

**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 SEPTEMBER 2024**

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Dated: October 21, 2024

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**MONTHLY REPORT OF SOUTHERN CALIFORNIA EDISON COMPANY (U 338-E)
ON LOW INCOME ASSISTANCE PROGRAMS FOR SEPTEMBER 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 September 30, 2024.

Respectfully submitted,

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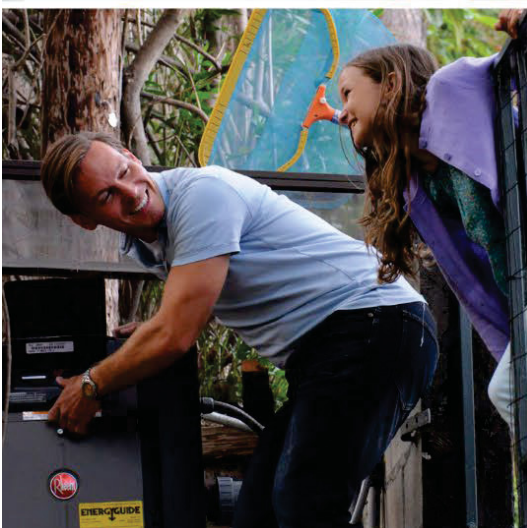
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Attachment A

ESA, CARE, and FERA Programs Report

September 2024



Southern California Edison

September 2024 Monthly Report for

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

October 21, 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**

September 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 September 30, 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 the CARE and Low-Income Energy Efficiency (now ESA) programs 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 D.21-06-015.

ESA Main (SF, MH) Program Summary Expenses for 2024			
	2024 Authorized / Planning Assumptions²	Actual to Date³	%
Budget ^{4,5}	\$ 59,458,992	\$ 36,312,510	61%
Homes Treated	64,922	29,876	46%
kWh Saved	31,762,240	14,547,918	46%
kW Demand Reduced	12,681	2,757	22%
Therms Saved	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

² Authorized ESA budget, energy savings goals and household treatment target 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.

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 Nine million dollars in advance payments paid to ESA contractors is not included in the total expenses. See SCE Advice 5278-E submitted April 19, 2024.

both homeowners and renters. Renters must have the homeowner's written permission before receiving certain program measures and services.

There are three stages in the ESA Main program. Each stage is delivered by an SCE-approved contractor. First, the enrollment and assessment stage occur when an ESA contractor confirms the customer's income eligibility and does a walk-through of the home to collect information to help SCE determine the potential for installation of one or more appliances or services. Second, the installation stage occurs when the appliances are delivered, replaced, and installed. 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 September 30, 2024, SCE has spent 61% 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 September 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.

There continues to be a slight decrease in the monthly number of homes treated in September as compared to August. Several factors continue to impact the program activity. 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 taking steps to increase productivity, serve more customers, and maximize 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 twelfth monthly report to the service list on September 6, 2024. The report presented year-to-date ESA program results and expenditures for calendar year 2024 up to and including August 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 issued advance payments to 14 contractors totaling nine million dollars, which represent all contractors that accepted the terms of the Letter Agreement. Monthly repayments started in September 2024 and will continue through December 2026. All contractors submitted the first monthly payment on time. Through September 2024, a total of \$322,142.90 was repaid. 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. For a detailed breakdown of SCE's Contractor Advanced Funding and Repayment Schedule, see ESA Table 10 in Appendix A.

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. SCE will continue to actively solicit contractor feedback prior to the forums to gather agenda items that contractors would like to discuss.

ESA Program Administrative Expenses for 2024		
	Current Month	YTD
Administrative Expenses	\$ 302,474	\$ 2,331,763
Total Program Costs	\$ 4,673,216	\$ 36,312,510
% of Administrative Spend	6%	6%

Administrative expenses are capped at no more than 10% of the program costs starting in program year 2024. As of September 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>

MFWB (In-Unit, WB) Summary Expenses for 2024			
	2024 Authorized / Planning Assumptions	Actual to Date	%
Budget ⁶	\$ 15,784,061	\$ 1,265,932	8%
Properties Treated	80	0	0%
Homes Treated (in Unit)	15,359	1008	7%
kWh Saved	10,561,043	254,452	2%
kW Demand Reduced	0	6	0%
Therms Saved	0	4,725	0%
GHG Emissions Reduced (Tons)	N/A	N/A	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

⁶ Budget does not include budget and spend allocated to Single Point of Contact (SPOC).

specific budget and planning assumptions unique to SCE and actual figures accumulated year-to-date for the Southern MFWB program. SCE contributes 31% of total program funding; however, by the end of September, work performed for SCE's multifamily customers accounted for 22% of direct implementation costs.

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 Assumptions ⁷	Actual to Date	%
Budget	\$ 3,884,864	\$ 507,599	13%
Homes Treated	915	21 ⁸	2%
kWh Saved	0	32,593	0
kW Demand Reduced ⁹	0	10.02	0
Therms Saved	0	2,025	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

⁷ 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.

⁸ 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.

⁹ Decrease in kW savings is due to a recalculation of the August reported savings.

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

As of September 30th, 2024, there are 526 customers who have expressed interest in the program and enrolled.¹⁰ From inception to date, the average cost per treated home is \$14,621.50.

Maroma is currently undergoing system changes and data clean-up efforts are ongoing. They are currently building reporting processes that will ensure accurate clean data in future. There will be an interim period where numbers will be denoted with exception cases as seen last month, when SCE discovered that for certain Pilot Deep measures deemed savings were used instead of modeled savings. The pilot implementer, Maroma, revised the calculated savings for this 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**

¹⁰ 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	\$ 1,434,414	14%
Homes Treated ¹¹	N/A	66	0
kWh Saved	N/A	(177,540)	0
kW Demand Reduced	N/A	0	0
Therms Saved	N/A	26,016	0
Claimable kWh Saved ¹²	N/A	584,729	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 final documentation. Further details regarding BE pilot activities performed in

¹¹ The Homes Treated number represents the number of projects that had the final verification performed by SCE in 2024.

¹² 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>.

September 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	\$ 439,975	25%
Homes Treated ¹³	N/A	N/A	N/A
kWh Saved ¹⁴	N/A	N/A	N/A
kW Demand Reduced ¹⁴	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 Catalina Island, Long Beach, Vernon, and portions of Inyo and Mono counties. The CEH pilot is also available to properties or buildings that do not

¹³ 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 this monthly report within ESA Table 2D, 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 lessened from 19 to 14 total projects as of September 2024. SCE, along with the Implementer, developed a Strategic Action Plan to enhance pilot performance. The decrease was due to five total projects that were determined not to be eligible for the pilot this 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 continue to collaborate with the outreach team to deliver direct presentations to developers on all-electric design practices, aiming to stimulate greater program engagement. The plan set documentation received through Interest Forms have only contained architectural plans and do not have electrical

or plumbing included. Once the additional plans have been received, a second design review is planned for the near future.

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.¹⁴

SCE made no such program measure changes to all the programs and pilots in September 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. This year, ESA's marketing strategies have proven highly effective, driving thousands of customer leads to the program. SCE is temporarily pausing some marketing efforts to focus on converting these leads into enrollments and closely monitoring the pipeline. To

¹⁴ D.21-06-015 at 486, OP 69.

manage the large pipeline, SCE is developing new communications to keep customers informed and engaged, aiming to enhance the customer experience and reduce call center traffic. Additionally, SCE is collaborating with contractors to ensure prompt service for customers in the pipeline.

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 3,300 customers into the program in September.¹⁵ 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 September, the Southern MFWB implementer, RHA, enrolled 34 new properties, assessed 13 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 292 properties, assessed 243 properties, treated 4,093 tenant units, and completed four Common Area projects. To date, RHA has completed 116 property enrollments, 101 property assessments, and 1,008 units within SCE's service area. However, RHA has not completed any Common Area projects in SCE's territory.

By the end of September, RHA reported a pipeline of 1,642 qualified property-level leads and 29,310 enrolled tenant units. Currently, there are 249

¹⁵ 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."

Common Area/Whole Building projects that are in various stages of development. To further explain, once a property is assessed, 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. The current average timeframe for a property-level lead to progress into a completed Common Area/Whole Building project is approximately 11 months.

RHA conducted 4,972 customer interactions via their call center in the month of September, 36% of callers were identified as SCE customers. RHA did not participate in any formal marketing events in September, opting to focus on targeted outreach. Throughout the reporting month, 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. SCE's SPOC attended the Reimagine Realtor Expo on September 25-26th in Long Beach. MFWB program information was shared with several interested properties, including multifamily property owners and representatives. By the end of September, SCE provided RHA with 53 property leads, 541 residential leads, 1,049 deed-restricted property level prospects, and 16 SOMAH referrals in 2024. In September, SCE's SPOC also shared lead lists, totaling 220 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. At this time, direct mailers have been paused until a new customer list is made available to Maroma. Door-to-Door marketing has been increasingly successful when paired with the co-branded marketing materials. Feedback from customers with this marketing approach provides legitimacy and more willingness to learn more about the pilot resulting in an enrollment to the pilot.

