	-	-	-	-	\$ -	0%
Space Heating Boiler	Cap-kBtu/h	CAM/WB	-	-	-	-	-	\$ -	0%
Smart Thermostats	Each	In-Unit	80	-	-	-	-	\$ 11,465	6%
Furnace Repair/Replacement	Each	In-Unit	-	-	-	-	-	\$ -	0%
Central A/C Replacement	Each	In-Unit	-	-	-	-	-	\$ -	0%
High Efficiency Forced Air Unit (HE FAU)	Each	In-Unit	-	-	-	-	-	\$ -	0%
Portable A/C	Each	In-Unit	-	-	-	-	-	\$ -	0%
Central A/C Tune up	Each	In-Unit	-	-	-	-	-	\$ -	0%
Blower Motor Retrofit	Each	CAM/WB	-	-	-	-	-	\$ -	0%
Efficient Fan Controller	Each	In-Unit	39	-	7	0.01	0.16	\$ 3	0%
Lighting									
Interior LED Lighting	Each	In-Unit	344	-	5,662	0.63	(107.98)	\$ 1,508	1%
Interior TLED Type A Lamps	Each	In-Unit	769	-	4,668	0.51	(87.52)	\$ 4,283	2%
Interior TLED Type C Lamps	Each	CAM/WB	-	-	-	-	-	\$ -	0%
New: LED T8 Lamp - Interior	Each	CAM/WB	-	-	-	-	-	\$ -	0%
New: LED T8 Lamp - Exterior	Each	CAM/WB	-	-	-	-	-	\$ -	0%
Interior LED Fixture	Each	CAM/WB	-	-	-	-	-	\$ -	0%
Interior LED Screw-in	Each	CAM/WB	-	-	-	-	-	\$ -	0%
Interior LED Exit Sign	Each	CAM/WB	-	-	-	-	-	\$ -	0%
Exterior LED Lighting	Each	CAM/WB	-	-	-	-	-	\$ -	0%
New: LED Parking Garage Fixtures	Each	CAM/WB	-	-	-	-	-	\$ -	0%
LED Exterior Wall or Pole Mounted Fixture	Each	CAM/WB	-	-	-	-	-	\$ -	0%
LED Corn Lamp for Exterior Wall or Pole Mounted	Each	CAM/WB	-	-	-	-	-	\$ -	0%
Exterior LED Lighting - Pool	Each	CAM/WB	-	-	-	-	-	\$ -	0%
Wall or Ceiling Mounted Occupancy Sensor	Each	CAM/WB	-	-	-	-	-	\$ -	0%
LED Diffuse A-Lamps	Each	In-Unit	-	-	-	-	-	\$ -	0%
LED Reflector Bulbs	Each	In-Unit	-	-	-	-	-	\$ -	0%
Miscellaneous									
Tier-2 Smart Power Strip	Each	In-Unit	842	-	162,660	2.29	(0.26)	\$ 32,878	17%
Variable Speed Pool Pump	Each	CAM/WB	-	-	-	-	-	\$ -	0%
Smart Power Strip Tier II	Each	CAM/WB	-	-	-	-	-	\$ -	0%
Cold Storage	Each	In-Unit	-	-	-	-	-	\$ -	0%
Air Purifier	Home	In-Unit	-	-	-	-	-	\$ -	0%
CO and Smoke Alarm	Each	In-Unit	244	-	-	-	-	\$ 5,766	3%
CO and Smoke Alarm	Each	CAM/WB	-	-	-	-	-	\$ -	0%
Minor Repair	Each	In-Unit	1,718	-	-	-	-	\$ 24,712	13%

Energy Savings Assistance Program Table 2A - Multifamily Whole Building (MFWB)
Southern California Edison
Through August 2024

Electrification									
New - Central Heat Pump-FS (propane or gas space)	Each	In-Unit	-	-	-	-	\$ -	0%	
Heat Pump Clothes Dryer - FS	Each	In-Unit	-	-	-	-	\$ -	0%	
Induction Cooktop - FS	Each	In-Unit	-	-	-	-	\$ -	0%	
Ductless Mini-split Heat Pump - FS	Each	In-Unit	-	-	-	-	\$ -	0%	
Heat Pump Water Heater - FS	Each	In-Unit	-	-	-	-	\$ -	0%	
Heat Pump Pool Heater - FS	Each	CAM/WB	-	-	-	-	\$ -	0%	
Ductless Mini Split - FS	Each	CAM/WB	-	-	-	-	\$ -	0%	
Heat Pump Water Heater - FS	Each	CAM/WB	-	-	-	-	\$ -	0%	
Customer Enrollment - In Unit									
ESA Outreach & Assessment	Household	In-Unit	538				\$ 67,738	35%	
ESA In-Home Energy Education	Household	In-Unit	538				\$ 10,933	6%	
Ancillary Services									
Audit							\$ -	0%	
Total			6,634	-	177,437	4.06	939.51	\$ 193,027	100%

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated ^[1]	0
Subtotal of Master-metered Multifamily Properties Treated	0
Total Number of Multifamily Tenant Units w/in Properties Treated ^[2]	0
Total Number of buildings w/in Properties Treated	0

Multifamily Properties Treated (In-Unit)	Number
Total Number of households individually treated (in-unit)	538

ESA Program - MFWB	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ 185,478		\$ 185,478
Direct Implementation (Non-Incentive)	\$ 567,775		\$ 567,775
Direct Implementation	\$ 193,027		\$ 193,027
SPOC	\$ 87,652		\$ 87,652
TOTAL MFWB COSTS	\$ 1,033,932	\$ -	\$ 1,033,932

<<Includes measures costs

^[1] Multifamily properties are sites with at least five (5) or more dwelling units. The properties may have multiple buildings.

^[2] 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.

^[3] Measure type column added to identify if a measure is for in-unit or common area/whole building because they use different workpaper savings.

NOTES:

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

Energy Savings Assistance Program Table 2B - ESA Whole Home (Pilot Plus and Pilot Deep)
Southern California Edison
Through August 2024

Measures	Units	ESA Program - Pilot Plus						Measures	Units	ESA Program - Pilot Deep					
		Year-To-Date Completed & Expensed Installation								Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure			Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances							Appliances								
Energy Star Chest Freezer: 14-18 cf	Each						0%	Energy Star Chest Freezer: 14-18 cf	Each						0%
Energy Star Chest Freezer: 20-22 cf	Each						0%	Energy Star Chest Freezer: 20-22 cf	Each						0%
Energy Star Chest Freezer: 5-9 cf	Each						0%	Energy Star Chest Freezer: 5-9 cf	Each						0%
Energy Star Qualified Clothes Washer	Each	2	84	0.02	20.80	\$ 2,180	2%	Energy Star Qualified Clothes Washer	Each	2	16	0.00	15.69	\$ 2,180	1%
HP Washer/Dryer Combo Unit	Each						0%	HP Washer/Dryer Combo Unit	Each						0%
Energy Star Qualified Dishwashers	Each						0%	Energy Star Qualified Dishwashers	Each	2	45	0.01	1.35	\$ 2,070	1%
Energy Star Qualified Refrigerators - Large 20+ cf	Each	2	95	0.00	-0.80	\$ 2,730	3%	Energy Star Qualified Refrigerators - Large 20+ cf	Each	1	47	0.00	-0.66	\$ 1,365	1%
Energy Star Qualified Refrigerators - Medium 17 - 19 cf	Each						0%	Energy Star Qualified Refrigerators - Medium 17 - 19 cf	Each						0%
Energy Star Qualified Refrigerators - Small 14-16 cf	Each						0%	Energy Star Qualified Refrigerators - Small 14-16 cf	Each						0%
Energy Star Upright Freezer: 13.5-15 cf	Each						0%	Energy Star Upright Freezer: 13.5-15 cf	Each						0%
Energy Star Upright Freezer: 16-18 cf	Each						0%	Energy Star Upright Freezer: 16-18 cf	Each						0%
Energy Star Upright Freezer: 20-22 cf	Each						0%	Energy Star Upright Freezer: 20-22 cf	Each						0%
Cooling Measures							Cooling Measures								
Energy Star Qualified Ceiling Fans	Each						0%	Energy Star Qualified Ceiling Fans	Each	2	117	0.01	-1.89	\$ 568	0%
Whole House Fan	Each						0%	Whole House Fan	Each	2	358	0.19	-0.89	\$ 5,600	4%
Evaporative cooler installation 3,000 CFM	Each						0%	Evaporative cooler installation 3,000 CFM	Each						0%
Evaporative cooler installation 4,000 CFM	Each						0%	Evaporative cooler installation 4,000 CFM	Each						0%
Evaporative cooler installation 5,000 CFM	Each						0%	Evaporative cooler installation 5,000 CFM	Each						0%
Replace Room AC with Energy Star Qualified RAC - 10k BTU	Each						0%	Replace Room AC with Energy Star Qualified RAC - 10k BTU	Each						0%
Replace Room AC with Energy Star Qualified RAC - 12k BTU	Each						0%	Replace Room AC with Energy Star Qualified RAC - 12k BTU	Each						0%
Replace Room AC with Energy Star Qualified RAC - 15k BTU	Each						0%	Replace Room AC with Energy Star Qualified RAC - 15k BTU	Each						0%
Replace Room AC with Energy Star Qualified RAC - 6-8k BTU	Each						0%	Replace Room AC with Energy Star Qualified RAC - 6-8k BTU	Each						0%
Domestic Hot Water							Domestic Hot Water								
Faucet Aerator	Each						0%	Faucet Aerator	Each	6	41	0.00	33.62	\$ 54	0%
Low-Flow Showerhead - Handheld	Each	5	517	0.09	29.76	\$ 164	0%	Low-Flow Showerhead - Handheld	Each	3	514	0.10	9.82	\$ 123	0%
Low-Flow Showerhead - Regular	Each	1	12	0.00	9.96	\$ 24	0%	Low-Flow Showerhead - Regular	Each	1	3	0.00	2.79	\$ 24	0%
Energy Star HE Gas Storage Water Heater - 40G	Each						0%	Energy Star HE Gas Storage Water Heater - 40G	Each	2	0	0.00	55.60	\$ 5,080	3%
Energy Star HE Gas Storage Water Heater - 50G	Each						0%	Energy Star HE Gas Storage Water Heater - 50G	Each	1	0	0.00	74.00	\$ 3,095	2%
Replace existing electric W/H with HP Water Heater - 40G	Each						0%	Replace existing electric W/H with HP Water Heater - 40G	Each						0%
Replace existing electric W/H with HP Water Heater - 50G	Each						0%	Replace existing electric W/H with HP Water Heater - 50G	Each						0%
Replace existing electric W/H with HP Water Heater - 80G	Each						0%	Replace existing electric W/H with HP Water Heater - 80G	Each						0%
Replace with Solar Water Heating w/storage back up	Each						0%	Replace with Solar Water Heating w/storage back up	Each						0%
Replace with Solar Water Heating w/tankless back up	Each						0%	Replace with Solar Water Heating w/tankless back up	Each						0%
Replace with Tankless Water Heater	Each						0%	Replace with Tankless Water Heater	Each						0%
Thermostatic Shower Valve	Each	4	576	0.11	22.60	\$ 204	0%	Thermostatic Shower Valve	Each	7	1,148	0.22	22.70	\$ 365	0%
Thermostatic Tub Spout/Diverter	Each						0%	Thermostatic Tub Spout/Diverter	Each						0%
Water Heater - Repair water leak - NTE \$300	T&M						0%	Water Heater - Repair water leak - NTE \$300	T&M						0%
Water Heater Blanket	Each						0%	Water Heater Blanket	Each						0%
Water Heater Pipe Insulation	Each	5	0	0.00	6.29	\$ 125	0%	Water Heater Pipe Insulation	Each	2	0	0.00	0.00	\$ 50	0%
Enclosure							Enclosure								
Attic Cover Replacement	Each						0%	Attic Cover Replacement	Each	2	0	0.00	0.00	\$ 175	0%
Attic Insulation, Add R-11	Per Square Foot	528	32	0.07	9.40	\$ 977	1%	Attic Insulation, Add R-11	Per Square Foot						0%
Attic Insulation, Add R-19	Per Square Foot	1,760	141	0.30	39.78	\$ 3,344	4%	Attic Insulation, Add R-19	Per Square Foot						0%
Attic Insulation, Add R-30	Per Square Foot	1,248	125	0.26	33.07	\$ 2,434	3%	Attic Insulation, Add R-30	Per Square Foot	3,601	373	0.60	88.75	\$ 7,022	5%
Attic Insulation, Add R-38	Per Square Foot						0%	Attic Insulation, Add R-38	Per Square Foot	2,611	304	0.69	98.28	\$ 5,222	4%
Attic Insulation, Add R-49	Per Square Foot						0%	Attic Insulation, Add R-49	Per Square Foot	2,785	210	0.21	75.06	\$ 5,848	4%
Caulking	Per Linear Foot	10	0	0.00	0.00	\$ 13	0%	Caulking	Per Linear Foot	39	0	0.00	0.00	\$ 174	0%
Cover Plate Gaskets	Per Home	10	0	0.00	0.00	\$ 175	0%	Cover Plate Gaskets	Per Home	26	0	0.00	0.00	\$ 408	0%
Duct Sealing - 120 Minutes	Per System	1	0	0.00	0.05	\$ 730	1%	Duct Sealing - 120 Minutes	Per System	2	0	0.00	0.00	\$ 383	0%
Duct Sealing - 60 Minutes	Per System	1	0	0.00	0.00	\$ 260	0%	Duct Sealing - 60 Minutes	Per System						0%
Duct Sealing - 90 Minutes	Per System						0%	Duct Sealing - 90 Minutes	Per System						0%
Floor Insulation, Add R-19	Per Square Foot						0%	Floor Insulation, Add R-19	Per Square Foot	4,094	0	0.00	0.00	\$ 11,873	8%
Glass Replacement	Per Square Foot						0%	Glass Replacement	Per Square Foot						0%
High Efficiency Windows	Per Square Foot						0%	High Efficiency Windows	Per Square Foot	272	0	0.00	0.00	\$ 14,248	10%
High-Performance Cool Roofs	Per Square Foot						0%	High-Performance Cool Roofs	Per Square Foot						0%
Insulated Exterior Doors	Per Door						0%	Insulated Exterior Doors	Per Door						0%
Kitchen Exhaust Dampers	Each						0%	Kitchen Exhaust Dampers	Each	5	0	0.00	0.00	\$ 925	1%
Minor Home / Envelop Repairs - NTE \$600	T&M	3	0	0.00	0.00	\$ 1,335	1%	Minor Home / Envelop Repairs - NTE \$600	T&M						0%
Prescriptive Duct Sealing (No HVAC Replacement)	Per System						0%	Prescriptive Duct Sealing (No HVAC Replacement)	Per System	1	0	0.00	0.00	\$ 335	0%
Radiant Barriers	Per Square Foot						0%	Radiant Barriers	Per Square Foot						0%
Room AC/Evaporative Cooler Cover	Each						0%	Room AC/Evaporative Cooler Cover	Each						0%
Wall Insulation, Add R-13	Per Square Foot						0%	Wall Insulation, Add R-13	Per Square Foot	1,893	0	0.00	0.00	\$ 7,610	5%
Weather-stripping	Per Linear Foot	169	0	0.00	0.00	\$ 913	1%	Weather-stripping	Per Linear Foot	311	0	0.00	0.00	\$ 1,679	1%
Window Film (Tint)	Per Square Foot						0%	Window Film (Tint)	Per Square Foot						0%
HVAC							HVAC								
Duct Insulation (R-6)	Per Linear Foot						0%	Duct Insulation (R-6)	Per Linear Foot						0%
Duct Repair	Each						0%	Duct Repair	Each	35	0	0.00	0.00	\$ 1,050	1%
Duct Replacement	Per Linear Foot						0%	Duct Replacement	Per Linear Foot						0%
Duct Test - Title 24 or to perform duct sealing	Per System	6	0	0.00	0.00	\$ 840	1%	Duct Test - Title 24 or to perform duct sealing	Per System	7	0	0.00	0.00	\$ 980	1%
ECM Blower Motor	Each						0%	ECM Blower Motor	Each						0%
Efficient Fan Controller	Each	1	0	0.00	0.00	\$ 260	0%	Efficient Fan Controller	Each						0%
HE Wall Furnace 82% AFUE	Each						0%	HE Wall Furnace 82% AFUE	Each	1	0	0.00	8.89	\$ 4,640	3%