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, with an eighth contractor currently being on-boarded. 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 526¹⁶ homes enrolled since pilot launch. The current fall-out rate after a customer expresses interest in the program is 20%, a 1 percent increase from last month.

SCE and SoCalGas continue to look at ways to improve program enrollment. In Q3, 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 September 30, 2024

Project Status	Number of Homes
In Progress (<i>Enrollment phase</i>)	398
Pending Approval (<i>Enrolled, Pending Review and Approval</i>)	0
Enrolled/Installed (<i>Audit, Savings Verified, Treated, Testing, and Permits</i>)	41

¹⁶ 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.


Completed (Invoiced)	18
De-Enrolled (<i>Min Savings not met, Refused to Participate, Exceeds Mitigation cap</i>)	105

ESA Building Electrification Pilot


In September 2024, SCE launched two email campaigns to enhance customer engagement and drive program participation. The first email campaign (*See Sample of BE Pilot Email*) launched between September 12th and September 15th. This campaign targeted approximately 28,000 customers, delivering a message designed to inform and call for action.

The results were positive with a 50% open rate, out of the 28,000 recipients, approximately 14,000 customers opened the email. However, only 700 customers took the next step by clicking on either the “Apply Now” or “Learn More” button. To maintain momentum and keep customers engaged, a follow-up email was sent between September 26th and September 28th. This email aimed to reinforce the initial campaign’s message and provide information to encourage those who had not yet taken action to do so.

Sample of BE Pilot Email



**GO ELECTRIC
AT NO COST**




Dear Valued Customer,

Southern California Edison (SCE) offers income-qualified homeowners and renters the opportunity to upgrade from gas appliances to high-efficiency electric technologies at no cost.*

The Building Electrification Program covers all equipment and installation costs for customers with qualifying single-family homes. Funding is limited, and services are offered on a first-come, first-served basis while funds last, so don't wait!


Don't miss out on high-efficiency home upgrades!

[Apply Now](#)



Home upgrades may include:

- Heat Pump Heating, Ventilation, and Air Conditioning (HVAC) system
- Heat Pump Water Heater
- Induction Cooking Appliance
- Electric Clothes Dryer
- Weatherization measures
- And more!



SCE has contracted MAROMA Energy Services to implement the Building Electrification (BE) Program. MAROMA and its network of service providers will guide you and manage each step of your project. The BE Program is available to income-qualified customers with eligible single-family homes while funds last.

[Learn More](#)

Sincerely,
Veronica Saakyan
Veronica Saakyan
Principal Manager, Building Electrification and Income Qualified Programs
Southern California Edison

**DO MORE AT
SCE.COM**

Pay Your Bill Stay Safe	View/Report Outages Go Paperless	Turn On/Off Service Outage Alerts
----------------------------	-------------------------------------	--------------------------------------

[Privacy Notice](#) | [Contact Us](#)

*Participants do not pay for the costs of the home assessment, new high-efficiency electric equipment, or installation by an authorized contractor.

The Building Electrification Program is funded by California utility ratepayers under the auspices of the California Public Utilities Commission and is implemented by MAROMA Energy Services through a contract with SCE. Eligibility requirements apply and Program services are offered on a first-come, first-served basis until funds are no longer available at the Program.

On September 26, SCE conducted a training session focused on residential rates. This training covered a range of topics, including the various tiered and time-of-use rates, baseline allowances, and how different rate structures impact energy costs and customer behavior. The session also provided insights into solar rates, helping contractors understand how solar energy affects customer billing and overall energy consumption.

Additionally, SCE invited the implementer to attend the Self-Generation Incentive Program (SGIP) 3rd Quarter Workshop. This workshop provided information on the latest developments and opportunities within SGIP, including the updated incentive levels for storage and solar paired with storage.

SCE continues to collaborate with the implementer 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 66 homes treated in 2024.

Table 1: ESA BE Pilot Progress through September 30, 2024

Project Status	Number of Homes
Enrollment phase (e.g., home assessment, scope development, etc.)	134
Installation in-progress (e.g., procuring equipment and permit, electrical upgrade, etc.)	148
Installations complete, pending final documentation (e.g., completing Title 24, permit inspection, etc.)	45
Subtotal	327
Homes Treated	66
TOTAL	393

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 September 2024, SCE continued to collaborate with the Implementer to execute the targeted three-month Strategic Action Plan that was developed to address low program enrollment. This plan refocuses outreach efforts to increase pilot participation. The outreach team has been focusing on meeting with parties who have expressed interest but have not yet submitted any Interest Forms. There were zero new interest forms and zero new design incentive applications submitted in September. There are a total of three applications for design incentives under review. The focus in September was on reviewing applications and previously submitted interest forms. Outreach efforts were revamped for direct contact, there is one potential project who has not submitted an Interest Form. SCE and the implementer will meet with that team in October 2024.

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 five potential projects. The team continued to prioritize outreach and will follow a standard process of two emails and one phone call over a three-week period.

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 September.

Language	Number of Calls
Mandarin	1
Vietnamese	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 September, the SCE Tribal team was actively involved in key community engagements, including the monthly Morongo Confab and Southern California's Tribal Emergency Managers' meetings.

To date, SCE has participated in 28 events. The following tribes are currently engaged in the mini-grant program for 2024: 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, SCE's Local Public Affairs launched the @weavingenergy24 podcast to discuss energy-related topics and educate local tribal communities. In September, no podcasts were held.

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

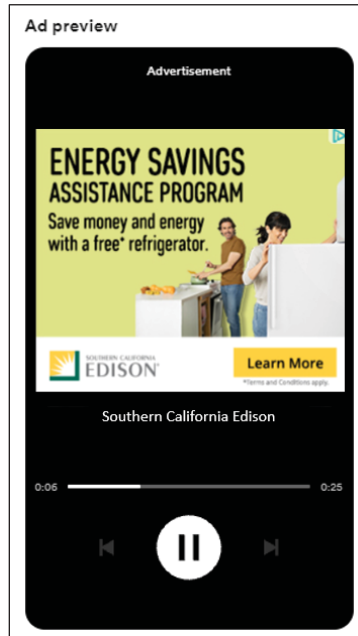
Online Advertising, Social Media, & Radio

SCE deployed a multifaceted media campaign including social media, paid search, programmatic banner advertisements and audio/radio streaming. The campaigns continued 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.

Paid social and programmatic display advertisements were paused on September 1, 2024, while paid search was paused September 6, 2024. ESA/FERA audio/radio launched in June and delivered over 600,000 impressions year to date and ran through September 15, 2024. SCE is reassessing our marketing strategy to adjust to the high demand and customer interest received.

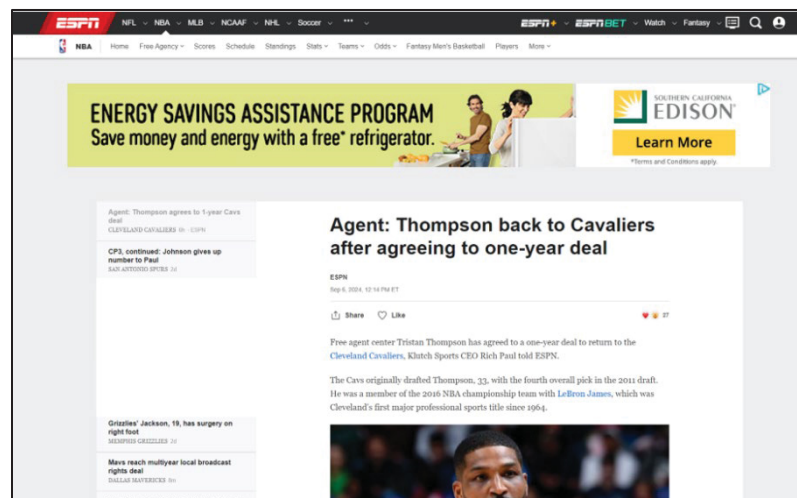
Example of IQP Media Campaign – Audio Streaming:

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.

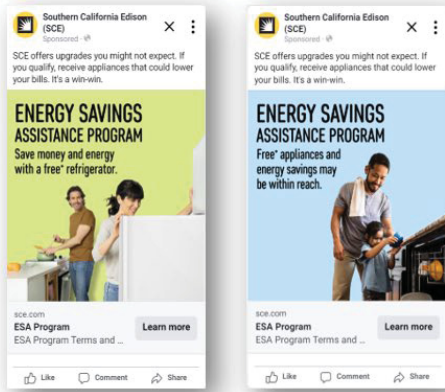
Example of IQP Banner Advertisement



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

ESA PAID SOCIAL

ENGLISH & SPANISH AD UNITS



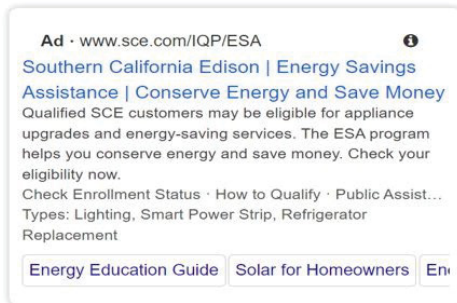
English



Spanish

ESA PAID SEARCH

ENGLISH & SPANISH AD EXAMPLES



English



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 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.

In response to the large pipeline, SCE developed an email communication with the goal to keep pipeline customers informed, maintain lead engagement, enhance the customer experience, and reduce call center traffic. SCE is planning on sending these communications to customers at the end of October 2024. SCE is working with our marketing agency on the logistics.

Direct Mail

SCE is also temporarily pausing direct mail marketing efforts to focus on converting these leads into enrollments and closely monitoring the pipeline.

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.

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/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 reciben, y puedes verificar su estado en cualquier momento en línea en sce.com/es/esa.

⁴The 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 services 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.

⁵Energy 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 cumplan 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 reciben 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 Assistance
AHORRA ENERGÍA Y DINERO CON ELECTRODOMÉSTICOS DE CONSUMO EFICIENTE GRATUITOS*

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-savings 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 disfrutan gracias a sus nuevos electrodomésticos gratuitos que recibieron a través del programa Energy Savings Assistance de SCE. Visita energized.edison.com/stories.

©2024 Southern California Edison.

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 cost⁴.

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/2022-01/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 alguno⁴.

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>

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.

Multicultural Outreach

On September 27, SCE hosted its 14th Hispanic Heritage Month Celebration, “Fostering Thriving Communities,” by honoring individuals and organizations making a significant impact in our communities.

SCE leadership, including CEO Pedro Pizarro and Chief Customer Officer Funmi Williamson, recognized three influential partners in the clean energy transition: ActiveSGV, Cordoba Corporation, and Jurupa Unified School District.

The event presentations and discussions emphasized the importance of allyship, educating the community on available resources, and highlighting opportunities within Latino communities.

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

Other Customer Engagement Efforts

September Event Highlight:

On September 28, the Community & Climate Equity team hosted Customer Empowerment Day at the Center of Hope Church in Inglewood. This event provided an opportunity for direct engagement with approximately 100 community members in attendance. SCE arranged for an ESA contractor to attend the event to allow for the scheduling of appointments directly with customers during the event.

These events are vital for fostering meaningful connections and delivering tangible benefits to our customers. Some of the key programs and services highlighted included: Demand Response Programs, Income-Qualified Programs (CARE, FERA, ESA, AMP and MBL), Electric Vehicle (EV) initiatives, Solar options, and bill support services.

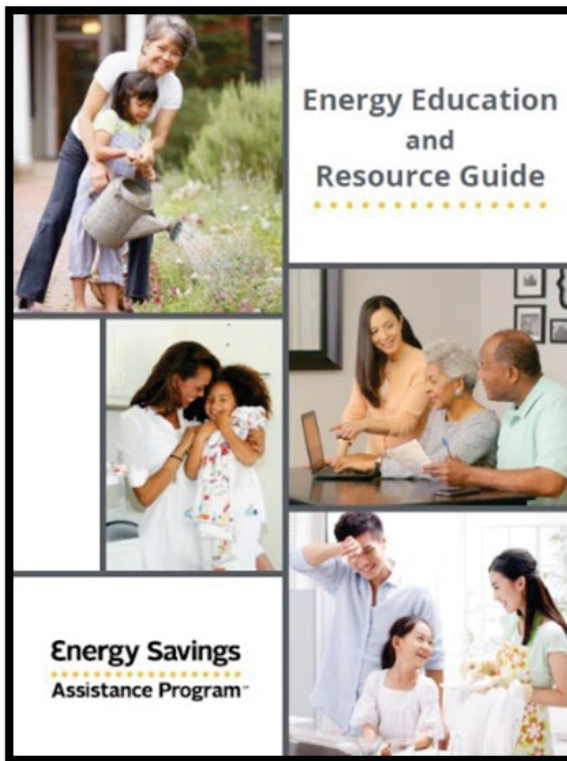
Customer Contact Center (CCC), Branch Offices, and Payment Offices

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 September, SCE received over 1,000 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. SCE provided GRID Alternatives three customer referrals in September.

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 September 2024, four contractors submitted reimbursement requests to TECH for 37 HPWH and HP-HVAC installations combined. 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. On September 30, 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 53 courses for contractors and vendors. Some examples of the courses offered during this period include the following:

Course Title	Date
2022 Title 24 Requirements for Nonresidential Lighting	9/13/2024
Debunking Electrification Myths Addressing Misconceptions about BE	9/20/2024
2022 Title 24 Requirements for Residential Lighting	9/27/2024

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 September 2024, about 823 individuals from these organizations support SCE’s ESA program. Also, as of September 30, 2024, SCE has about 49 active ESA program representatives approved to conduct virtual (not in-person) enrollment and assessment activities.

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 September 2024, the group of ten students, who initiated their academic journey on July 31, 2024, and recently concluded their hands-on training in September from the sixth class, have officially graduated. A seventh class with ten students enrolled began on October 7, 2024, and is scheduled to be completed on December 5, 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 September. 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. 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.

In October 2023, as required by D.21-06-015, the IOUs submitted a Joint Advice Letter (SCE AL 5122-E), based on key findings and the recommendations of the independent evaluation consultant. The Advice Letter was rejected by CPUC on September 6, 2024.

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 pretested several versions of the questions in September and will continue 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.

Illume has concluded early participant interviews with customers who had varying levels of engagement with the pilot. In late August, Illume issued a memo with key findings from these early participant interviews in order to provide fast feedback to SCE, SoCalGas, and Maroma to support operational improvements which will better serve customers. The following highlights some key findings:

- Awareness of pilot and motivation to participate:
 - More than half learned about pilot through in person visit.
- Interactions with pilot staff:
 - Overall positive comments about experience.
- Barriers to participation and pain points:
 - Several interviewees struggled to gather 12 months of utility bills, and
 - Some interviewees had multiple inspections and follow-up visits from various companies and government agencies, and the number of visits seemed to be disruptive for customers.

- Conditions of home prevented participants from getting upgrades installed by the pilot (lack of building permits on pre-existing work).
- Nearly all participants were happy with the pilot and improvements made.

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.

The research team is pleased to report the following September process and impact research milestones:

1. Completed fielding nonparticipant survey.
2. Sent incentives to survey respondents.
3. Began survey data analysis and reporting.
4. Developed early findings from the nonparticipant survey to share with utilities and Maroma.
5. Responded to SCE questions regarding inclusion of a PSPS zone flag in the eligible customer list.
6. Developed impact evaluation data request and brief description of the participation analysis. Requested data files by 10/18/2024.
7. Drafted case study based on the experiences of one of the interviewed participants.
8. Drafted slide deck of early findings from the nonparticipant survey analysis.

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. In September, the team evaluated the results of the preliminary analysis for 10 customers and screened the electricity and gas usage data estimated by the tool to better understand the analysis methodology. 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.

September activities included implementing the updated focus on understanding lower than expected participation. One notable outcome in September was collaboration between the implementer and the evaluation team to provide support for the new focus. The team may request samples from various stages of participation from the implementer and is considering providing the Research Workplan to the implementation team to guide their support for the evaluation refresh.

The research team are also considering additional sample from developers that filled out the interest form and then decided not to move forward with the pilot. Additional follow-up discussions occurred throughout September to support

this expanded research objective, and the team continues to provide outreach in support of this 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	\$ 1,746,322	47%
Processing, Certification and Verification	\$ 1,615,434	\$ 1,414,512	88%
Post Enrollment Verification	\$ 510,137	\$ 144,108	28%
Information Tech/Programming	\$ 570,000	\$ 130,651	23%
CHANGES Program	\$ 525,000	\$ 195,533	37%
Studies & Pilots	\$-	\$-	0%
Measure & Evaluation	\$ 36,000	\$ (764)	-2%
Regulatory Compliance	\$ 493,041	\$ 248,653	50%
General Administration	\$ 1,417,444	\$ 1,505,631	106%
CPUC Energy Division	\$ 135,625	\$ 7,953	6%
Total Expenses	\$ 9,002,553	\$ 5,392,599	60%
Subsidies and Benefits	\$ 415,120,450	\$ 657,365,264	158%
Total Program Costs & Discounts	\$ 424,123,003	\$ 662,757,864	156%

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 Participants¹⁷	Enrollment Rate
1,360,030	1,302,665	104%

During the September review of enrollments and disenrollments, SCE discovered a potential issue that could impact the reported figures. SCE is continuing its investigation to determine the cause of the issue with the goal to resolve; once the root cause has been found and correction made, 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**

¹⁷ 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 Electricity Services (CHANGES) program, which assists customers with limited English proficiency (LEP) through Community-Based Organizations (CBOs), has encountered challenges when contacting SCE on behalf of these customers.