Energy Savings Assistance Program Table 2B - ESA Whole Home (Pilot Plus and Pilot Deep)
Southern California Edison
Through August 2024

HVAC System - Filter Replacement (No HVAC Replacement)	Each	1	8	0.00	0.00	\$	62	0%
HVAC Tune-up	Each	1	18	-0.02	0.00	\$	205	0%
Mobile Home Split System, 2 TON 16 SEER/60 KBTU 95% AFUE	Each							0%
Mobile Home Split System, 2 TON 16 SEER/75 KBTU 95% AFUE	Each							0%
Mobile Home Split System, 3 TON 16 SEER/60 KBTU 95% AFUE	Each							0%
Mobile Home Split System, 3 TON 16 SEER/75 KBTU 95% AFUE	Each							0%
Mobile Home Split System, 4 TON 16 SEER/72 KBTU 95% AFUE	Each							0%
Replace FAU with HE FAU, 100 KBTU 95% AFUE	Each							0%
Replace FAU with HE FAU, 40 KBTU 95% AFUE	Each							0%
Replace FAU with HE FAU, 60 KBTU 95% AFUE	Each							0%
Replace FAU with HE FAU, 80 KBTU 95% AFUE	Each							0%
Replace Package G/E with 16+ SEER/80%+ AFUE - 2 1/2 Ton	Each							0%
Replace Package G/E with 16+ SEER/80%+ AFUE - 2 Ton	Each							0%
Replace Package G/E with 16+ SEER/80%+ AFUE - 3 1/2 Ton	Each							0%
Replace Package G/E with 16+ SEER/80%+ AFUE - 3 Ton	Each							0%
Replace Package G/E with 16+ SEER/80%+ AFUE - 4 Ton	Each							0%
Replace Package G/E with 16+ SEER/80%+ AFUE - 5 Ton	Each							0%
Replace Package HP with 16+ SEER/8.5+ HSPF - 2 1/2 Ton	Each							0%
Replace Package HP with 16+ SEER/8.5+ HSPF - 2 Ton	Each							0%
Replace Package HP with 16+ SEER/8.5+ HSPF - 3 1/2 Ton	Each							0%
Replace Package HP with 16+ SEER/8.5+ HSPF - 3 Ton	Each							0%
Replace Package HP with 16+ SEER/8.5+ HSPF - 4 Ton	Each							0%
Replace Package HP with 16+ SEER/8.5+ HSPF - 5 Ton	Each							0%
Replace Split AC Only with 16+ SEER - 2 1/2 Ton	Each							0%
Replace Split AC Only with 16+ SEER - 2 Ton	Each							0%
Replace Split AC Only with 16+ SEER - 3 1/2 Ton	Each							0%
Replace Split AC Only with 16+ SEER - 3 Ton	Each							0%
Replace Split AC Only with 16+ SEER - 4 Ton	Each	1	460	0.00	-2.04	\$	5,905	7%
Replace Split AC Only with 16+ SEER - 5 Ton	Each							0%
Replace Split HP System with 16+ SEER/8.8+ HSPF - 2 1/2 Ton	Each							0%
Replace Split HP System with 16+ SEER/8.8+ HSPF - 2 Ton	Each							0%
Replace Split HP System with 16+ SEER/8.8+ HSPF - 3 1/2 Ton	Each							0%
Replace Split HP System with 16+ SEER/8.8+ HSPF - 3 Ton	Each							0%
Replace Split HP System with 16+ SEER/8.8+ HSPF - 4 Ton	Each							0%
Replace Split HP System with 16+ SEER/8.8+ HSPF - 5 Ton	Each							0%
Replace Split System with 16+ SEER/95%+ AFUE - 2 1/2 Ton	Each							0%
Replace Split System with 16+ SEER/95%+ AFUE - 2 Ton	Each							0%
Replace Split System with 16+ SEER/95%+ AFUE - 3 1/2 Ton ⁽¹⁾	Each	2	805	224.73	17.96	\$	17,790	20%
Replace Split System with 16+ SEER/95%+ AFUE - 3 Ton ⁽¹⁾	Each	4	1410	601.33	451.41	\$	33,120	37%
Replace Split System with 16+ SEER/95%+ AFUE - 4 Ton	Each	1	500	0.53	12.48	\$	9,190	10%
Replace Split System with 16+ SEER/95%+ AFUE - 5 Ton ⁽¹⁾	Each							0%
Smart Thermostat	Each	2	314	0.00	20.00	\$	440	0%
Maintenance								
CO/Smoke Alarm Combo	Each	7	0	0.00	0.00	\$	553	1%
Comprehensive Home Health and Safety Check-up	Per Home	4	0	0.00	0.00	\$	300	0%
Furnace Clean and Tune	Each							0%
Range Hood	Each							0%
Smoke Alarm	Each	17	0	0.00	0.00	\$	833	1%
Lighting								
Exterior LED Security Light (photocell and motion sensor)	Each							0%
LED Fixtures - Exterior	Each	4	57	0.00	0.00	\$	424	0%
LED Fixtures - Interior	Each	2	121	0.02	-2.44	\$	212	0%
LED Lamps - 40w Equivalent	Each	32	649	0.08	-6.47	\$	384	0%
LED Lamps - 60w Equivalent	Each							0%
Miscellaneous								
Energy Star Qualified Variable Speed Pool pumps	Each							0%
Home Energy Monitor	Each							0%
Tier 2 Smart Power Strips	Each	2	280	0.07	6.00	\$	190	0%
Vacancy Sensors	Each							0%
Permitting Fees								
Permits	Each	6				\$	2,146	2%
Customer Enrollment								
ESA WH Outreach & Assessment	Home	8				\$	1,120	1%
ESA WH In-Home Energy Education	Home							0%
Total Savings/Expenditures			6,204	827.58	667.79	\$	89,581	100%

Households Treated	Total
- Single Family Households Treated	8
- Mobile Homes Treated	-
Total Number of Households Treated	8

HVAC System - Filter Replacement (No HVAC Replacement)	Each	3	25	0.01	0.00	\$	186	0%
HVAC Tune-up	Each	4	107	0.05	0.00	\$	840	1%
Mobile Home Split System, 2 TON 16 SEER/60 KBTU 95% AFUE	Each							0%
Mobile Home Split System, 2 TON 16 SEER/75 KBTU 95% AFUE	Each							0%
Mobile Home Split System, 3 TON 16 SEER/60 KBTU 95% AFUE	Each							0%
Mobile Home Split System, 3 TON 16 SEER/75 KBTU 95% AFUE	Each							0%
Mobile Home Split System, 4 TON 16 SEER/72 KBTU 95% AFUE	Each							0%
Replace FAU with HE FAU, 100 KBTU 95% AFUE	Each							0%
Replace FAU with HE FAU, 40 KBTU 95% AFUE	Each							0%
Replace FAU with HE FAU, 60 KBTU 95% AFUE	Each							0%
Replace FAU with HE FAU, 80 KBTU 95% AFUE	Each							0%
Replace Package G/E with 16+ SEER/80%+ AFUE - 2 1/2 Ton	Each							0%
Replace Package G/E with 16+ SEER/80%+ AFUE - 2 Ton	Each							0%
Replace Package G/E with 16+ SEER/80%+ AFUE - 3 1/2 Ton	Each							0%
Replace Package G/E with 16+ SEER/80%+ AFUE - 3 Ton	Each							0%
Replace Package G/E with 16+ SEER/80%+ AFUE - 4 Ton	Each	1	370	0.44	-1.58	\$	10,280	7%
Replace Package G/E with 16+ SEER/80%+ AFUE - 5 Ton	Each							0%
Replace Package HP with 16+ SEER/8.5+ HSPF - 2 1/2 Ton	Each							0%
Replace Package HP with 16+ SEER/8.5+ HSPF - 2 Ton	Each							0%
Replace Package HP with 16+ SEER/8.5+ HSPF - 3 1/2 Ton	Each							0%
Replace Package HP with 16+ SEER/8.5+ HSPF - 3 Ton	Each							0%
Replace Package HP with 16+ SEER/8.5+ HSPF - 4 Ton	Each							0%
Replace Package HP with 16+ SEER/8.5+ HSPF - 5 Ton	Each							0%
Replace Split AC Only with 16+ SEER - 2 1/2 Ton	Each							0%
Replace Split AC Only with 16+ SEER - 2 Ton	Each							0%
Replace Split AC Only with 16+ SEER - 3 1/2 Ton	Each							0%
Replace Split AC Only with 16+ SEER - 3 Ton	Each							0%
Replace Split AC Only with 16+ SEER - 4 Ton	Each							0%
Replace Split AC Only with 16+ SEER - 5 Ton	Each	1	575	0.52	-2.55	\$	6,370	4%
Replace Split HP System with 16+ SEER/8.8+ HSPF - 2 1/2 Ton	Each							0%
Replace Split HP System with 16+ SEER/8.8+ HSPF - 2 Ton	Each							0%
Replace Split HP System with 16+ SEER/8.8+ HSPF - 3 1/2 Ton	Each							0%
Replace Split HP System with 16+ SEER/8.8+ HSPF - 3 Ton	Each							0%
Replace Split HP System with 16+ SEER/8.8+ HSPF - 4 Ton	Each							0%
Replace Split HP System with 16+ SEER/8.8+ HSPF - 5 Ton	Each							0%
Replace Split System with 16+ SEER/95%+ AFUE - 2 1/2 Ton	Each							0%
Replace Split System with 16+ SEER/95%+ AFUE - 2 Ton	Each							0%
Replace Split System with 16+ SEER/95%+ AFUE - 3 1/2 Ton	Each	3	1,474	883.20	29.30	\$	26,980	18%
Replace Split System with 16+ SEER/95%+ AFUE - 3 Ton	Each							0%
Replace Split System with 16+ SEER/95%+ AFUE - 4 Ton	Each							0%
Replace Split System with 16+ SEER/95%+ AFUE - 5 Ton	Each	1	575	320.52	13.45	\$	9,380	6%
Smart Thermostat	Each	6	1,250	0.00	67.00	\$	1,320	1%
Maintenance								
CO/Smoke Alarm Combo	Each	11	0	0.00	0.00	\$	869	1%
Comprehensive Home Health and Safety Check-up	Per Home	5	0	0.00	0.00	\$	375	0%
Furnace Clean and Tune	Each	4	0	0.00	0.00	\$	280	0%
Range Hood	Each	3	0	0.00	0.00	\$	1,140	1%
Smoke Alarm	Each	18	0	0.00	0.00	\$	882	1%
Lighting								
Exterior LED Security Light (photocell and motion sensor)	Each	5	104	0.00	0.00	\$	232	0%
LED Fixtures - Exterior	Each							0%
LED Fixtures - Interior	Each							0%
LED Lamps - 40w Equivalent	Each	35	703	0.09	-13.65	\$	396	0%
LED Lamps - 60w Equivalent	Each	45	407	0.05	-7.76	\$	540	0%
Miscellaneous								
Energy Star Qualified Variable Speed Pool pumps	Each							0%
Home Energy Monitor	Each							0%
Tier 2 Smart Power Strips	Each							0%
Vacancy Sensors	Each							0%
Permitting Fees								
Permits	Each	9	0	0.00	0.00	\$	2,367	2%
Customer Enrollment								
ESA WH Outreach & Assessment	Home	10				\$	1,400	1%
ESA WH In-Home Energy Education	Home							0%
Total Savings/Expenditures			8,767	1,206.91	567.31	\$	146,982	100%

Households Treated	Total
- Single Family Households Treated	10
- Mobile Homes Treated	-
Total Number of Households Treated	10

Energy Savings Assistance Program Table 2B - ESA Whole Home (Pilot Plus and Pilot Deep)
Southern California Edison
Through August 2024

ESA Program - Pilot Plus and Pilot Deep	Year to Date Expenses		
	Electric	Gas	Total
Administration ⁽¹⁾	\$ 148,133	\$ 98,865	\$ 246,998
Direct Implementation (Non-Incentive) ⁽²⁾	\$ 174,819	\$ 174,819	\$ 349,638
Direct Implementation ⁽³⁾	\$ 54,241	\$ 52,072	\$ 106,313
TOTAL Pilot Plus and Pilot Deep COSTS	\$ 377,193	\$ 325,756	\$ 702,948

<<Includes measures costs

ESA Program - Pilot Plus and Pilot Deep	Year to Date Expenses		
	Electric	Gas	Total
Inspections	\$ 742	\$ 742	\$ 1,484
Marketing and Outreach	\$ 39,444	\$ 39,444	\$ 78,888
General Administration	\$ 57,685	\$ 8,417	\$ 66,102
Direct Implementer -- ADMIN	\$ 174,819	\$ 174,819	\$ 349,638
EM&V Studies	\$ 44,768	\$ 44,768	\$ 89,535
Direct Installation -- Materials	\$ 21,934	\$ 19,958	\$ 41,892
Performance Incentive	\$ 17,196	\$ 15,880	\$ 33,076
Home Audit; Test-In Test-Out	\$ 13,317	\$ 14,181	\$ 27,497
Remediation & Mitigation	\$ 1,794	\$ 2,054	\$ 3,847
WE&T	\$ 5,494	\$ 5,494	\$ 10,988
Total	\$ 377,193	\$ 325,756	\$ 702,948

⁽¹⁾ Administration includes expenses from the following categories: General Administration, Regulatory Compliance, Training, Inspections, Marketing and Outreach, and Evaluation.

⁽²⁾ Direct Implementation (Non-Incentive) includes expenses for Implementer Administration and Marketing.

⁽³⁾ Direct Implementation includes expenses for measures delivery.

⁽⁴⁾ Maroma is currently reviewing its kW savings for certain measures. Savings will be updated next month, if needed.

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

**Energy Savings Assistance Program Table 2C - Building Electrification (BE) Pilot
Southern California Edison
Through August 2024**

Measures	Units	ESA Program - Building Electrification Retrofit Pilot ^[1]					
		Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh (Annual) ^[2]	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances							
Electric Dryer	Each	32	(9,757)	-	484	\$ 41,520	3.2%
Heat Pump Dryer	Each	1	(245)	-	13	\$ 2,120	0.2%
Induction Cooktop	Each	3	(270)	-	17	\$ 5,320	0.4%
Induction Range	Each	21	(4,347)	-	300	\$ 43,932	3.3%
Domestic Hot Water							
Heat Pump Water Heater	Each	63	(77,260)	-	10,367	\$ 330,670	25.1%
Enclosure							
Attic Insulation	Home	1	38	-	-	\$ 1,978	0.2%
HVAC							
Heat Pump HVAC	Each	69	(80,577)	-	14,056	\$ 829,861	63.1%
Duct Seal	Each	41	-	-	-	\$ 15,580	1.2%
Smart Thermostat	Each	15	751	-	-	\$ 4,200	0.3%
Miscellaneous^[3]							
Minor Home Repair	Home	-	-	-	-	\$ -	0.0%
Carbon Monoxide/Smoke Alarm	Each	213	-	-	-	\$ 17,607	1.3%
Electric Panel	Each	-	-	-	-	\$ -	0.0%
Electric Sub-Panel	Each	-	-	-	-	\$ -	0.0%
Electrical Circuit Run	Each	-	-	-	-	\$ -	0.0%
Induction Cookware	Home	20	-	-	-	\$ 3,000	0.2%
Customer Enrollment							
Energy Assessment	Home	64	-	-	-	\$ 19,200	1.5%
Total Savings/Expenditures							
			(171,667)	-	25,237	\$ 1,314,988	100%
Claimable kWh Savings^[4]			567,777				

Households Treated		Total
Single Family Households Treated	Home	64
Estimated Avg. Annual Bill Savings Treated ^[5]	Home	\$ 853

ESA Program - Building Electrification	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ 170,784		\$ 170,784
Direct Implementation (Non-Incentive) ^[6]	\$ 105,507		\$ 105,507
Direct Implementation ^[7]	\$ 1,024,516		\$ 1,024,516
TOTAL Building Electrification COSTS	\$ 1,300,806	\$ -	\$ 1,300,806

<<Includes measures 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] The BE Pilot has reviewed all fuel-substitution measures and updated the data with the negative kWh value.

^[3] 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.

^[4] Claimable kWh Savings was calculated using methodology in Fuel Substitution Technical Guidance Document in accordance to D.19-08-009; Claimable kWh = kWh + (Therm * 29.3).

^[5] Estimated average annual bill savings is calculated prior to participation. The estimated annual bill savings is based on existing equipment in the home, electric and gas utility rates, and usage. The bill savings analysis is based on the assumption that heating, cooling and hot water usage will remain the same in the future and using a Time-Of-Use plan (e.g., TOU-D-PRIME) that best fits the home.

^[6] Includes Marketing & Outreach, Processing, and Inspection costs.

^[7] Direct Implementation Year to Date (YTD) Expenses will have a monthly lag of recorded expenditures and not match the expenditures in Cell G31. The YTD expenditures include an accrual reconciliation to reflect actual expenditures of the 2024 reported homes treated and installed measures.

**Energy Savings Assistance Program Table 2D - Clean Energy Homes New Construction Pilot
Southern California Edison
Through August 2024**

ESA CEH Program Offerings	Units	ESA Program - Clean Energy Homes New Construction Pilot ^[1]					Estimated Incentive Expenses (\$)	% Incentive Budget
		Monthly Total (Projects)	Monthly Total Units (Living Units)	Cumulative Program Launch-to-date Total (Projects) ^[2]	Cumulative Program Launch-to-date Total Units (Living Units) ^[2]			
Interest Form submitted	Homes	7	386	19	917			
Interest Form denied	Homes	1	73	3	103			
Application for direct design assistance (in progress)	Homes					\$ -		
Applications for design incentive (in progress)	Homes	1	64	3	80	\$150,000*	5%	
Application for direct design assistance (completed)	Homes					\$ -		
Applications for design incentive (completed)	Homes					\$ -		
Applications for tenant education incentive (in progress)	Homes					\$ -		
Applications for tenant education incentive (completed)	Homes					\$ -		
Total Savings/Expenditures						\$ -	5%	

^[1] CEH does not track installations since it is a Design Assistance and Tenant Education Incentive Program. CEH tracks Interest Forms (Interest in the Program).

^[2] Interest Forms include a count of those customers interested in General Technical Assistance: AEA provides general education and guidance. Those participants who submit a formal application to participate in the program will do so under with direct design or a design incentive. Direct Design: AEA provides direct design assistance for all-electric builds. Design Incentive: Participant submitted an application for a design incentive. The one application received for August 2024 has 3 projects so the expenses remained the same as the previous month and one form was denied in August 2024.

*The (\$) amount for the three projects is \$50K for each project incentive. Totaling to \$150k total. In July, the dollar amount was the same but should have been \$100K.

NOTE: Columns reflect cumulative total numbers instead of YTD total, as previously reported.

ESA CEH Outreach and Education	Units	Monthly Total	YTD Total
Webinars	Number of webinars	0	2
Active leads	Unique developer	7	34*

*These numbers are not cumulative. The YTD Total may decrease from month to month because leads are dropped due to ineligibility, noninterest, or non-responsiveness.

Design Assistance Completed Applications	Units	Quantity	Compliance Margin Designed kWh (Annual)*	Compliance Margin Designed BTU (Annual)*	Avoided CO2 Emissions	Estimated Incentive Expenses (\$)	% Incentive Budget
Direct Design Assistance	Living Units	0				\$ -	0.00%
Design Incentive	Living Units	0				\$ -	0.00%
Total Savings/Expenditures						\$ -	0.00%

*The first DA application was submitted in July 2024. As noted above, there is 1 design incentive application in process but has not been completed, meaning submitted, reviewed and incentive paid.

ESA Program - Clean Energy Homes	Year to Date Expenses			Total
	Electric	Gas		
Administration	\$ 79,697	\$ -		\$ 79,697
Direct Implementation (Non-Incentive)	\$ 332,059	\$ -		\$ 332,059
Direct Implementation	\$ -	\$ -		\$ -
TOTAL Clean Energy Homes COSTS	\$ 411,756	\$ -		\$ 411,756

<<Includes measures costs

**Energy Savings Assistance Program Table 2E - CSD Leveraging
Southern California Edison
Through August 2024**

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

CSD MF Tenant Units Treated	Total
-	-
-	-

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

**Energy Savings Assistance Program Tables 3A-3H - Energy Savings and
Average Bill Savings per Treated Home/Common Area
Southern California Edison
Through August 2024**

Table 3A, ESA Main Program (SF, MH)	
Annual kWh Savings	12,822,559
Annual Therm Savings	-
Lifecycle kWh Savings	76,281,033
Lifecycle Therm Savings	-
Current kWh Rate ^[1]	\$ 0.21
Current Therm Rate	\$ -
Average 1st Year Bill Savings / Treated households	\$ 101
Average Lifecycle Bill Savings / Treated Household	\$ 600

Table 3B, ESA Program - Multifamily Whole Building (MF In-Unit)	
Annual kWh Savings	177,437
Annual Therm Savings	
Lifecycle kWh Savings	473,507
Lifecycle Therm Savings	
Current kWh Rate ^[1]	\$ 0.21
Current Therm Rate	\$ -
Average 1st Year Bill Savings / Treated Property	\$ 68
Average Lifecycle Bill Savings / Treated Property	\$ 182

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

No data to report as of Aug 2024.

Table 3D, ESA Program - Pilot Plus	
Annual kWh Savings	6,204
Annual Therm Savings	668
Lifecycle kWh Savings	62,041
Lifecycle Therm Savings	6,678
Current kWh Rate ^[1]	\$ 0.21
Current Therm Rate	\$ 1.38
Average 1st Year Bill Savings / Treated Property	\$ 221
Average Lifecycle Bill Savings / Treated Property	\$ 2,206

**Energy Savings Assistance Program Tables 3A-3H - Energy Savings and
Average Bill Savings per Treated Home/Common Area
Southern California Edison
Through August 2024**

Table 3E, ESA Program - Pilot Deep	
Annual kWh Savings	8,767
Annual Therm Savings	567
Lifecycle kWh Savings	87,666
Lifecycle Therm Savings	5,673
Current kWh Rate ^[1]	\$ 0.21
Current Therm Rate	\$ 1.38
Average 1st Year Bill Savings / Treated Property	\$ 260
Average Lifecycle Bill Savings / Treated Property	\$ 2,597

Table 3F, ESA Program - Building Electrification (SCE Only) ^[2]	
Annual kWh Savings	567,777
Annual Therm Savings	-
Lifecycle kWh Savings	7,370,716
Lifecycle Therm Savings	325,555
Current kWh Rate ^[1]	\$ 0.21
Current Therm Rate	\$ -
Average 1st Year Bill Savings / Treated Households	\$ 1,836
Average Lifecycle Bill Savings / Treated Households	\$ 23,838

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

Table 3H, Summary - ESA Program (SF, MH), MFWB, CSD Leveraging, Pilot Plus and Pilot Deep ^[3]	
Annual kWh Savings	13,014,967
Annual Therm Savings	1,235
Lifecycle kWh Savings	76,904,247
Lifecycle Therm Savings	12,351
Current kWh Rate ^[1]	\$ 0.21
Current Therm Rate	\$ -
Average 1st Year Bill Savings / Treated Households	\$ 649
Average Lifecycle Bill Savings / Treated Households	\$ 5,585

^[1] The current kWh rate is the 2024 projected kWh rate listed in the May 1, 2024 Annual Report, ESA Table 9.

^[2] The kWh Savings are based on the Claimable Savings from ESA Table 2C.

^[3] Summary is the sum of ESA Main, MF In Unit, MFWB, Pilot Plus Pilot Deep, CSD Leveraging.