In September, SCE identified multiple opportunities to improve its CHANGES program. Primarily, SCE will be introducing new training for SCE call center agents that will encourage smoother interactions between SCE, CHANGES CBOs, and LEP customers. In some cases, SCE representative will require SCE interpreters to be present on various calls, even though CBOs are fluent in the customer's preferred language and the customers have given permission for the CBO to translate. The new training is aimed at educating SCE agents about the role of CHANGES and how the CBO can help customer interactions broadly. Additionally, CBOs are now encouraged to reach out to the dedicated support line for CHANGES at 1-866-743-1648, where agents are trained to handle CHANGES-related issues, including payment plans.

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 September, SCE has promoted income-qualified programs at 155 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 reestablished its comprehensive and diverse CARE campaign, incorporating refreshed emails and direct mail. In September, approximately 25,000 e-mails were sent out for CARE and approximately 9,978 direct mail pieces were sent to potential CARE applicants. Below is a sample of the ongoing cross-promotion efforts with the ESA, MBL, and AMP programs. Additionally,

we are promoting other valuable assistance programs such as the Affordable Connectivity Program and California Lifeline.



EDISON CALIFORNIA
EDISON
Energy for What's Ahead®

-Date-
-Customer Name-
-Mailing Address -
-City, State Zip+4-
-BAR CODE-

A Way for Families and Households of Three or More to Save Money

Give your budget some breathing room with a monthly discount on your electric bill. With our **Family Energy Rate Assistance (FERA)** program, you can lower your electric bill by 18% every month!

Program qualifications.
Qualifying for FERA depends on your household's total combined income and number of persons in the household. See the chart at right.

Enrolling is easy.
Online: Complete application at sce.com/fera or scan the QR code.
Call: **1-800-798-5723** and follow the voice prompts.

Maximum Household Income Effective June 1, 2023	
Persons in Household	Total Combined Annual Income ¹
1 - 2	Not eligible
3	\$49,721 - \$62,150
4	\$60,001 - \$75,000
5	\$70,281 - \$87,850
6	\$80,561 - \$100,700
7	\$90,841 - \$113,550
8	\$101,121 - \$126,400
Each additional person	\$10,280 - \$12,850

¹ Current gross (before taxes) household income from all sources.

Other Money-saving Programs

Energy Savings Assistance (ESA)
You may be eligible to receive a new energy-efficient refrigerator, smart thermostat, lighting and other energy-saving products for free with our ESA program.
Apply at sce.com/esa.

Medical Baseline Allowance (MBL)
MBL helps lower energy costs if anyone in your household requires the regular use of qualifying electrically-powered medical equipment or other devices.
Apply at sce.com/mbi.

Arrearage Management Plan (AMP)
CARE/FERA customers with qualifying past-due bills may qualify for bill forgiveness through AMP.
Apply at sce.com/amp.

Take Advantage of Additional Assistance Programs

Affordable Connectivity Program
You could receive a \$30 monthly discount off fast home internet.
internetforallnow.org/applytoday

California Lifeline
Receive discounted home and cell phone services.
california lifeline.com

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

Our Commitment to Customers

We offer multiple cost-saving programs and payment plan options that are secure, accessible, and easy to understand.



EDISON CALIFORNIA
EDISON
Energy for What's Ahead®

-Date-
-Customer Name-
-Mailing Address -
-City, State Zip+4-
-BAR CODE-

A Way for Individuals, Couples, and Larger Households to Save Money

Give your budget some breathing room with a monthly discount on your electric bill. With our **California Alternate Rates for Energy (CARE)** program, you can lower your electric bill by nearly 30% every month!

Qualify either of two ways.

- Your household meets the income eligibility shown in the chart at right.
- Someone in your household participates in one of the public assistance programs listed at sce.com/care.

Enrolling is easy.
Online: Complete application at sce.com/care or scan the QR code.
Call: **1-800-798-5723** and follow the voice prompts.

Maximum Household Income Effective June 1, 2023	
Persons in Household	Total Combined Annual Income ¹
1 - 2	Up to \$39,440
3	Up to \$49,720
4	Up to \$60,000
5	Up to \$70,280
6	Up to \$80,560
7	Up to \$90,840
8	Up to \$101,120
Each additional person	\$10,280

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

Other Money-saving Programs

Family Electric Rate Assistance (FERA)
FERA helps eligible households of three or more receive an 18% discount on their electric bills.
Apply at sce.com/fera.

Energy Savings Assistance (ESA)
Eligible customers may receive new energy-efficient appliances and products for free with our ESA program. Apply at sce.com/esa.

Take Advantage of Additional Assistance Programs

Affordable Connectivity Program
You could receive a \$30 monthly discount off fast home internet.
internetforallnow.org/applytoday

California Lifeline
Receive discounted home and cell phone services.
california lifeline.com

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

Other Helpful Ways to Manage Energy Costs

Medical Baseline Allowance (MBL)
MBL helps lower energy costs for households requiring the regular use of qualifying electrically-powered medical equipment.
Apply at sce.com/mbi.

Arrearage Management Plan (AMP)
CARE/FERA customers with past-due bills may qualify for bill forgiveness through AMP.
Apply at sce.com/amp.

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

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 September, Capitation Agencies successfully enrolled 182 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.

In October, SCE will be hosting a CARE Capitation agency webinar where agencies will be briefed on CARE programs verification and recertification process, California Senate Bill 1130 (SB 1130) which recently passed that expands the eligibility for FERA, and the Fixed Charge decision.

CARE Capitation Agencies	
ESA Leads	NA
CARE Enrollments	182
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 September, 105 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 September 2024, the CARE/FERA support team(s) received seven complaints for CA; all seven were regarding the recertification process and have subsequently been resolved.

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.

The team continued to review the draft work scope, project schedule, and project quality controls for the second evaluation review in September. The release of the contract opportunity announcement is scheduled for October. This evaluation will focus on two main objectives:

1. Benchmarking Analysis: Assess the CHANGES program by comparing its services and offerings to similar programs administered by other jurisdictions and/or existing within the IOUs.

2. Market Profile Analysis: Evaluate whether the current program design and implementation approach meets customer needs or if modifications are necessary.

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 September 30, 2024, 330 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
4	07/30/2025
19	08/04/2025
1	09/03/2025

2.6 CARE Fixed Income

N/A for September 2024.¹⁸

¹⁸ 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.¹⁹

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.

In September 2024, Governor Newsom signed into law SB 1130 that will significantly change the FERA program, including the removal of household size limitations and will allow FERA to have its own stand-alone application. SCE has already begun the process(es) to implement SB 1130. It is anticipated that these changes will be enacted in the first quarter of 2025.

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	\$ 138,151	17%
Processing / Certification and Verification	\$ 403,858	\$ 75,216	19%
Post Enrollment Verification	\$ 127,534	\$ 7,572	6%

¹⁹ See Pub. Util. Code § 739.12.

Information/Tech Programming	\$ 30,000	\$ 114,775	383%
Pilots	\$ -	\$ -	0%
Studies	\$ 24,000	\$ -	0%
Regulatory Compliance	\$ 15,905	\$ -	0%
General Administration	\$ 45,724	\$ 36,507	80%
CPUC Energy Division Staff	\$ 4,375	\$ -	0%
Total Expenses	\$ 1,451,640	\$ 372,221	26%
Subsidies and Benefits	\$ 46,164,249	\$ 11,508,426	25%
Total Program Costs & Discounts	\$ 47,615,889	\$ 11,880,647	25%

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 Participants²⁰	Enrollment Rate
31,945	211,756	15%

During the September review of enrollments and disenrollments, SCE discovered a potential issue that could impact the reported figures. SCE is continuing its investigation to determine the cause of the issue. Once the root cause has been identified and corrected, 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.

²⁰ 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.

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**
- **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 continues to strive to achieve a 60% FERA penetration goal. Despite expansive efforts, SCE continues to face challenges in increasing FERA enrollments, achieving only a 15% penetration rate to date. To improve enrollment numbers, SCE will continue to explore other avenues by engaging with state agencies and implementing more targeted campaigns for hard-to-reach customers. The changes introduced by SB 1130 may help enroll customers who do not meet the current household limit criteria and allow SCE to promote FERA independently from CARE. However, based on historical performance, the current targets for FERA are significantly high and do not align with past results. Therefore, SCE plans to redefine the current FERA targets in the next application cycle. Ongoing campaigns utilize 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.

Direct Marketing

Direct Marketing

SCE targets customers who may be eligible for and benefit from the FERA program. In September, approximately 175,000 emails and approximately 24,927 direct mail pieces were sent to potential FERA-eligible applicants.

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 September 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 to address the impact of SB 1130 on the FERA program.