**Energy Savings Assistance Program Table 4A-4E - Homes/Buildings Treated
Southern California Edison
Through August 2024**

Table 4A, ESA Program (SF, MH)						
County	Eligible Households			Households Treated YTD		
	Rural ^[1]	Urban	Total	Rural	Urban	Total
Fresno	0	826	826	0	0	0
Imperial	298	0	298	0	0	0
Inyo	2,095	11	2,106	0	0	0
Kern	19,863	15,756	35,619	360	1	361
Kings	11,276	0	11,276	368	0	368
Los Angeles	3,542	678,712	682,254	199	13,235	13,434
Madera	0	2	2	0	0	0
Mariposa	1	0	0	0	0	0
Mono	3,671	0	3,671	0	0	0
Orange	1	275,838	275,839	0	1,337	1,337
Riverside	121,767	118,244	240,011	445	2,621	3,066
San Bernardino	50,024	236,393	286,417	849	3,937	4,786
San Diego	1	0	1	0	0	0
Santa Barbara	0	24,091	24,091	0	0	0
Tulare	51,069	17,089	68,158	1,339	448	1,787
Ventura	2,962	84,312	87,274	19	1,161	1,180
Total	266,570	1,451,274	1,717,843	3,579	22,740	26,319

Table 4B, ESA Program - MFWB (MF In-Unit)						
County	Eligible Households ^[2]			Households Treated YTD		
				Rural	Urban	Total
Kings				3	0	3
Los Angeles				0	145	145
Orange				0	168	168
Riverside				70	1	71
San Bernardino				0	147	147
Tulare				4	0	4
Total	0	0	0	77	461	538

Table 4C, ESA Program - Multifamily Whole Building (MFCAM)						
County	Eligible Properties ^[2]			Properties Treated YTD		
	Rural ^[1]	Urban	Total	Rural	Urban	Total
Kings				0	0	0
Los Angeles				0	0	0
Orange				0	0	0
Riverside				0	0	0
San Bernardino				0	0	0
Tulare				0	0	0
Total	0	0	0	0	0	0

No data to report as of August 2024.

Table 4D, ESA Program - Pilot Plus and Pilot Deep						
County	Eligible Households			Households Treated YTD		
	Rural ^[1]	Urban	Total	Rural	Urban	Total
Los Angeles	131	8,847	8,978	2	7	9
Riverside	1,576	3,564	5,140	7	1	8
San Bernardino	42	3,566	3,608	1	-	1
Total	1,749	15,977	17,726	10	8	18

Table 4E, ESA Program - CSD Leveraging						
County	Eligible Households			Households Treated YTD		
	-	-	-	-	-	-
Total	-	-	-	0	0	0

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

^[2] Do not currently have Eligible Households/Properties for MFWB.

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

**Energy Savings Assistance Program Table 5A - 5F - Energy Savings Assistance Program Customer Summary
Southern California Edison
Through August 2024**

Table 5A, ESA Main Program (SF, MH)																
Month	Gas & Electric				Gas Only				Electric Only				Total			
	# of Household Treated by	(Annual)			# of Household Treated by	(Annual)			# of Household Treated by	(Annual)			# of Household Treated by	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January									1,138	-	666,160	165	1,138	-	666,160	165
February									1,283	-	757,277	166	1,283	-	757,277	166
March									3,598	-	1,733,496	285	3,598	-	1,733,496	285
April									3,946	-	1,953,691	386	3,946	-	1,953,691	386
May									3,816	-	1,950,114	348	3,816	-	1,950,114	348
June									4,016	-	1,884,639	368	4,016	-	1,884,639	368
July									4,799	-	2,093,086	398	4,799	-	2,093,086	398
August									3,723	-	1,784,096	300	3,723	-	1,784,096	300
September																
October																
November																
December																
YTD									26,319		12,822,559	2,416	26,319		12,822,559	2,416

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

Table 5B, ESA Program - MFWB In-Unit																
Month	Gas & Electric				Gas Only				Electric Only				Total			
	# of Household Treated by	(Annual)			# of Household Treated by	(Annual)			# of Household Treated by	(Annual)			# of Household Treated by	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January																
February																
March																
April									177	(58.84)	12,215	0.46	177	(58.84)	12,215	0.46
May									21	(3.55)	1,867	0.04	21	(3.55)	1,867	0.04
June									82	(0.26)	26,011	0.48	82	(0.26)	26,011	0.48
July									1	(0.00)	582	0.01	1	(0.00)	582	0.01
August									257	1,002	136,763	3.06	257	1,002	136,763	3.06
September																
October																
November																
December																
YTD									538	939.51	177,437	4.06	538	939.51	177,437	4.06

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

Table 5C, ESA Program - Multifamily Whole Building (MFCAM) ¹¹																
Month	Gas & Electric				Gas Only				Electric Only				Total			
	# of Properties	(Annual)			# of Properties	(Annual)			# of Properties	(Annual)			# of Properties	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January																
February																
March																
April																
May																
June																
July																
August																
September																
October																
November																
December																
YTD																

¹¹Multifamily Whole Building/Common Area Measures; does not include in-unit measures, which are detailed in table 5B.

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

Table 5D, ESA Program - Pilot Plus and Pilot Deep																
Month	Gas & Electric				Gas Only				Electric Only				Total			
	# of Household Treated by	(Annual)			# of Household Treated by	(Annual)			# of Household Treated by	(Annual)			# of Household Treated by	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January																
February																
March	1	29	991	0.13									1	29	991	0.13
April	3	47	1,956	1.21									3	47	1,956	1.21
May	1	42	545	0.07									1	42	545	0.07
June	2	51	608	0.08									2	51	608	0.08
July																
August	11	1,066	10,871	2,033									11	1,066	10,871	2,033
September																
October																
November																
December																
YTD	18	1,235	14,971	2,034									18	1,235	14,971	2,034

**Energy Savings Assistance Program Table 5A - 5F - Energy Savings Assistance Program Customer Summary
Southern California Edison
Through August 2024**

Table 5E, ESA Program - Building Electrification (SCE Only)																
Month	Gas & Electric					Gas Only			Electric Only					Total		
	Household Treated by Month	Annual			Household Treated by Month	Annual		Household Treated by Month	Annual ⁽¹⁾			Household Treated by Month	Annual			
		Therm	kWh	kW		Therm	kWh		kW	Therm	kWh		kW	Therm	kWh	kW
January								5	1,856	(12,675)	-	5	1,856	(12,675)	-	
February								7	2,226	(11,692)	-	7	2,226	(11,692)	-	
March								5	2,028	(14,841)	-	5	2,028	(14,841)	-	
April								15	6,089	(41,061)	-	15	6,089	(41,061)	-	
May								15	5,843	(40,556)	-	15	5,843	(40,556)	-	
June								2	653	(5,037)	-	2	653	(5,037)	-	
July								10	3,875	(27,869)	-	10	3,875	(27,869)	-	
August								5	2,667	(17,935)	-	5	2,667	(17,935)	-	
September																
October																
November																
December																
YTD	-	-	-	-	-	-	-	-	64	25,237	(171,666)	-	64	25,237	(171,666)	-

⁽¹⁾ Sum of monthly Therm, kWh, and kW may have a variance when compared to the YTD because of rounding.

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

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

Energy Savings Assistance Program Table 6 - Expenditures for Pilots and Studies
Southern California Edison
Through August 2024

	Authorized 2021-26 Funding			Current Month Expenses			Year to Date Expenses			Cycle to Date Expenses			% of Budget Expended		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots															
ESA Pilot Plus/Deep Program Pilot	\$ 19,424,318	\$ -	\$ 19,424,318	\$ 61,137	\$ -	\$ 61,137	\$ 377,193	\$ -	\$ 377,193	\$ 1,151,874	\$ -	\$ 1,151,874	6%		6%
Building Electrification Retrofit Pilot	\$ 40,832,693	\$ -	\$ 40,832,693	\$ 288,458	\$ -	\$ 288,458	\$ 1,300,806	\$ -	\$ 1,300,806	\$ 2,062,004	\$ -	\$ 2,062,004	5%		5%
Clean Energy Homes New Construction Pilot	\$ 8,859,000	\$ -	\$ 8,859,000	\$ 17,963	\$ -	\$ 17,963	\$ 411,756	\$ -	\$ 411,756	\$ 1,159,892	\$ -	\$ 1,159,892	13%		13%
Total Pilots	\$69,116,010	\$ -	\$69,116,010	\$367,558	\$ -	\$367,558	\$2,089,755	\$ -	\$2,089,755	\$4,373,771	\$0	\$4,373,771	6%		6%
Pilot Evaluations (SCE)⁽¹⁾															
ESA Pilot Plus/Deep Program Pilot Evaluation	\$ 1,744,513	\$ -	\$ 1,744,513	\$ -	\$ -	\$ -	\$ 47,664	\$ -	\$ 47,664	\$ 184,439	\$ -	\$ 184,439	11%		11%
Building Electrification Retrofit Pilot Evaluation	\$ 594,930	\$ -	\$ 594,930	\$ 2,388	\$ -	\$ 2,388	\$ 47,155	\$ -	\$ 47,155	\$ 191,352	\$ -	\$ 191,352	32%		32%
Clean Energy Homes New Construction Pilot Evaluation	\$ 164,550	\$ -	\$ 164,550	\$ 5,208	\$ -	\$ 5,208	\$ 6,863	\$ -	\$ 6,863	\$ 28,495	\$ -	\$ 28,495	17%		17%
Total Pilot Evaluations	\$ 2,503,993	\$ -	\$ 2,503,993	\$ 7,595	\$ -	\$ 7,595	\$ 101,682	\$ -	\$ 101,682	\$ 404,286	\$ -	\$ 404,286	16%		16%
Studies⁽¹⁾⁽²⁾															
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study	\$ 75,000	\$ -	\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 74,901	\$ -	\$ 74,901	100%		100%
Joint IOU - 2025 Low Income Needs Assessment (LINA) Study ⁽¹⁾	\$ 75,000	\$ -	\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%		0%
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study	\$ 75,000	\$ -	\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%		0%
Joint IOU - Statewide CARE-ESA Categorical Study ⁽¹⁾	\$ 22,495	\$ -	\$ 22,495	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 22,494	\$ -	\$ 22,494	100%		100%
Load Impact Evaluation Study	\$ 450,000	\$ -	\$ 450,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%		0%
ESA Non-Energy Impacts (NEI) Study ⁽³⁾	\$ 150,000	\$ -	\$ 150,000	\$ 11,269	\$ -	\$ 11,269	\$ 48,867	\$ -	\$ 48,867	\$ 48,867	\$ -	\$ 48,867	33%		33%
Rapid Feedback Research and Analysis	\$ 155,000	\$ -	\$ 155,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%		0%
Joint IOU - Process Evaluation Studies (1-4 Studies)	\$ 150,000	\$ -	\$ 150,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%		0%
Total Studies	\$1,152,495	\$ -	\$1,152,495	\$11,269	\$ -	\$11,269	\$48,867	\$ -	\$48,867	\$146,262	\$0	\$146,262	13%		13%

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

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

⁽³⁾ Decision D.21-06-015 approved Joint Utilities' 2025 LINA Study for \$500,000. SoCalGas holds the statewide contract for this co-funded study. SCE has not been fully cross-billed so the actual amount incurred will be greater than what is reflected in this table until bills are reconciled. SCE's 30% allocation is \$150,000, funded 50/50 via the ESA and CARE budgets.

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

⁽⁵⁾ Decision D.21-06-015 approved Joint Utilities' 2022 ESA NEI Study for \$500,000. SCE holds the statewide contract for this co-funded study. SCE will cross-bill the other IOUs, but the total reflected includes spending for all four IOUs of which SCE only pays 30%.

⁽⁶⁾ Pilot Evaluation budget and expenditures are included in the overall budget and expenditures of the Pilot.

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

Energy Savings Assistance Program Table 7 - Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions
Southern California Edison
Through August 2024

ESA Main (SF, MH)

Customer Segments	# of Households Eligible ^[1]	# of Households Treated ^[2]	Enrollment Rate = (C/B)	# of Households Contacted ^[3]	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households
Demographic											
Housing Type											
SF	1,111,629	22,189	2.00%	5,921	575%	452	448	0.070	4.97	5.36	\$ 805
MH	122,664	4,126	3.36%	480	860%	482	477	0.080	(0.79)	(0.09)	\$ 598
MF In-Unit	452,445	4	0.00%	-	0%	621	621	0.090	(1.28)	(1.28)	\$ 783
Rent vs. Own											
Own	734,229	11,276	1.54%	4,440	254%	496	486	0.080	9.18	10.13	\$ 1,132
Rent	955,993	15,043	1.57%	1,961	767%	427	427	0.070	0.24	0.28	\$ 504
Previous vs. New Participant											
Previous	-	10,180	0.00%	1,958	520%	459	450	0.080	3.35	4.09	\$ 771
New Participant	27,051	16,139	59.66%	4,443	363%	455	454	0.070	4.76	4.76	\$ 774
Seniors	500,658	4,434	0.89%	1,707	260%	477	468	0.080	5.21	6.07	\$ 994
Veterans	95,822	484	0.51%	200	242%	471	470	0.080	12.98	13.44	\$ 1,060
Hard-to-Reach ^[4]	1,352,338	22,246	1.65%	6,228	357%	465	460	0.080	4.44	4.92	\$ 811
Vulnerable ^[5]	603,866	22,207	3.68%	4,921	451%	449	447	0.070	2.67	2.95	\$ 719
Location											
DAC	464,442	16,679	3.59%	2,904	574%	436	435	0.070	1.51	1.70	\$ 629
Rural	264,615	4,613	1.74%	1,960	235%	523	517	0.080	12.75	13.65	\$ 1,398
Tribal	8,832	115	1.30%	36	319%	483	490	0.080	11.10	11.10	\$ 933
PSPS Zone	118,256	67	0.06%	39	725%	428	428	0.070	(1.36)	(1.36)	\$ 708
Wildfire Zone	281,693	3,375	1.20%	1,400	241%	521	515	0.090	4.52	5.28	\$ 1,013
Climate Zone 06	255,532	1,310	0.51%	166	789%	376	376	0.050	(0.03)	(0.03)	\$ 555
Climate Zone 08	400,491	9,693	2.42%	1,426	680%	399	399	0.060	(0.04)	(0.04)	\$ 431
Climate Zone 09	328,310	4,017	1.22%	632	636%	510	510	0.080	(0.18)	(0.18)	\$ 598
Climate Zone 10	353,565	6,047	1.71%	1,918	315%	493	489	0.090	0.33	0.70	\$ 810
Climate Zone 13	89,360	2,398	2.68%	859	279%	505	498	0.070	13.79	14.54	\$ 1,775
Climate Zone 14	159,858	2,213	1.38%	1,151	192%	474	453	0.090	31.19	34.19	\$ 1,357
Climate Zone 15	64,877	375	0.58%	154	244%	601	548	0.120	13.88	14.69	\$ 1,773
Climate Zone 16	38,147	266	0.70%	95	280%	513	512	0.120	(3.89)	(2.58)	\$ 803
CARB Communities ^[6]	169,417	7,494	4.42%	983	762%	387	387	0.060	(0.20)	(0.16)	\$ 429
Financial											
CARE	1,302,665	15,290	1.17%	5,864	261%	466	461	0.080	5.30	5.81	\$ 853
FERA	211,756	171	0.08%	66	259%	471	468	0.080	7.28	7.57	\$ 844
Disconnected ^[7]	35,313	165	0.47%	25	660%	473	471	0.070	1.40	1.52	\$ 817
Arrearages	687,677	6,334	0.92%	1,264	501%	446	441	0.070	3.63	4.05	\$ 744
High Usage	69,406	399	0.57%	164	243%	460	450	0.080	6.67	7.62	\$ 886
High Energy Burden ^[8]	372,317	6,058	1.63%	2,499	242%	502	489	0.090	13.81	15.14	\$ 1,314
SEVI^[9]											
Low ^[9]	203,389	1,566	0.77%	503	311%	511	506	0.090	2.81	3.43	\$ 922
Medium ^[9]	595,200	7,961	1.34%	2,685	296%	490	482	0.090	7.21	8.01	\$ 966
High ^[9]	523,601	16,792	3.21%	3,213	523%	436	434	0.070	2.70	2.94	\$ 667
Affordability Ratio ^[10]	88,451	26,018	29.42%	6,383	408%	456	452	0.070	4.12	4.56	\$ 775
Health Condition											
Medical Baseline	26,355	927	3.52%	506	183%	496	489	0.080	11.55	12.42	\$ 1,122
Respiratory^[11]											
Low ^[11]	370,549	1,753	0.47%	586	299%	535	532	0.090	2.82	3.01	\$ 973
Medium ^[11]	506,698	10,294	2.03%	2,591	397%	468	464	0.070	3.10	3.40	\$ 755
High ^[11]	444,943	14,272	3.21%	3,224	443%	439	434	0.070	4.93	5.48	\$ 761
Disabled	351,490	2,368	0.67%	915	259%	456	446	0.070	4.50	5.62	\$ 914

Customer Segments:

NOTES:

^[1] Athens eligibility estimates at 250 FPL applied to customer segment population.

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

^[3] Includes only households that SCE contacted by direct mail or email campaigns in CY2023. Customers could also have been contacted multiple times within a year. They could also be contacted by other means, such as by contractors or another utility, which is not reflected in this value. SCE only tracks its direct mail and email campaign efforts.

^[4] "Hard to Reach" is defined as a customer who meets at least one of the following characteristics: Prefers non-English language, is low income, lives in a mobile home or multifamily dwelling unit, is a renter/tenant, or is Rural.

^[5] Vulnerable is defined as Disadvantaged Vulnerable Communities (DVC) which consists of communities in the 25% highest scoring census tracts according to the most current versions of the CalEnviroScreen, as well as 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.

^[6] Utilized AB617 Communities identified by CARB's Community Air Protection Program (CAPP).

^[7] Based on calendar year 2023.

^[8] 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).

^[9] 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.

^[10] Utilizing AR20 data, census tracts with Electric AR20 above 15% is selected. Threshold based on CPUC 2019 Annual Affordability Report.

^[11] Based on Asthma score in CalEnviroScreen 4.0.

Multifamily Whole Building (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 Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households
Location											
DAC											
Rural											
Tribal											
PSPS Zone											
Wildfire Zone											
Climate Zone 06											
Climate Zone 08											
Climate Zone 09											
Climate Zone 10											
Climate Zone 13											
Climate Zone 14											
Climate Zone 15											
Climate Zone 16											
CARB Communities											
Other											
Vulnerable											
High Energy Burden											
SEVI											
Low											
Medium											
High											
Affordability Ratio											
Respiratory											
Low											
Medium											
High											

NOTE: No activity to report as of August 2024.

Energy Savings Assistance Program Table 7 - Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions
Southern California Edison
Through August 2024

MFWB (individual in-unit treatment)

Customer Segments	# of Units Eligible	# of Units Treated [1]	Enrollment Rate = (C/B)	# of Units Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Unit (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Unit (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Unit	Avg. Energy Savings (Therms) Per Treated Unit (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Unit (Energy Saving Measures only)	Avg. Cost Per Treated Unit
Rent vs. Own											
Own		8				546	546	0.01	4.14	4.14	\$ 432
Rent		530				327	327	0.01	1.71	1.71	\$ 332
Previous vs. New Participant											
New		538				330	330	0.01	1.75	1.75	\$ 333
Previous		NA				NA	NA	NA	NA	NA	NA
Seniors		409				288	288	0.01	2.18	2.18	\$ 300
Veterans		11				233	233	0.01	(0.41)	(0.41)	\$ 233
Hard-to-Reach ^[2]		535				329	329	0.01	1.76	1.76	\$ 332
Vulnerable ^[3]		403				362	362	0.01	2.31	2.31	\$ 333
Location											
DAC		334				425	425	0.01	2.97	2.97	\$ 369
Rural		76				283	283	0.01	11.85	11.85	\$ 390
Tribal		-				-	-	-	-	-	\$ -
PSPS Zone ^[4]		-				-	-	-	-	-	\$ -
Wildfire Zone		172				384	384	0.01	0.76	0.76	\$ 443
Climate Zone 06		28				408	408	0.01	(0.72)	(0.72)	\$ 228
Climate Zone 08		206				160	160	0.00	(0.36)	(0.36)	\$ 272
Climate Zone 09		66				46	46	0.01	(0.88)	(0.88)	\$ 157
Climate Zone 10		210				567	567	0.01	4.68	4.68	\$ 446
Climate Zone 13		7				1	1	0.00	8.59	8.59	\$ 449
Climate Zone 14		1				-	-	-	-	-	\$ -
Climate Zone 15		-				-	-	-	-	-	\$ -
Climate Zone 16		-				795	795	0.01	(0.45)	(0.45)	\$ 602
CARB Communities ^[4]		-				-	-	-	-	-	\$ -
Financial											
CARE		336				347	347	0.01	2.55	2.55	\$ 340
PERA		-				-	-	-	-	-	\$ -
Disconnected ^[5]		-				-	-	-	-	-	\$ -
Arrearages ^[5]		-				-	-	-	-	-	\$ -
High Usage ^[5]		-				-	-	-	-	-	\$ -
High Energy Burden ^[5]		140				515	515	0.01	7.47	7.47	\$ 546
SEVI ^[6]											
Low		5				41	41	0.00	10.50	10.50	\$ 397
Medium		111				173	173	0.01	(0.32)	(0.32)	\$ 292
High		422				374	374	0.01	2.18	2.18	\$ 343
Affordability Ratio ^[7]		533				333	333	0.01	1.66	1.66	\$ 332
Health Condition											
Medical Baseline		10				353	353	0.01	6.57	6.57	\$ 463
Respiratory ^[8]											
Low		230				197	197	0.01	(0.31)	(0.31)	\$ 266
Medium		91				644	644	0.01	(0.09)	(0.09)	\$ 326
High		217				339	339	0.01	4.70	4.70	\$ 407
Disabled		157				356	356	0.01	3.60	3.60	\$ 325

Customer Segments:

Households Treated

Hard to Reach

Vulnerable

CARB Communities

High Energy Burden

SEVI

Affordability Ratio

Respiratory

Pilot Plus and Pilot Deep

NOTES:

^[1] Households Treated data is not additive because customers may be represented in multiple categories.

^[2] "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.

^[3] 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.

^[4] Utilized AB617 Communities identified by CARB's Community Air Protection Program (CAPP).

^[5] 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).

^[6] 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.

^[7] Utilizing AR20 data, census tracts with Electric AR20 above 15% is selected. Threshold based on CPUC 2019 Annual Affordability Report.

^[8] Based on Asthma score in CalEnviroScreen 4.0.

^[9] Segment will be calculated in future reporting due to incomplete customer contract information.

Customer Segments	# of Households Eligible ^[1]	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	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 Households	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households
Demographic											
Housing Type											
SF	17,726	18	0.10%	1,364	1.32%	832	-	113.02	69	-	\$ 13,142
MH	N/A	N/A	0.00%	N/A	0.00%	N/A	N/A	N/A	N/A	N/A	N/A
MF In-Unit	N/A	N/A	0.00%	N/A	0.00%	N/A	N/A	N/A	N/A	N/A	N/A
Rent vs. Own											
Own	3,829	16	0.42%	312	5.13%	835	-	113.11	71	-	\$ 13,220
Rent	677	2	0.30%	63	3.17%	786	-	112.38	49	-	\$ 12,518
Previous vs. New Participant											
Previous	2,458	8	0.33%	187	4.28%	612	-	68.43	41	-	\$ 13,665
New Participant	14,872	10	0.07%	1,147	0.87%	1,004	-	148.71	90	-	\$ 12,724
Seniors	N/A	N/A	0.00%	N/A	0.00%	N/A	N/A	N/A	N/A	N/A	N/A
Veterans	N/A	N/A	0.00%	N/A	0.00%	N/A	N/A	N/A	N/A	N/A	N/A
Hard-to-Reach	12,327	14	0.11%	1,025	1.37%	811	-	100.01	63	-	\$ 13,702
Vulnerable	10,683	8	0.07%	797	1.00%	992	-	161.86	79	-	\$ 14,703
Location											
DAC	611	1	0.16%	23	4.35%	913	-	0.79	26	-	\$ 11,386
Rural	1,749	10	0.57%	68	14.71%	750	-	106.06	75	-	\$ 8,910
Tribal	1,345	1	0.07%	15	6.67%	569	-	224.65	47	-	\$ 13,461
PSPS Zone	10,807	1	0.01%	1,075	0.09%	871	-	163.95	97	-	\$ 11,701
Climate Zone 06	341	0	0.00%	16	0.00%	-	-	-	-	-	\$ -
Climate Zone 08	2,396	0	0.00%	174	0.00%	-	-	-	-	-	\$ -
Climate Zone 09	4,639	6	0.13%	215	2.79%	123	-	88.57	40	-	\$ 14,792
Climate Zone 10	8,410	10	0.12%	854	1.17%	739	-	86.00	52	-	\$ 10,637
Climate Zone 13	N/A	N/A	0.00%	N/A	0.00%	N/A	N/A	N/A	N/A	N/A	N/A
Climate Zone 14	1,637	2	0.12%	29	0.00%	1,741	-	217.93	91	-	\$ 20,721
Climate Zone 15	184	0	0.00%	28	0.00%	-	-	-	-	-	\$ -
Climate Zone 16	119	0	0.00%	48	0.00%	-	-	-	-	-	\$ -
CARB Communities	1,451	1	0.07%	278	0.36%	313	-	0.02	56	-	\$ 17,986

Energy Savings Assistance Program Table 7 - Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions
Southern California Edison
Through August 2024

Financial												
CARE	17,726	6	0.03%	22	27.27%	627	-	0.25	29	-	\$	11,196
FERA	17,689	12	0.00%	1,342	0.89%	931	-	169.41	88	-	\$	14,116
Disconnected	88	0	0.00%	4	0.00%	-	-	-	-	-	\$	-
Arrearages	10,474	8	0.08%	854	0.94%	874	-	145.24	79	-	\$	13,184
High Usage	17,726	18	0.10%	1,364	1.32%	832	-	113.02	69	-	\$	13,142
High Energy Burden	17,210	0	0.00%	1,355	0.00%	-	-	-	-	-	\$	-
SEVI												
Low	1,819	1	0.05%	27	3.70%	295	-	0.06	86	-	\$	8,972
Medium	4,981	10	0.20%	336	2.98%	399	-	0.22	24	-	\$	10,878
High	10,926	7	0.06%	1,001	0.70%	971	-	189.37	22	-	\$	11,393
Affordability Ratio	17,572	18	0.10%	1,360	1.32%	832	-	113.02	69	-	\$	13,142
Health Condition												
Medical Baseline	347	0	0.00%	24	0.00%	-	-	-	-	-	\$	-
Respiratory												
Low	N/A	N/A	0.00%	N/A	0.00%	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Medium	N/A	N/A	0.00%	N/A	0.00%	N/A	N/A	N/A	N/A	N/A	N/A	N/A
High	N/A	N/A	0.00%	N/A	0.00%	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Disabled	N/A	N/A	0.00%	N/A	0.00%	N/A	N/A	N/A	N/A	N/A	N/A	N/A

^[1] Based on Year 1 Cohort.