SCE is in the process of operationalizing the changes related to SB 1130, and once completed, the pilot program will begin to contact those customers that were previously denied in part to their ineligibility based on the old FERA program standards and allow them the opportunity to be enrolled. SCE will resume pilot outreach activities in first quarter 2025.

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 September 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) ^[4]	\$ 59,458,992		\$ 59,458,992	\$ 4,673,216		\$ 4,673,216	\$ 36,312,510		\$ 36,312,510	61%	0%	61%
ESA Multifamily Whole Building ^{[1][5]}	\$ 15,784,061		\$ 15,784,061	\$ 319,652		\$ 319,652	\$ 1,265,932		\$ 1,265,932	8%	0%	8%
ESA Pilot Plus and Pilot Deep	\$ 3,884,864		\$ 3,884,864	\$ 130,407		\$ 130,407	\$ 507,599		\$ 507,599	13%	0%	13%
Building Electrification Retrofit Pilot	\$ 10,252,080		\$ 10,252,080	\$ 133,608		\$ 133,608	\$ 1,434,414		\$ 1,434,414	14%	0%	14%
Clean Energy Homes New Construction Pilot ^[2]	\$ 1,775,000		\$ 1,775,000	\$ 28,219		\$ 28,219	\$ 439,975		\$ 439,975	25%	0%	25%
Single Point of Contact (SPOC) - MFWB	\$ 171,929		\$ 171,929	\$ 11,005		\$ 11,005	\$ 98,657		\$ 98,657	57%	0%	57%
SASH/MASH Unspent Funds ^[3]	\$ 6,159,288		\$ 6,159,288	\$ -		\$ -	\$ -		\$ -	0%	0%	0%
ESA Program TOTAL	\$ 96,282,711		\$ 96,282,711	\$ 5,296,106		\$ 5,296,106	\$ 40,059,088		\$ 40,059,088	42%	0%	42%

^[1] YTD Expense does not include \$9,890,174 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 measures in 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. See table 10 for advance payments and repayment details.

^[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 September 2024**

Appliances ESA 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
Energy Efficiency	\$ 50,221,660		\$ 50,221,660			\$ -			\$ -			
Appliances				\$ 901,707		\$ 901,707	\$ 9,258,499		\$ 9,258,499			
Domestic Hot Water				\$ 391,437		\$ 391,437	\$ 2,080,409		\$ 2,080,409			
Enclosure				\$ 82		\$ 82	\$ 13,211		\$ 13,211			
HVAC				\$ 1,456,951		\$ 1,456,951	\$ 8,235,108		\$ 8,235,108			
Maintenance				\$ 38,043		\$ 38,043	\$ 474,066		\$ 474,066			
Lighting				\$ 127,717		\$ 127,717	\$ 953,835		\$ 953,835			
Miscellaneous				\$ 386,463		\$ 386,463	\$ 2,847,895		\$ 2,847,895			
Customer Enrollment				\$ 642,212		\$ 642,212	\$ 5,281,654		\$ 5,281,654			
In Home Education				\$ 87,211		\$ 87,211	\$ 691,257		\$ 691,257			
Pilot				\$ -		\$ -	\$ -		\$ -			
Energy Efficiency TOTAL^[4]	\$ 50,221,660	\$ -	\$ 50,221,660	\$ 4,031,823	\$ -	\$ 4,031,823	\$ 29,835,935	\$ -	\$ 29,835,935	59%		59%
Training Center	\$ 450,488		\$ 450,488	\$ -		\$ -	\$ 198,893		\$ 198,893	44%		44%
Workforce Education and Training	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Inspections	\$ 864,125		\$ 864,125	\$ 72,266		\$ 72,266	\$ 725,402		\$ 725,402	84%		84%
Marketing and Outreach	\$ 2,346,963		\$ 2,346,963	\$ 105,593		\$ 105,593	\$ 1,427,075		\$ 1,427,075	61%		61%
Studies	\$ 290,000		\$ 290,000	\$ 12,659		\$ 12,659	\$ 113,476		\$ 113,476	39%		39%
Regulatory Compliance	\$ 720,611		\$ 720,611	\$ 40,156		\$ 40,156	\$ 624,719		\$ 624,719	87%		87%
General Administration ^[2]	\$ 4,513,566		\$ 4,513,566	\$ 410,718		\$ 410,718	\$ 3,385,779		\$ 3,385,779	75%		75%
CPUC Energy Division	\$ 51,579		\$ 51,579	\$ -		\$ -	\$ 1,232		\$ 1,232	2%		2%
Administration Subtotal	\$ 9,237,332		\$ 9,237,332	\$ 641,393		\$ 641,393	\$ 6,476,575		\$ 6,476,575	70%		70%
TOTAL PROGRAM COSTS	\$ 59,458,992		\$ 59,458,992	\$ 4,673,216		\$ 4,673,216	\$ 36,312,510		\$ 36,312,510	61%		61%
Funded Outside of ESA Program Budget												
Indirect Costs				\$ 113,960		\$ 113,960	\$ 1,156,116		\$ 1,156,116			
NGAT Costs												
ESA Program Administrative Expenses^[3]												
Administrative Expenses ^[3]				\$ 302,474		\$ 302,474	\$ 2,331,763		\$ 2,331,763			
Total Program Costs				\$ 4,673,216		\$ 4,673,216	\$ 36,312,510		\$ 36,312,510			
% of Administrative Spend						6%			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. See SCE Advice 5278-E submitted April 19, 2024. See table 10 for advance payments and repayment details.

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

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 September 2024**

Measures	Basic	Plus	Units	ESA Main Program (Summary) Total						
				Quantity Installed	kWh ^[1] (Annual)	kW ^[1] (Annual)	Therms ^[1] (Annual)	Expenses (\$)	% of Expenditure	
										Year-To-Date Completed & Expensed Installation
Appliances										
High Efficiency Clothes Washer	x		Home	16	1,501	0	-	\$ 20,389	0.1%	
Refrigerator	x		Home	6,366	3,665,471	440	-	\$ 8,582,489	28.8%	
New - Clothes Dryer	N/A	N/A	Each	-	-	-	-	\$ -	0.0%	
New - Dishwasher	x		Each	32	1,797	(0)	-	\$ 26,970	0.1%	
Freezers	x		Each	553	468,944	56	-	\$ 628,651	2.1%	
Domestic Hot Water										
Faucet Aerator	N/A	N/A	Home	-	-	-	-	\$ -	0.0%	
Other Domestic Hot Water ^[6]	x		Home	48	-	-	-	\$ 2,415	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	16	26,093	3	-	\$ 90,562	0.3%	
Heat Pump Water Heater - Gas	x		Each	412	(626,741)	(38)	-	\$ 1,969,719	6.6%	
Heat Pump Water Heater - Propane	x		Each	3	(4,719)	(0)	-	\$ 16,112	0.1%	
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	25	3,185	0	-	\$ 7,175	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	86	(14,620)	(2)	-	\$ 92,091	0.3%	
Central A/C replacement		x	Home	501	163,652	25	-	\$ 3,610,917	12.1%	
Heat Pump Replacement		x	Home	27	32,427	15	-	\$ 953,884	3.2%	
New - Heat Pump Replacement - CAC Gas		x	Each	111	(55,345)	97	-	\$ 949,922	3.2%	
New - Heat Pump Replacement - CAC Propane		x	Each	-	-	-	-	\$ -	0.0%	
Evaporative Cooler (Replacement)		x	Home	-	-	-	-	\$ -	0.0%	
Evaporative Cooler (Installation)		x	Home	1,431	777,827	117	-	\$ 1,786,700	6.0%	
Duct Test and Seal ^[9]	N/A	N/A	Home	674	-	-	-	\$ 255,894	0.9%	
Energy Efficient Fan Control		x	Home	56	8,229	4	-	\$ 36,810	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%	

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

Pilots									
Customer Enrollment									
ESA Outreach & Assessment			Home	33,874				\$ 5,281,654	17.7%
ESA In-Home Energy Education			Home	22,817				\$ 691,257	2.3%
Total Savings/Expenditures							14,547,918	2,757	(2,082)
Total Households Weatherized ^[2]									33

Households Treated	Total
- Single Family Households Treated	Home 25,205
- Mobile Homes Treated	Home 4,671
Total Number of Households Treated	Home 29,876
# Eligible Households to be Treated for PY^[3]	Home 64,922
% of Households Treated	% 46%
- Master-Meter Households Treated	Home 249

ESA Program - Main Administration^[5]	Year to Date Expenses^[4]	
	Electric	Gas Total
Direct Implementation (Non-Incentive)	\$ -	\$ -
Direct Implementation	\$ -	\$ -
	\$ 29,835,935	\$ 29,835,935
TOTAL ESA Main COSTS	\$ 29,835,935	\$ - \$ 29,835,935