Building Electrification (SE Only)

Customer Segments	# of Households Eligible ^[1]	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted ^[2]	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures) ^[3]	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only) ^[3]	Avg. Peak Demand Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households
Demographic											
Housing Type					0%						
SF		64			0%	8,872	8,872	-	394	394	\$ 20,547
MH					0%						
MF In-Unit					0%						
Rent vs. Own											
Own		59			0%	9,008	9,008	-	400	400	\$ 20,608
Rent		5			0%	7,256	7,256	-	332	332	\$ 19,851
Previous vs. New Participant											
Previous					0%						
New Participant		64			0%	8,872	8,872	-	394	394	\$ 20,547
Seniors					0%						
Veterans					0%						
Hard-to-Reach					0%						
Vulnerable					0%						
Location											
DAC		64			0%	8,872	8,872	-	394	394	\$ 20,547
Rural					0%						
Tribal					0%						
PSPS Zone					0%						
Wildfire Zone					0%						
Climate Zone 06					0%						
Climate Zone 08		16			0%	5,747	5,747	-	248	248	\$ 20,216
Climate Zone 09		3			0%	8,604	8,604	-	371	371	\$ 20,238
Climate Zone 10		29			0%	10,610	10,610	-	473	473	\$ 21,121
Climate Zone 13		5			0%	8,614	8,614	-	384	384	\$ 20,030
Climate Zone 14		8			0%	9,472	9,472	-	430	430	\$ 19,994
Climate Zone 15		2			0%	7,267	7,267	-	321	321	\$ 18,715
Climate Zone 16		1			0%	8,964	8,964	-	435	435	\$ 20,782
CARB Communities					0%						
Financial											
CARE		53			0%	9,068	9,068	-	402	402	\$ 20,716
FERA					0%						
Disconnected					0%						
Arrearages					0%						
High Usage					0%						
High Energy Burden					0%						
SEVI											
Low					0%						
Medium					0%						
High					0%						
Affordability Ratio					0%						
Health Condition											
Medical Baseline					0%						
Respiratory											
Low					0%						
Medium					0%						
High					0%						
Disabled					0%						

^[1] Eligible households not applicable to BE Pilot.

^[2] Number of customers contacted will be updated in future reporting.

^[3] The kWh Savings are based on the Claimable Savings from ESA Table 2C.

**Energy Savings Assistance Program Table 8 - Clean Energy Referral, Leveraging, and Coordination
Southern California Edison
Through August 2024**

Partner	Brief Description of Effort	Outbound			Inbound	
		# of Referral ^[1]	# of Leveraging ^[2]	# of Coordination Efforts ^[3]	# of Leads ^[4]	# of Enrollments ^[5]
Single-Family Affordable Solar Homes (SASH) ^[6]	Provides qualified low-income homeowners fixed, up front, capacity-based incentives to help offset the upfront cost of a solar electric system.	33 ^[11]	N/A	N/A	352	138
Multifamily Affordable Solar Housing (MASH)	Provides solar incentives on qualifying affordable housing multifamily dwellings. MASH is the low-income, multifamily component within the California Solar Initiative program.	0	49	N/A	12	0
Medical Baseline (MBL)	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.	N/A	N/A	90	378	378
CARE/FERA Income Verification ^[6]	Number of ESA Main enrollments with their income having been verified by ESA program that had the rate CARE/FERA identified and show no indication of previous PEV.	N/A	N/A	N/A	N/A	N/A
CARE High Usage ^[7]	Customers whose usage was identified as exceeding 400% to 600% (or more) above the baseline.	N/A	N/A	N/A	803	41
Cool Center Informational Exchange	SCE provides information to respective counties' cool centers within the SCE service territory about all of the low-income programs and services that are available.	N/A	N/A	1	N/A	N/A
Demand Response - Summer Discount Plan (SDP) ^[7]	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.	21	N/A	8	N/A	N/A
Demand Response - Smart Energy Program (SEP) ^[7]	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.	249	N/A	8	N/A	N/A
Tribal Activity	SCE collaborated with Tribal leaders, offering \$13K mini grants aimed at providing training on SCE's income-qualified programs. The objective was to empower Tribal leaders to act as intermediaries within their communities, disseminating information about these programs to increase Tribal enrollments and installations. In addition, the SCE Tribal team engages daily with 13 federally recognized tribes to promote SCE products and services.	N/A	N/A	26	0	N/A
Other Utilities ^[8]	Southwest Gas	299	0	N/A	969	15
Other Utilities ^[8]	SoCalGas	N/A	N/A	N/A	6,185	3,728
Other Utilities ^[8]	PG&E	N/A	N/A	N/A	N/A	N/A
MFWB ^[9]	Coordination with RHA (SDG&E's Implementer) for the Southern MFWB program	1,601	N/A	1	N/A	N/A
ESA Whole Home to ESA Main ^[13]	Number of homes referred to ESA Main due to home not being able to meet minimum 5% or be eligible for ESA Whole Home participation.	N/A	N/A	N/A	509	398

[1] Number of outbound referrals being given to the Partner.
 [2] Number of activities that involve the sharing of resources to jointly support program delivery or administration. (Example: Sharing of Lead Lists, Cost Splitting, etc.).
 [3] Number of unique activities related to program communication (marketing), collaboration of events, and alignment of activities (outreach events, trashshows, etc.) to support program awareness and delivery. Unique marketing activities are different types of activities, not the total sum of the correspondences. Events are unique event counts, not the total sum of event days.
 [4] Number of inbound Leads or Referrals from the Partner.
 [5] Number of enrollments that results from the Leads or Referrals supplied by the Partner.
 [6] Utility Territorial Overlap; Referrals being exchanged between the utilities.
 [7] Cumulative number of customers that enrolled in the program within 120-days of their ESA in-home visitation in which they received Energy Education.
 [8] Number of referrals being supplied to SDG&E by SCE and the number of Enrollments being completed on behalf of SCE by MFWB.
 [9] Scheduled to commence Q3 2024.
 [10] D.16-11-022, OP 84: "Starting January 1, 2017, Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company shall provide the Singlefamily Affordable Solar Homes Program Administrator, current GRID Alternatives, with a monthly list of owner occupied singlefamily households that have completed the Energy Savings Assistance (ESA) Program requirements of the California Alternate Rates for Energy (CARE) Program high usage process."
 [11] This number includes the 25 customer referrals from PY 2023 that SCE did not share with GRID Alternatives until February 2024 because of administrative oversight.
 [12] This number only reflects customers accounted for in SCE's iEnergy Database
 [13] Data shown is left unchanged from prior month. Third party is in the process of analyzing its data sources and reporting process. The goal is to ensure data reported is updated next month.

**Energy Savings Assistance Program Table - 9 Tribal Outreach
Southern California Edison
Through August 2024**

OUTREACH STATUS	Quantity (Includes CARE, FERA, and ESA)	List of Participating Tribes
Tribes completed ESA Meet & Confer	1	Bridgeport Indian Colony
Tribes requested outreach materials or applications	8	Bridgeport Indian Colony, Soboba, Bishop Paiute, Morongo, Benton Paiute, Timbisha Shoshone, Pechanga, Agua Caliente
Tribes who have not accepted offer to Meet and Confer	3	Twenty-Nine Palms, Timbisha Shoshone Tribe, Benton Paiute Tribe
Non-Federally Recognized Tribes who participated in Meet & Confer	2	Bridgeport Indian Colony, Bishop Paiute Tribe
Tribes and Housing Authority sites involved in Focused Project/ESA	1	Bridgeport Indian Colony
Partnership offer on Tribal Lands	0	
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	0	
Housing Authority and TANF offices who participated in Meet and Confer	0	

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

CARE Program Table 1 - Program Expenses
Southern California Edison
Through August 2024

CARE Program:	Authorized Budget ⁽¹⁾			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Outreach	\$ 3,699,872		\$ 3,699,872	\$ 84,746		\$ 84,746	\$ 1,572,498		\$ 1,572,498	43%		43%
Processing / Certification Re-certification	\$ 1,615,434		\$ 1,615,434	\$ 175,935		\$ 175,935	\$ 1,234,375		\$ 1,234,375	76%		76%
Post Enrollment Verification	\$ 510,137		\$ 510,137	\$ 22,057		\$ 22,057	\$ 127,879		\$ 127,879	25%		25%
IT Programming	\$ 570,000		\$ 570,000	\$ 53,821		\$ 53,821	\$ 101,769		\$ 101,769	18%		18%
CHANGES Program	\$ 525,000		\$ 525,000	\$ 36,312		\$ 36,312	\$ 195,533		\$ 195,533	37%		37%
Studies and Pilots	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Measurement and Evaluation	\$ 36,000		\$ 36,000	\$ (571)		\$ (571)	\$ (764)		\$ (764)	-2%		-2%
Regulatory Compliance	\$ 493,041		\$ 493,041	\$ 8,083		\$ 8,083	\$ 237,352		\$ 237,352	48%		48%
General Administration	\$ 1,417,444		\$ 1,417,444	\$ 167,221		\$ 167,221	\$ 1,334,791		\$ 1,334,791	94%		94%
CPUC Energy Division	\$ 135,625		\$ 135,625	\$ 287		\$ 287	\$ 7,953		\$ 7,953	6%		6%
SUBTOTAL MANAGEMENT COSTS	\$ 9,002,553	\$ -	\$ 9,002,553	\$ 547,892	\$ -	\$ 547,892	\$ 4,811,386	\$ -	\$ 4,811,386	53%	0%	53%
CARE Rate Discount	\$ 415,120,450		\$ 415,120,450	\$ 114,321,592		\$ 114,321,592	\$ 559,567,355		\$ 559,567,355	135%		135%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 424,123,003		\$ 424,123,003	\$ 114,869,484		\$ 114,869,484	\$ 564,378,740		\$ 564,378,740	133%	0%	133%
Other CARE Rate Benefits												
- DWR Bond Charge Exemption				\$ 2,601,067		\$ 2,601,067	\$ 12,281,623		\$ 12,281,623			
- CARE Surcharge Exemption				\$ 5,661,145		\$ 5,661,145	\$ 26,836,959		\$ 26,836,959			
- kWh Surcharge Exemption												
- Vehicle Grid Integration Exemption												
Total Other CARE Rate Benefits				\$ 8,262,211	\$ -	\$ 8,262,211	\$ 39,118,582	\$ -	\$ 39,118,582			
Indirect Costs				\$ 113,016		\$ 113,016	\$ 861,510		\$ 861,510			

⁽¹⁾ Budget authorized in D.21-06-015, Attachment 1.

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

**CARE Program Table 2 - Enrollment, Recertification, & Attrition
Southern California Edison
Through August 2024**

	New Enrollment									Recertification				Attrition (Drop Offs)					Enrollment		Total CARE Participants	Estimated CARE Eligible ⁽⁶⁾	Enrollment Rate % (W/X)	Total Residential Accounts	Gas Only	Electric Only			
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment ⁽⁷⁾ (E+J)	Scheduled	Non-Scheduled	Automatic	Total Recertification (L+M+N)	No Response ⁽⁵⁾	Failed PEV	Failed Recertification	Other ^(5,7)	Total Attrition (P+Q+R+S)	Gross (K+O)							Net Adjusted (K-T)		
	Inter-Utility ⁽¹⁾	Intra-Utility ⁽²⁾	Leveraging ⁽³⁾	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																				
January	71	89	554	714	14,213	3,177	7,021	141	24,552	25,266	788	207	44	1,039	2,020	1	53	5,468	7,542	26,305	17,724	1,307,217	1,302,665	100%	4,595,535		4,595,535		
February	72	37	60	169	12,390	2,305	6,276	114	21,085	21,254	1,299	261	1,131	2,691	2,018	5	33	11,863	13,919	23,945	7,335	1,314,552	1,302,665	101%	4,599,916		4,599,916		
March	71	32	250	353	12,665	5,241	6,677	180	24,763	25,116	2,447	241	1,992	4,680	2,865	5	46	16,339	19,255	29,796	5,861	1,320,413	1,302,665	101%	4,603,164		4,603,164		
April	83	43	65	191	12,389	5,427	7,045	167	24,928	25,119	1,117	253	285	1,655	4,669	4	55	18,492	23,220	26,774	1,899	1,322,312	1,302,665	102%	4,607,540		4,607,540		
May	105	107	534	746	13,047	5,035	6,164	202	24,448	25,194	1,994	165	51	2,210	1,503	5	46	10,056	11,610	27,404	13,584	1,335,896	1,302,665	103%	4,614,130		4,614,130		
June	78	83	496	657	12,660	4,766	4,818	204	22,448	23,105	3,141	3,155	21	6,317	4,349	3	83	25,187	29,622	29,422	-6,517	1,329,379	1,302,665	102%	4,614,577		4,614,577		
July	578	126	422	1,126	13,446	4,467	5,007	332	23,252	24,378	1,065	3,275	1,898	6,238	4,950	3	138	4,656	9,747	30,616	14,631	1,344,010	1,302,665	103%	4,616,791		4,616,791		
August	1,363	104	391	1,858	22,098	10,450	8,955	312	41,815	43,673	10,670	8,319	5,734	24,723	9,596	0	147	21,078	30,821	68,396	12,852	1,356,862	1,302,665	104%	4,626,834		4,626,834		
September																													
October																													
November																													
December																													
YTD Total	2,421	621	2,772	5,814	112,808	40,868	51,963	1,652	207,291	213,105	22,521	15,876	11,156	49,553	31,970	26	601	113,139	145,736	262,658	67,369	1,356,862	1,302,665	104%	4,626,834		4,626,834		

⁽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⁾ Includes customers who requested to be removed, deceased, and customers who moved out.