<<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 September 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-kBTUh 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	18	-	9,774	1.17	-	\$ 24,530	3%
Domestic Hot Water									
New: Non-Condensing Domestic Hot Water Boiler	Cap-kBtuh	CAM/WB	-	-	-	-	-	\$ -	0%
New: Condensing Domestic Hot Water Boiler	Cap-kBtuh	CAM/WB	-	-	-	-	-	\$ -	0%
Storage Water Heater	Cap-kBtuh	CAM/WB	-	-	-	-	-	\$ -	0%
Tankless Water Heater	Cap-kBtuh	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	779	-	248	0.05	3,929.27	\$ 14,887	2%
Faucet Aerator	Each	In-Unit	96	-	343	0.07	363.26	\$ 748	0%
Thermostatic Tub Spout/Diverter	Each	In-Unit	120	-	-	-	591.09	\$ 7,128	1%
Thermostatic Shower Valve	Each	In-Unit	19	-	-	-	50.54	\$ 485	0%
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	4	-	-	-	20.99	\$ 111	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	661	-	-	-	-	\$ 17,251	2%
Attic Insulation	Household	In-Unit	-	-	-	-	-	\$ -	0%
Repair Ceiling/Floor/Wall (Interior/Exterior)	Sq Ft	In-Unit	44	-	-	-	-	\$ 1,460	0%
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-kBtuh	CAM/WB	-	-	-	-	-	\$ -	0%
Space Heating Boiler	Cap-kBtuh	CAM/WB	-	-	-	-	-	\$ -	0%
Smart Thermostats	Each	In-Unit	109	-	216	-	6.65	\$ 15,457	2%
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	18	-	3	0.00	0.07	\$ 3	0%
Lighting									
Interior LED Lighting	Each	In-Unit	196	-	3,212	0.36	(61.26)	\$ 1,730	0%
Interior TLED Type A Lamps	Each	In-Unit	1,571	-	9,242	1.03	(175.49)	\$ 16,138	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	1,197	-	231,413	3.18	(0.36)	\$ 87,216	11%
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	323	-	-	-	-	\$ 15,945	2%
CO and Smoke Alarm	Each	CAM/WB	-	-	-	-	-	\$ -	0%
Minor Repair	Each	In-Unit	2,204	-	-	-	-	\$ 53,555	7%

**Energy Savings Assistance Program Table 2A - Multifamily Whole Building (MFWB)
Southern California Edison
Through September 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	1,008					\$ 129,689	16%
ESA In-Home Energy Education	Household	In-Unit	1,008					\$ 21,495	3%
Whole Building Enrollment & Assessment									
Audit								\$ 384,447	48%
Other									
Taxes								\$ 3,055	0%
Total			7,359	-	254,452	5.86	4,725	\$ 795,329	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
unit)	1,008

ESA Program - MFWB	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ 222,458		\$ 222,458
Direct Implementation (Non-Incentive)	\$ 248,146		\$ 248,146
Direct Implementation	\$ 795,329		\$ 795,329
SPOC	\$ 98,657		\$ 98,657
TOTAL MFWB COSTS	\$ 1,364,589	\$ -	\$ 1,364,589

<<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 September 2024

Measures	Units	ESA Program - Pilot Plus				ESA Program - Pilot Deep					
		Quantity Installed	kWh (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure	Quantity Installed	kWh (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Measures											
Appliances											
Energy Star Chest Freezer: 14-18 cf	Each										
Energy Star Chest Freezer: 20-22 cf	Each										
Energy Star Chest Freezer: 5.9 cf	Each										
Energy Star Qualified Clothes Washer	Each	3	58	0.02	45.76 \$	3,270	3%				
HP Washer/Dryer Combo Unit	Each										
Energy Star Qualified Dishwashers	Each	2	96	0.00	-1.40 \$	2,730	3%				
Energy Star Qualified Refrigerators - Large 20+ cf	Each										
Energy Star Qualified Refrigerators - Medium 17 - 19 cf	Each										
Energy Star Qualified Refrigerators - Small 14-16 cf	Each										
Energy Star Upright Freezer: 13.5-15 cf	Each										
Energy Star Upright Freezer: 16-18 cf	Each										
Energy Star Upright Freezer: 20-22 cf	Each										
Cooling Measures											
Energy Star Qualified Ceiling Fans	Each										
Whole House Fan	Each	1	235	0.12	-0.61 \$	2,800	3%				
Evaporative cooler installation 3,000 CFM	Each										
Evaporative cooler installation 4,000 CFM	Each										
Evaporative cooler installation 5,000 CFM	Each										
Replace Room AC with Energy Star Qualified RAC - 10k BTU	Each										
Replace Room AC with Energy Star Qualified RAC - 12k BTU	Each										
Replace Room AC with Energy Star Qualified RAC - 15k BTU	Each										
Replace Room AC with Energy Star Qualified RAC - 6.8k BTU	Each										
Domestic Hot Water											
Faucet Aerator	Each	5	517	0.09	29.76 \$	164	0%				
Low-Flow Showerhead - Handheld	Each										
Low-Flow Showerhead - Regular	Each	1	12	0.00	9.96 \$	24	0%				
Energy Star HE Gas Storage Water Heater - 40G	Each										
Energy Star HE Gas Storage Water Heater - 50G	Each										
Replace existing electric WH with HP Water Heater - 40G	Each										
Replace existing electric WH with HP Water Heater - 50G	Each										
Replace existing electric WH with HP Water Heater - 80G	Each										
Replace with Solar Water Heating w/storage back up	Each	1	0	0.00	87.31 \$	4,910	3%				
Replace with Tankless Water Heater	Each	5	850	0.16	22.60 \$	255	0%				
Thermostatic Shower Valve	Each										
Water Heater - Repair water leak - NTE \$300	T&M										
Water Heater Blanket	Each	5	0	0.00	31.45 \$	125	0%				
Water Heater Pipe Insulation	Each										
Envelope											
Attic Cover Replacement	Each										
Attic Insulation, Add R-11	Per Square Foot	528	32	0.07	9.40 \$	977	1%				
Attic Insulation, Add R-19	Per Square Foot	1,760	141	0.30	39.78 \$	3,344	3%				
Attic Insulation, Add R-30	Per Square Foot	2,244	338	0.26	56.83 \$	4,376	4%				
Attic Insulation, Add R-38	Per Square Foot										
Attic Insulation, Add R-49	Per Square Foot										
Caulk	Per Linear Foot	10	0	0.00	0.00 \$	13	0%				
Cover Plate Gaskets	Per Home	10	0	0.00	0.00 \$	175	0%				
Duct Sealing - 120 Minutes	Per System	1	0	0.00	0.00 \$	365	0%				
Duct Sealing - 60 Minutes	Per System	1	0	0.00	0.00 \$	260	0%				
Duct Sealing - 90 Minutes	Per System										
Floor Insulation, Add R-19	Per Square Foot										
Glass Replacement	Per Square Foot										
High Efficiency Windows	Per Square Foot										
High-Performance Cool Roofs	Per Square Foot										
Insulated Exterior Doors	Per Door	1	-18	0.00	4.10 \$	610	0%				
Kitchen Exhaust Dampers	Each										
Minor Home / Envelope Repairs - NTE \$600	T&M	3	0	0.00	0.00 \$	1,335	0%				
Prescriptive Duct Sealing (No HVAC Replacement)	Per System										
Radiant Barriers	Per Square Foot										
Room AC/Evaporative Cooler Cover	Each										
Wall Insulation, Add R-13	Per Square Foot										
Weather-stripping	Per Linear Foot	185	0	0.00	0.00 \$	999	0%				
Window Film (Tint)	Per Square Foot										

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

Households Treated	Home	Total
- Single Family Households Treated	Home	9
- Mobile Homes Treated	Home	-
Total Number of Households Treated	Home	9

Households Treated	Home	Total
- Single Family Households Treated	Home	12
- Mobile Homes Treated	Home	-
Total Number of Households Treated	Home	12

	Year to Date Expenses		
	Electric	Gas	Total
ESA Program - Pilot Plus and Pilot Deep Administration ⁰¹	\$ 166,826	\$ 113,546	\$ 280,372
Direct Implementation (Non-Incentive) ⁰¹	\$ 203,956	\$ 203,956	\$ 407,911
Direct Implementation ⁰¹	\$ 136,818	\$ 125,639	\$ 262,457
TOTAL Pilot Plus and Pilot Deep COSTS	\$ 507,599	\$ 443,141	\$ 950,740

<< Includes measure costs

	Year to Date Expenses		
	Electric	Gas	Total
ESA Program - Pilot Plus and Pilot Deep Inspections	\$ 742	\$ 742	\$ 1,484
Marketing and Outreach	\$ 46,676	\$ 46,676	\$ 93,352
General Administration	\$ 62,917	\$ 9,637	\$ 72,554
Direct Implementer - ADMIN	\$ 203,956	\$ 203,956	\$ 407,911
EM&V Studies	\$ 50,997	\$ 50,997	\$ 101,994
Direct Installation - Materials	\$ 58,233	\$ 50,974	\$ 109,207
Performance Incentive	\$ 50,565	\$ 44,467	\$ 95,032
Home Audit; Test-In; Test-Out	\$ 22,818	\$ 24,002	\$ 46,820
Remediation & Mitigation	\$ 5,202	\$ 6,197	\$ 11,398
WE&T	\$ 5,494	\$ 5,494	\$ 10,988
Total	\$ 507,599	\$ 443,141	\$ 950,740

⁰¹ Administration includes expenses from the following categories: General Administration, Regulatory Compliance, Training, Inspections, Marketing and Outreach, and Evaluation.