⁽⁶⁾ Based on the Annual Estimates of CARE and FERA Eligible Customers and Related Information filed on April 15, 2024.

⁽⁷⁾ SCE is currently investigating the new enrollments and drop-offs and will update the data once we identify the issue.

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

CARE Program Table 3A - Post-Enrollment Verification Results (Model)
Southern California Edison
Through August 2024

Month	Total CARE Households Enrolled	Households Requested to Verify ^[3]	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ^[1]	Total Households De-enrolled ^[2]	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-enrolled
January	1,307,217	3,982	0.3%	916	24	940	23.6%	0.1%
February	1,314,552	1,530	0.1%	0	3	3	0.2%	0.0%
March	1,320,413	3,107	0.2%	681	9	690	22.2%	0.1%
April	1,322,312	608	0.0%	0	0	0	0.0%	0.0%
May	1,335,896	425	0.0%	1	0	1	0.2%	0.0%
June	1,329,379	251	0.0%	2	0	2	0.8%	0.0%
July	1,344,010	267	0.0%	0	0	0	0.0%	0.0%
August	1,356,862	37	0.0%	0	0	0	0.0%	0.0%
September								
October								
November								
December								
YTD Total	1,356,862	10,207	0.8%	1,600	36	1,636	16.0%	0.1%

^[1] Includes customers verified as over income or who requested to be de-enrolled.

^[2] Verification results are tied to the month initiated. The 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.

^[3] D.19-07-015 established a permanent set of emergency disaster customer protection measures that the utilities are mandated to implement in the event of a declared emergency. In response to the mandated customer protections, SCE has implemented a CARE post-enrollment verification (PEV) freeze to low-income customers impacted by the California emergencies / events for a period of one year commencing from the date the Governor of California issued an emergency proclamation due to a disaster. Applicable to April 2023 reporting and beyond. Number of requests updated to exclude customers exempted due to emergency disaster protections.

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

CARE Program Table 3B Post-Enrollment Verification Results (Electric only High Usage)
Southern California Edison
Through August 2024

Month	Total CARE Households Enrolled	Households Requested to Verify ^[3]	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ^[1]	Total Households De-enrolled ^[2]	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-enrolled
January	1,307,217	880	0.1%	695	7	702	79.8%	0.1%
February	1,314,552	90	0.0%	72	0	72	80.0%	0.0%
March	1,320,413	216	0.0%	111	0	111	51.4%	0.0%
April	1,322,312	359	0.0%	213	2	215	59.9%	0.0%
May	1,335,896	122	0.0%	24	1	25	20.5%	0.0%
June	1,329,379	111	0.0%	33	1	34	30.6%	0.0%
July	1,344,010	80	0.0%	0	0	0	0.0%	0.0%
August	1,356,862	6	0.0%	0	0	0	0.0%	0.0%
September								
October								
November								
December								
YTD Total	1,356,862	1,864	0.1%	1,148	11	1,159	62.2%	0.1%

^[1] Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

^[2] Verification results are tied to the month initiated. The process allows customers 45 days to respond to the verification request. Results may be pending due to the time permitted for a participant to respond.

^[3] D.19-07-015 established a permanent set of emergency disaster customer protection measures that the utilities are mandated to implement in the event of a declared emergency. In response to the mandated customer protections, SCE has implemented a CARE post-enrollment verification (PEV) freeze to low-income customers impacted by the California emergencies / events for a period of one year commencing from the date the Governor of California issued an emergency proclamation due to a disaster. Applicable to April 2023 reporting and beyond. Number of requests updated to exclude customers exempted due to emergency disaster protections.

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

CARE Program Table 4 - Enrollment by County
Southern California Edison
Through August 2024

County	Estimated Eligible Households ^[1]			Total Households Enrolled ^[2]			Enrollment Rate ^[3]		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Fresno	630	0	630	41	0	41	7%	0%	7%
Imperial	0	280	280	0	29	29	0%	10%	10%
Inyo	10	1,573	1,583	39	1,014	1,053	390%	64%	67%
Kern	12,355	15,987	28,342	10,740	15,073	25,813	87%	94%	91%
Kings	0	8,253	8,253	186	10,065	10,251	0%	122%	124%
Los Angeles	515,528	2,869	518,397	552,375	2,500	554,875	107%	87%	107%
Madera	2	0	2	0	0	0	0%	0%	0%
Mariposa	0	0	0	0	0	0	0%	0%	0%
Mono	0	2,425	2,425	11	879	890	0%	36%	37%
Orange	199,629	0	199,629	180,026	0	180,026	90%	0%	90%
Riverside	91,187	89,224	180,411	97,678	105,502	203,180	107%	118%	113%
San Bernardino	182,914	38,940	221,854	209,410	42,107	251,517	114%	108%	113%
San Diego	0	1	1	0	1	1	0%	100%	100%
Santa Barbara	19,182	0	19,182	9,692	0	9,692	51%	0%	51%
Tulare	13,880	41,853	55,733	14,241	48,551	62,792	103%	116%	113%
Ventura	63,712	2,231	65,943	54,711	1,991	56,702	86%	89%	86%
Total	1,099,029	203,636	1,302,665	1,129,150	227,712	1,356,862	103%	112%	104%

^[1] Based on the Annual Estimates of CARE and FERA Eligible Customers and Related Information filed on April 15, 2024.

^[2] Total Households Enrolled includes submeter tenants.

^[3] Penetration Rate and Enrollment Rate are the same value.

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

**CARE Program Table 5 - Recertification Results
Southern California Edison
Through August 2024**

Month	Total CARE Households	Households Requested to Recertify ^{[1][2][5]}	% of Households Total (C/B)	Households Recertified	Households De-enrolled ^[3]	Recertification Rate % ^[4] (E/C)	% of Total Households De-enrolled (F/B)
January	1,307,217	2,842	0.2%	1,170	983	41.2%	0.1%
February	1,314,552	2,020	0.2%	511	792	25.3%	0.1%
March	1,320,413	6,515	0.5%	1,310	3,400	20.1%	0.3%
April	1,322,312	10,947	0.8%	1,865	4,962	17.0%	0.4%
May	1,335,896	19,819	1.5%	3,360	7,886	17.0%	0.6%
June	1,329,379	29,328	2.2%	5,786	5,513	19.7%	0.4%
July	1,344,010	46,166	3.4%	6,140	252	13.3%	0.0%
August	1,356,862	33,055	2.4%	2,537	130	7.7%	0.0%
September							
October							
November							
December							
YTD	1,356,862	150,692	11.1%	22,679	23,918	15.0%	1.76%

^[1] Excludes count of customers recertified through the probability model.

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

^[3] Includes customers who did not respond or who requested to be de-enrolled. Does not include customers who were deenrolled due to other reasons such as moved out, no response/failed verification, deceased, and etc.

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

^[5] D.19-07-015 established a permanent set of emergency disaster customer protection measures that the utilities are mandated to implement in the event of a declared emergency. In response to the mandated customer protections, SCE has implemented a CARE post-enrollment verification (PEV) freeze to low-income customers impacted by the California emergencies / events for a period of one year commencing from the date the Governor of California issued an emergency proclamation due to a disaster. Number of requests updated to exclude customers exempted due to emergency disaster protections.

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

CARE Table 6 - Capitation Agencies^[1]
Southern California Edison
Through August 2024

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
2-1-1 ORANGE COUNTY		x			1	15
ALPHA ENTERPRISES		x			-	-
APAC SERVICE CENTER	x				7	22
ARMENIAN RELIEF SOCIETY	x				-	-
ASIAN AMERICAN DRUG ABUSE PROG	x				-	-
ASIAN AMERICAN RESOURCE CENTER	x		x		6	36
ASIAN YOUTH CENTER	x				-	-
BEST PARTNERS	x				284	1,474
BETHEL BAPTIST CHURCH	x				-	-
BISHOP PAIUTE TRIBE	x				-	1
C.O.R. COMM DEVELOPMENT CORP	x				-	-
CAREGIVERS VOLUNTEERS ELDERLY		x			-	-
CHINESE CHRISTIAN HERALD CRUS.	x				-	-
CHINO NEIGHBORHOOD HOUSE		x			-	-
CITIHOUSING REAL ESTATE SERVIC		x			-	-
CITY IMPACT	x				-	-
CITY OF BEAUMONT SENIOR CENTER		x	x		-	-
COMMUNITY HEALTH INITIATIVE of OC		x			-	-
DELHI CENTER	x				-	-
DESERT COMMUNITY ENERGY		x			-	-
DESERT MANNA MINISTRIES INC	x				-	-
DISABLED RESOURCES CTR, INC		x	x		-	19
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		-	15
HELP OF OJAI, INC.	x				-	-
HOUSING AUTHORITY OF KINGS CO	x		x		-	-
INLAND SOCAL 211+	x	x			11	52
KERNVILLE UNION SCHOOL DISTRIC	x				-	-
KINGS COMMUNITY ACTION ORG	x				-	-
KINGS CTY COMMISSION ON AGING	x				-	-
LA COUNTY HOUSING AUTHORITY		x			-	-
LEAGUE OF CALIF HOMEOWNERS	x				-	-
LIFT TO RISE	x				-	1
LTSC COMM. DEVEL. CORP	x				1	2
MENIFEE VALLEY CHAMBER OF COMMERCE		x			-	-
MEXICAN AMERICAN OPPORTUNITY		x	x		-	-
MTN COMM FAM RESOURCE CNTR	x				1	5
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				1	10
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				-	-

CARE Table 6 - Capitation Agencies^[1]
Southern California Edison
Through August 2024

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
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					312	1,652

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

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

CARE Program Table 7 - Expenditures for Pilots and Studies
Southern California Edison
Through August 2024

	Authorized 2021-2026 Budget			Current Month Expenses			Year to Date Expenses			Cycle to Date Expenses		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots												
Total Pilots	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -
Studies^{[1][2]}												
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study	\$ 75,000		\$ 75,000	\$ -		\$ -	\$ -		\$ -	\$ 74,901		\$ 74,901
Joint IOU - 2025 Low Income Needs Assessment (LINA) Study ^[3]	\$ 75,000		\$ 75,000	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study	\$ 75,000		\$ 75,000	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -
Joint IOU - Statewide CARE-ESA Categorical Study ^[4]	\$ 22,495		\$ 22,495	\$ -		\$ -	\$ -		\$ -	\$ 22,494		\$ 22,494
Joint IOU - CHANGES Evaluation 1 ^[5]	\$ 73,503		\$ 73,503	\$ -		\$ -	\$ -		\$ -	\$ 73,503		\$ 73,503
Joint IOU - CHANGES Evaluation 2 ^[5]	\$ 52,676		\$ 52,676	\$ -		\$ -	\$ -		\$ -			\$ -
Total Studies	\$ 373,674		\$ 373,674	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 170,898		\$ 170,898

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

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

^[3] Decision D.21-06-015 approved Joint Utilities' 2025 LINA Study for \$500,000. SoCalGas holds the statewide contract for this co-funded study. SCE has not been fully cross-billed so the actual amount incurred will be greater than what is reflected in this table until bills are reconciled. SCE's 30% allocation is \$150,000, funded 50/50 via the ESA and CARE budgets.

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

^[5] CHANGES Evaluation funding is not part of EM&V budget, but funded out of CARE budget as part of the CHANGES program. Two evaluations will be conducted during this cycle. The total statewide budget for both studies is \$420,600. The first of the 2 was completed in 2023 and cost a total of 245,011. SCE pays 30% if the study cost. The budget for the second evaluation is \$175,500. SCE has not yet been billed for the second evaluation.

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

**CARE Program Table 8 - CARE and Disadvantaged Communities Enrollment Rate for Zip
Southern California Edison
Through August 2024**

Total CARE Households Enrolled				
Month	CARE Enrollment Rate for Zip Codes that have 10% or more disconnections ^[1]	CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG) ^[2]	CARE Enrollment Rate for Zip Codes in High Poverty (with 70% or Less CARE Penetration)	CARE Enrollment Rate for DAC (Zip/Census Tract) Codes in High Poverty (with 70% or Less CARE Enrollment Rate) ^[3]
January	36%	89%	42%	55%
February	36%	90%	42%	55%
March	37%	90%	42%	55%
April	36%	90%	42%	55%
May	37%	91%	43%	56%
June	37%	90%	42%	56%
July	37%	92%	43%	57%
August	37%	92%	43%	57%
September				
October				
November				
December				

^[1] Disconnections are based on previous calendar year.

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

^[3] DACs are defined at the census tract level. Corresponding zip codes are provided for the purpose of this table; however, the entire zip code listed may not be considered a DAC.

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

**CARE Table 9 - CARE Top 10 Lowest Enrollment Rates in High Disconnection, High Poverty, and DAC
by Zip Code
Southern California Edison
Through August 2024**

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes that have 10% or more Disconnections ^[1]
92552	2%
92661	12%
92581	29%
92660	30%
92657	30%
92220	34%
93255	38%
91769	39%
92347	40%
93518	41%

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG) ^[2]
92266	11%
92617	11%
92341	13%
93208	22%
93260	23%
92403	24%
93519	27%
93554	27%
93207	31%
93528	37%

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in DAC ^{[3][4]}
93260	23%
93554	27%
93519	27%
93207	31%
93528	37%
93265	47%
93285	50%
92347	51%
92225	65%

^[1] Disconnections are based on previous calendar year.

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

^[3] DACs are defined at the census tract level. Corresponding zip codes are provided for the purpose of this table; however, the entire zip code listed may not be considered a DAC.

^[4] Only 9 zip codes meet the criterias: 1) >25% of customers with incomes less than 100% FPG 3) Enrollment rate of >70%, 4) DAC.