⁰² Direct Implementation (Non-Incentive) includes expenses for Implementer Administration and Marketing.

⁰³ Direct Implementation includes expenses for measures delivery.

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 September 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	34	(10,367)	-	515	\$ 44,115	3.3%
Heat Pump Dryer	Each	1	(245)	-	13	\$ 2,120	0.2%
Induction Cooktop	Each	4	(360)	-	23	\$ 7,145	0.5%
Induction Range	Each	22	(4,554)	-	315	\$ 46,024	3.4%
Domestic Hot Water							
Heat Pump Water Heater	Each	65	(79,880)	-	10,721	\$ 339,870	25.0%
Enclosure							
Attic Insulation	Home	1	38	-	-	\$ 1,978	0.1%
HVAC							
Heat Pump HVAC	Each	71	(82,923)	-	14,429	\$ 853,751	62.9%
Duct Seal	Each	43	-	-	-	\$ 16,340	1.2%
Smart Thermostat	Each	15	751	-	-	\$ 4,200	0.3%
Miscellaneous^[3]							
Minor Home Repair	Home	-				\$ -	0.0%
Carbon Monoxide/Smoke Alarm	Each	224				\$ 18,453	1.4%
Electric Panel	Each	-				\$ -	0.0%
Electric Sub-Panel	Each	-				\$ -	0.0%
Electrical Circuit Run	Each	-				\$ -	0.0%
Induction Cookware	Home	22				\$ 3,300	0.2%
Customer Enrollment							
Energy Assessment	Home	66				\$ 19,800	1.5%
Total Savings/Expenditures							
			(177,540)	-	26,016	\$ 1,357,096	100%
Claimable kWh Savings^[4]							
			584,729				

Households Treated		Total
Single Family Households Treated	Home	66
Estimated Avg. Annual Bill Savings Treated ^[5]	Home	\$ 887

ESA Program - Building Electrification	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ 193,483		\$ 193,483
Direct Implementation (Non-Incentive) ^[6]	\$ 132,045		\$ 132,045
Direct Implementation ^[7]	\$ 1,108,886		\$ 1,108,886
TOTAL Building Electrification COSTS	\$ 1,434,414	\$ -	\$ 1,434,414

<<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 September 2024**

ESA CEH Program Offerings	Units	ESA Program - Clean Energy Homes New Construction Pilot ^[1]					
		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]	Estimated Incentive Expenses (\$)	% Incentive Budget
Interest Form submitted	Homes	0	0	19	917		
Interest Form denied	Homes	2	266	5	369		
Application for direct design assistance (in progress)	Homes					\$ -	
Applications for design incentive (in progress) ^[3]	Homes	0	0	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	0	0	0	0	\$ -	
Applications for tenant education incentive (completed)	Homes					\$ -	
Total Savings/Expenditures						\$ 150,000	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. Zero new applications were received for September 2024. The 3 projects listed for cumulative design incentive were already existing and still under review. Two forms were denied in September 2024.

^[3]The (\$) amount for the three projects is \$50K for each project incentive. Totaling to \$150k total.

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	0	31*

*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%

*There are three DA applications under review but have not been completed, meaning submitted, reviewed and incentive paid.

ESA Program - Clean Energy Homes	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ 90,184	\$ -	\$ 90,184
Direct Implementation (Non-Incentive)	\$ 349,790	\$ -	\$ 349,790
Direct Implementation	\$ -	\$ -	\$ -
TOTAL Clean Energy Homes COSTS	\$ 439,975	\$ -	\$ 439,975

<<Includes measures costs

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

Measures	Basic	Plus	ESA Program - CSD Leveraging						
			Units	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 September 2024**

Table 3A, ESA Main Program (SF, MH)	
Annual kWh Savings	14,547,918
Annual Therm Savings	-
Lifecycle kWh Savings	85,957,338
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	\$ 596

Table 3B, ESA Program - Multifamily Whole Building (MF In-Unit)	
Annual kWh Savings	254,452
Annual Therm Savings	4,725
Lifecycle kWh Savings	692,383
Lifecycle Therm Savings	45,317
Current kWh Rate ^[1]	\$ 0.21
Current Therm Rate	\$ 1.38
Average 1st Year Bill Savings / Treated Property	\$ 59
Average Lifecycle Bill Savings / Treated Property	\$ 204

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 Sep 2024.

Table 3D, ESA Program - Pilot Plus	
Annual kWh Savings	8,778
Annual Therm Savings	393
Lifecycle kWh Savings	87,783
Lifecycle Therm Savings	3,934
Current kWh Rate ^[1]	\$ 0.21
Current Therm Rate	\$ 1.38
Average 1st Year Bill Savings / Treated Property	\$ 262
Average Lifecycle Bill Savings / Treated Property	\$ 2,622

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

Table 3E, ESA Program - Pilot Deep	
Annual kWh Savings	23,814
Annual Therm Savings	1,632
Lifecycle kWh Savings	238,144
Lifecycle Therm Savings	16,315
Current kWh Rate ^[1]	\$ 0.21
Current Therm Rate	\$ 1.38
Average 1st Year Bill Savings / Treated Property	\$ 598
Average Lifecycle Bill Savings / Treated Property	\$ 5,984

Table 3F, ESA Program - Building Electrification (SCE Only) ^[2]	
Annual kWh Savings	584,729
Annual Therm Savings	-
Lifecycle kWh Savings	7,585,038
Lifecycle Therm Savings	335,377
Current kWh Rate ^[1]	\$ 0.21
Current Therm Rate	\$ -
Average 1st Year Bill Savings / Treated Households	\$ 1,834
Average Lifecycle Bill Savings / Treated Households	\$ 23,788

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	
Annual kWh Savings	14,834,963
Annual Therm Savings	6,750
Lifecycle kWh Savings	86,975,648
Lifecycle Therm Savings	65,566
Current kWh Rate ^[1]	\$ 0.21
Current Therm Rate	\$ 1.38
Average 1st Year Bill Savings / Treated Households	\$ 961
Average Lifecycle Bill Savings / Treated Households	\$ 9,202

^[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 September 2024**

Table 4A, ESA Program (SF, MH)						
	Eligible Households			Households Treated YTD		
County	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	376	1	377
Kings	11,276	0	11,276	377	0	377
Los Angeles	3,542	678,712	682,254	210	15,151	15,361
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	1,783	1,783
Riverside	121,767	118,244	240,011	517	2,857	3,374
San Bernardino	50,024	236,393	286,417	932	4,421	5,353
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	1,400	533	1,933
Ventura	2,962	84,312	87,274	23	1,295	1,318
Total	266,570	1,451,274	1,717,843	3,835	26,041	29,876

Table 4B, ESA Program - MFWB (MF In-Unit)						
	Eligible Households^[2]			Households Treated YTD		
County				Rural	Urban	Total
Kings				3	0	3
Los Angeles				0	230	230
Orange				0	390	390
Riverside				143	1	144
San Bernardino				0	208	208
Tulare				27	6	33
Total	0	0	0	173	835	1,008

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

Table 4C, ESA Program - Multifamily Whole Building (MFCAM)						
	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 September 2024.

Table 4D, ESA Program - Pilot Plus and Pilot Deep						
	Eligible Households			Households Treated YTD		
County	Rural ^[1]	Urban	Total	Rural	Urban	Total
Los Angeles	131	8,847	8,978	0	6	6
Riverside	1,576	3,564	5,140	12	2	14
San Bernardino	42	3,566	3,608	0	1	1
Total	1,749	15,977	17,726	12	9	21

Table 4E, ESA Program - CSD Leveraging						
	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 - 5E - Energy Savings Assistance Program Customer Summary
Southern California Edison
Through September 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	-	1,950,434	348	3,816	-	1,950,434	348
June									4,017	-	1,885,217	368	4,017	-	1,885,217	368
July									4,800	-	2,090,968	398	4,800	-	2,090,968	398
August									3,723	-	1,784,657	300	3,723	-	1,784,657	300
September									3,555	-	1,726,018	341	3,555	-	1,726,018	341
October									-	-	-	-	-	-	-	-
November									-	-	-	-	-	-	-	-
December									-	-	-	-	-	-	-	-
YTD	-	-	-	-	-	-	-	-	29,876	-	14,547,918	2,757	29,876	-	14,547,918	2,757

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	1,037.33	12,215	0.47	177	1,037.33	12,215	0.47
May									21	(3.55)	1,867	0.04	21	(3.55)	1,867	0.04
June									82	5.06	26,011	0.48	82	5.06	26,011	0.48
July									1	5.11	582	0.01	1	5.11	582	0.01
August									257	1,675	63,529	1.47	257	1,675	63,529	1.47
September									470	2,006.13	150,248	3.39	470	2,006.13	150,248	3.39
October									-	-	-	-	-	-	-	-
November									-	-	-	-	-	-	-	-
December									-	-	-	-	-	-	-	-
YTD	-	-	-	-	-	-	-	-	1,008	4,725	254,452	6	1,008	4,725	254,452	6

Table 5C, ESA Program - Multifamily Whole Building (MFCAM) ^{[1][2]}																
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	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

^[1] Multifamily Whole Building/Common Area Measures; does not include in-unit measures, which are detailed in table 5B.