NOTES:

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

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

**FERA Program Table 1 - Program Expenses
Southern California Edison
Through August 2024**

	Authorized Budget ^[1]	Current Month Expenses	Year to Date Expenses	% of Budget Spent YTD
FERA Program:	Electric	Electric	Electric	Electric
Outreach	\$ 800,244	\$ (137)	\$ 136,832	17%
Processing / Certification Re-certification	\$ 403,858	\$ 10,205	\$ 65,956	16%
Post Enrollment Verification	\$ 127,534	\$ 1,234	\$ 6,342	5%
IT Programming	\$ 30,000	\$ 45,725	\$ 87,616	292%
Pilot(s)	\$ -	\$ -	\$ -	0%
Studies	\$ 24,000	\$ -	\$ -	0%
Regulatory Compliance	\$ 15,905	\$ -	\$ -	0%
General Administration	\$ 45,724	\$ 5,188	\$ 31,545	69%
CPUC Energy Division	\$ 4,375	\$ -	\$ -	0%
SUBTOTAL MANAGEMENT COSTS	\$ 1,451,640	\$ 62,215	\$ 328,291	23%
FERA Rate Discount	\$ 46,164,249	\$ 2,034,804	\$ 9,773,019	21%
DISCOUNTS	\$ 47,615,889	\$ 2,097,020	\$ 10,101,310	21%
Indirect Costs		\$ 6,354	\$ 47,970	

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

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

FERA Program Table 2 - Enrollment, Recertification, & Attrition
Southern California Edison
Through August 2024

	New Enrollment										Recertification							Enrollment		Total FERA Participants	Estimated FERA Eligible ^[6]	Enrollment Rate % (W/X)			
	Automatic Enrollment				Self-Certification (Income or Categorical)						Total New Enrollment ^[7] (E+J)	Scheduled	Non-Scheduled	Automatic	Total Recertification (L+M+N)	No Response ^[4]	Failed PEV	Failed Recertification	Other ^[5,7]				Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)
	Inter-Utility ^[1]	Intra-Utility ^[2]	Leveraging ^[3]	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																
January	2	0	0	2	531	36	122	1	690	692	15	8	2	25	51	0	2	215	268	960	424	30,821	211,756	15%	
February	1	0	0	1	487	19	100	0	606	607	27	10	31	68	41	0	0	331	372	979	235	31,056	211,756	15%	
March	0	0	0	0	479	65	90	1	635	635	55	12	58	125	98	0	0	349	447	1,082	188	31,244	211,756	15%	
April	1	0	0	1	436	45	115	1	597	598	10	13	3	26	137	0	1	416	554	1,152	44	31,288	211,756	15%	
May	0	0	0	0	419	68	84	0	571	571	22	13	0	35	24	0	1	256	281	852	290	31,578	211,756	15%	
June	0	0	0	0	446	49	75	0	570	570	44	55	0	99	150	1	5	616	772	1,342	-202	31,376	211,756	15%	
July	0	2	0	2	750	53	91	0	894	896	94	101	36	231	223	2	7	204	436	1,332	460	31,836	211,756	15%	
August	0	1	0	1	1,059	144	163	0	1,366	1,367	193	96	150	439	428	0	9	588	1,025	2,392	342	32,178	211,756	15%	
September																									
October																									
November																									
December																									
YTD Total	4	3	0	7	4,607	479	840	3	5,929	5,936	460	308	280	1,048	1,152	3	25	2,975	4,155	10,091	1,781	32,178	211,756	15%	

^[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] Includes customers who requested to be removed, deceased, and customers who moved out.

^[6] Based on the Annual Estimates of CARE and FERA Eligible Customers and Related Information filed on April 15, 2024.

^[7] SCE is currently investigating the new enrollments and drop-offs and will update the data once we identify the issue.

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

**FERA Program Table 3A - Post-Enrollment Verification Results (Model)
Southern California Edison
Through August 2024**

Month	Total FERA Households Enrolled	Households Requested to Verify ^[3]	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible) ^[1]	Total Households De-enrolled ^[2]	% De-enrolled through Post Enrollment Verification	% of Total FERA Households De-enrolled
January	30,821	81	0.3%	30	0	30	37.0%	0.1%
February	31,056	50	0.2%	0	0	0	0.0%	0.0%
March	31,244	88	0.3%	38	2	40	45.5%	0.1%
April	31,288	13	0.0%	1	0	1	7.7%	0.0%
May	31,578	10	0.0%	0	0	0	0.0%	0.0%
June	31,376	124	0.4%	71	2	73	58.9%	0.2%
July	31,836	14	0.0%	0	0	0	0.0%	0.0%
August	32,178	1	0.0%	0	0	0	0.0%	0.0%
September								
October								
November								
December								
YTD Total	32,178	381	1.2%	140	4	144	37.8%	0.4%

^[1] Includes customers verified as over income or who requested to be de-enrolled.

^[2] Verification results are tied to the month initiated. The 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.

^[3] D.19-07-015 established a permanent set of emergency disaster customer protection measures that the utilities are mandated to implement in the event of a declared emergency. In response to the mandated customer protections, SCE has implemented a CARE post-enrollment verification (PEV) freeze to low-income customers impacted by the California emergencies / events for a period of one year commencing from the date the Governor of California issued an emergency proclamation due to a disaster. Applicable to April 2023 reporting and beyond. Number of requests updated to exclude customers exempted due to emergency disaster protections.

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

FERA Program Table 3B Post-Enrollment Verification Results (Electric only High Usage)
Southern California Edison
Through August 2024

Month	Total FERA Households Enrolled	Households Requested to Verify ^[3]	% of FERA Enrolled Requested to Verify Total	FERA Households De-enrolled (Due to no response)	FERA Households De-enrolled (Verified as Ineligible) ^[1]	Total Households De-enrolled ^[2]	% De-enrolled through Post Enrollment Verification	% of Total FERA Households De-enrolled
January	30,821	3	0.0%	2	0	2	66.7%	0.0%
February	31,056	1	0.0%	1	0	1	100.0%	0.0%
March	31,244	5	0.0%	3	0	3	60.0%	0.0%
April	31,288	3	0.0%	2	0	2	66.7%	0.0%
May	31,578	0	0.0%	0	0	0	0.0%	0.0%
June	31,376	1	0.0%	0	0	0	0.0%	0.0%
July	31,836	1	0.0%	0	0	0	0.0%	0.0%
August	32,178	0	0.0%	0	0	0	0.0%	0.0%
September								
October								
November								
December								
YTD Total	32,178	14	0.0%	8	0	8	57.1%	0.0%

^[1] Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

^[2] Verification results are tied to the month initiated. The process allows customers 45 days to respond to the verification request. Results may be pending due to the time permitted for a participant to respond.

^[3] D.19-07-015 established a permanent set of emergency disaster customer protection measures that the utilities are mandated to implement in the event of a declared emergency. In response to the mandated customer protections, SCE has implemented a CARE post-enrollment verification (PEV) freeze to low-income customers impacted by the California emergencies / events for a period of one year commencing from the date the Governor of California issued an emergency proclamation due to a disaster. Applicable to April 2023 reporting and beyond. Number of requests updated to exclude customers exempted due to emergency disaster protections.

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

**FERA Program Table 4 - Enrollment by County
Southern California Edison
Through August 2024**

County	Estimated Eligible Households ^[1]			Total Households Enrolled ^[2]			Enrollment Rate ^[3]		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Fresno	95	0	95	3	0	3	3%	0%	3%
Imperial	0	8	8	0	0	0	0%	0%	0%
Inyo	1	188	189	0	28	28	0%	15%	15%
Kern	1,652	2,137	3,789	283	244	527	17%	11%	14%
Kings	0	1,581	1,581	1	231	232	238%	15%	15%
Los Angeles	84,267	469	84,736	11,565	113	11,678	14%	24%	14%
Madera	0	0	0	0	0	0	0%	0%	0%
Mariposa	0	0	0	0	0	0	0%	0%	0%
Mono	0	548	548	0	32	32	0%	6%	6%
Orange	30,616	0	30,616	4,873	0	4,873	16%	0%	16%
Riverside	15,529	15,194	30,723	2,536	3,245	5,781	16%	21%	19%
San Bernardino	32,275	6,871	39,146	5,200	907	6,107	16%	13%	16%
San Diego	0	0	0	0	0	0	0%	0%	0%
Santa Barbara	2,206	0	2,206	212	0	212	10%	0%	10%
Tulare	1,929	5,818	7,747	247	892	1,139	13%	15%	15%
Ventura	10,019	351	10,370	1,502	64	1,566	15%	18%	15%
Total	178,591	33,165	211,756	26,422	5,756	32,178	15%	17%	15%

^[1] Based on the Annual Estimates of CARE and FERA Eligible Customers and Related Information filed on April 15, 2024.

^[2] Total Households Enrolled includes submeter tenants.

^[3] Penetration Rate and Enrollment Rate are the same value.

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

**FERA Program Table 5 - Recertification Results
Southern California Edison
Through August 2024**

Month	Total CARE Households	Households Requested to Recertify ^{[1][2][5]}	% of Households Total (C/B)	Households Recertified	Households De-enrolled ^[3]	Recertification Rate % ^[4] (E/C)	% of Total Households De-enrolled (F/B)
January	30,821	75	0.2%	28	33	37.3%	0.11%
February	31,056	52	0.2%	5	27	9.6%	0.09%
March	31,244	148	0.5%	9	123	6.1%	0.39%
April	31,288	330	1.1%	23	231	7.0%	0.74%
May	31,578	628	2.0%	52	367	8.3%	1.16%
June	31,376	1,096	3.5%	84	214	7.7%	0.7%
July	31,836	1,361	4.3%	108	17	7.9%	0.1%
August	32,178	762	2.4%	35	3	4.6%	0.0%
September							
October							
November							
December							
YTD	32,178	4,452	13.8%	344	1,015	7.7%	3.15%

^[1] Excludes count of customers recertified through the probability model.

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

^[3] Includes customers who did not respond or who requested to be de-enrolled. Does not include customers who were de-enrolled due to other reasons such as moved out, no response/failed verification, deceased, and etc.

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

^[5] D.19-07-015 established a permanent set of emergency disaster customer protection measures that the utilities are mandated to implement in the event of a declared emergency. In response to the mandated customer protections, SCE has implemented a CARE post-enrollment verification (PEV) freeze to low-income customers impacted by the California emergencies / events for a period of one year commencing from the date the Governor of California issued an emergency proclamation due to a disaster. Number of requests updated to exclude customers exempted due to emergency disaster protections.

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

FERA Program Table 6 - Capitation Agencies^[1]
Southern California Edison
Through August 2024

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
2-1-1 ORANGE COUNTY		x			-	-
ALPHA ENTERPRISES		x			-	-
APAC SERVICE CENTER	x				-	-
ARMENIAN RELIEF SOCIETY	x				-	-
ASIAN AMERICAN DRUG ABUSE PROG	x				-	-
ASIAN AMERICAN RESOURCE CENTER	x		x		-	2
ASIAN YOUTH CENTER	x				-	-
BEST PARTNERS	x				-	-
BETHEL BAPTIST CHURCH	x				-	-
BISHOP PAIUTE TRIBE	x				-	-
C.O.R. COMM DEVELOPMENT CORP	x				-	-
CAREGIVERS VOLUNTEERS ELDERLY		x			-	-
CHINESE CHRISTIAN HERALD CRUS.	x				-	-
CHINO NEIGHBORHOOD HOUSE		x			-	-
CITIHOUSING REAL ESTATE SERVIC		x			-	-
CITY IMPACT	x				-	-
CITY OF BEAUMONT SENIOR CENTER		x	x		-	-
COMMUNITY HEALTH INITIATIVE of OC		x			-	-
DELHI CENTER	x				-	-
DESERT COMMUNITY ENERGY		x			-	-
DESERT MANNA MINISTRIES INC	x				-	-
DISABLED RESOURCES CTR, INC		x	x		-	-
EL CONCILIO DEL CONDADO DE	x		x		-	-
FAMILY SVC ASSOC OF REDLANDS	x				-	-
FOOD SHARE	x				-	-
GO THE CALENDAR		x			-	-
GRID ALTERNATIVES INLAND EMPIRE INC			x		-	-
HELP OF OJAI, INC.	x				-	-
HOUSING AUTHORITY OF KINGS CO	x		x		-	-
INLAND SOCIAL 211+	x	x			-	-
KERNVILLE UNION SCHOOL DISTRIC	x				-	-
KINGS COMMUNITY ACTION ORG	x				-	-
KINGS CTY COMMISSION ON AGING	x				-	-
LA COUNTY HOUSING AUTHORITY		x			-	-
LEAGUE OF CALIF HOMEOWNERS	x				-	-
LIFT TO RISE	x				-	-
LTSC COMM. DEVEL. CORP	x				-	-
MENIFEE VALLEY CHAMBER OF COMMERCE		x			-	-
MEXICAN AMERICAN OPPORTUNITY		x	x		-	-
MTN COMM FAM RESOURCE CNTR	x				-	-
NEW GREATER CIR. MISSION, INC	x				-	-
NEW HOPE VILLAGE, INC	x				-	-
NEW HORIZONS CAREGIVERS GROUP		x			-	-
OCCC	x				-	-
OPERATION GRACE	x				-	-
OUR COMMUNITY WORKS	x				-	-
PACIFIC ISLANDER HLTH (PIHP)	x				-	-
PACIFIC PRIDE FOUNDATION	x				-	-
PRM CONSULTING, INC.	x	x	x		-	1
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					-	3

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

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