^[2] No data to report as of September 2024.

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 ^[1]	11	1,474	26,899	8									11	1,474	26,899	8
September	3	382	1,594	0									3	382	1,594	0
October													-	-	-	-
November													-	-	-	-
December													-	-	-	-
YTD	21	2,025	32,593	10									21	2,025	32,593	10

^[1] August savings were recalculated and updated accordingly.

**Energy Savings Assistance Program Table 5A - 5E - Energy Savings Assistance Program Customer Summary
Southern California Edison
Through September 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									2	778	(5,873)	-	2	778	(5,873)	-
October													-	-	-	-
November													-	-	-	-
December													-	-	-	-
YTD	-	-	-	-	-	-	-	-	66	26,015	(177,539)	-	66	26,015	(177,539)	-

⁽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	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

**Energy Savings Assistance Program Table 6 - Expenditures for Pilots and Studies
Southern California Edison
Through September 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	\$ 130,407	\$ -	\$ 130,407	\$ 507,599	\$ -	\$ 507,599	\$ 1,282,281	\$ -	\$ 1,282,281	7%		7%
Building Electrification Retrofit Pilot	\$ 40,832,693	\$ -	\$ 40,832,693	\$ 133,608	\$ -	\$ 133,608	\$ 1,434,414	\$ -	\$ 1,434,414	\$ 2,195,612	\$ -	\$ 2,195,612	5%		5%
Clean Energy Homes New Construction Pilot	\$ 8,859,000	\$ -	\$ 8,859,000	\$ 28,219	\$ -	\$ 28,219	\$ 439,975	\$ -	\$ 439,975	\$ 1,188,111	\$ -	\$ 1,188,111	13%		13%
Total Pilots	\$69,116,010	\$ -	\$69,116,010	\$292,233	\$ -	\$292,233	\$2,381,988	\$ -	\$2,381,988	\$4,666,004	\$0	\$4,666,004	7%		7%
Pilot Evaluations (SCE)⁽⁶⁾															
ESA Pilot Plus/Deep Program Pilot Evaluation	\$ 1,744,513	\$ -	\$ 1,744,513	\$ 6,229	\$ -	\$ 6,229	\$ 53,893	\$ -	\$ 53,893	\$ 190,668	\$ -	\$ 190,668	11%		11%
Building Electrification Retrofit Pilot Evaluation	\$ 594,930	\$ -	\$ 594,930	\$ -	\$ -	\$ -	\$ 47,155	\$ -	\$ 47,155	\$ 191,352	\$ -	\$ 191,352	32%		32%
Clean Energy Homes New Construction Pilot Evaluation	\$ 164,550	\$ -	\$ 164,550	\$ -	\$ -	\$ -	\$ 6,863	\$ -	\$ 6,863	\$ 28,495	\$ -	\$ 28,495	17%		17%
Total Pilot Evaluations	\$ 2,503,993	\$ -	\$ 2,503,993	\$ 6,229	\$ -	\$ 6,229	\$ 107,911	\$ -	\$ 107,911	\$ 410,515	\$ -	\$ 410,515	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	\$ 12,765	\$ -	\$ 12,765	\$ 61,220	\$ -	\$ 61,220	\$ 61,220	\$ -	\$ 61,220	41%		41%
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	\$12,765	\$ -	\$12,765	\$61,220	\$ -	\$61,220	\$158,615	\$0	\$158,615	14%		14%

⁽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 September 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	25,201	2.27%	6,477	389%	450	460	0.070	4.71	1.47	\$ 823
MH	122,664	4,671	3.81%	541	863%	484	477	0.080	(0.66)	(1.02)	\$ 594
MF In-Unit	452,445	4	0.00%	-	0%	621	621	0.090	(1.28)	(1.28)	\$ 783
Rent vs. Own											
Own	734,229	12,284	1.67%	4,769	258%	494	509	0.090	9.24	3.13	\$ 1,196
Rent	955,993	17,592	1.84%	2,249	782%	428	430	0.070	0.12	(0.35)	\$ 501
Previous vs. New Participant											
Previous	-	11,575	0.00%	2,108	549%	457	458	0.080	3.14	1.24	\$ 777
New Participant	27,051	17,096	63.20%	4,595	372%	463	475	0.080	4.76	1.18	\$ 817
Seniors	506,658	5,474	1.09%	2,003	273%	461	459	0.080	4.27	2.57	\$ 978
Veterans	95,822	520	0.54%	211	246%	468	485	0.080	11.69	6.12	\$ 1,103
Hard-to-Reach ^[4]	1,352,338	25,184	1.86%	6,829	369%	463	472	0.080	4.22	1.22	\$ 828
Vulnerable ^[5]	603,866	25,313	4.19%	5,437	466%	449	456	0.070	2.36	0.55	\$ 724
Location											
DAC	464,442	19,431	4.18%	3,284	592%	438	445	0.070	1.27	(0.20)	\$ 628
Rural	264,615	4,989	1.89%	2,079	240%	520	559	0.090	12.63	3.62	\$ 1,502
Tribal	8,832	124	1.40%	40	310%	482	506	0.080	8.47	3.35	\$ 983
PSPS Zone	118,256	79	0.07%	39	203%	445	445	0.070	(1.60)	(1.60)	\$ 683
Wildfire Zone	281,693	3,664	1.30%	1,505	243%	520	521	0.090	5.11	2.82	\$ 1,066
Climate Zone 06	255,532	1,463	0.57%	177	827%	386	386	0.050	(0.04)	(0.04)	\$ 429
Climate Zone 08	400,491	11,589	2.89%	1,670	694%	400	400	0.060	(0.04)	(0.04)	\$ 602
Climate Zone 09	328,310	4,379	1.33%	669	655%	511	511	0.080	(0.19)	(0.19)	\$ 823
Climate Zone 10	353,565	6,697	1.89%	2,069	324%	495	491	0.090	0.69	1.04	\$ 1,837
Climate Zone 13	89,360	2,560	2.86%	906	283%	505	574	0.070	13.20	0.29	\$ 1,547
Climate Zone 14	159,858	2,445	1.53%	1,253	195%	464	518	0.100	30.19	10.01	\$ 1,828
Climate Zone 15	64,877	443	0.68%	169	262%	580	471	0.130	13.51	5.33	\$ 796
Climate Zone 16	38,147	300	0.79%	105	286%	507	506	0.120	(4.25)	(2.56)	\$ 427
CARB Communities ^[6]	169,417	8,548	5.05%	1,109	771%	388	388	0.060	(0.10)	(0.09)	\$ 872
Financial											
CARE	1,302,665	17,186	1.32%	6,419	268%	463	474	0.080	5.07	1.69	\$ 888
FERA	211,756	190	0.09%	74	257%	465	470	0.080	4.12	2.23	\$ 792
Disconnected ^[7]	35,313	186	0.53%	28	664%	469	472	0.070	1.10	0.11	\$ 764
Arrearages	687,677	17,033	2.48%	3,807	447%	454	461	0.080	3.14	0.73	\$ 909
High Usage	69,406	483	0.70%	189	256%	455	456	0.080	4.01	1.66	\$ 1,477
High Energy Burden ^[8]	372,317	6,162	1.66%	2,626	235%	502	529	0.090	15.06	4.70	\$ 872
SEVI^[9]											
Low ^[9]	203,389	1,099	0.54%	499	220%	530	530	0.090	6.59	3.43	\$ 1,035
Medium ^[9]	595,200	8,202	1.38%	2,867	286%	484	491	0.090	7.37	2.96	\$ 664
High ^[9]	523,601	20,575	3.93%	3,652	563%	440	448	0.070	2.33	0.21	\$ 787
Affordability Ratio ^[10]	88,451	29,720	33.60%	6,994	425%	455	463	0.080	3.89	1.09	\$ 941
Health Condition											
Medical Baseline											
Respiratory ^[11]	26,355	1,006	3.82%	534	188%	494	509	0.080	9.48	4.24	\$ 1,187
Low^[11]											
Medium ^[11]	370,549	1,690	0.46%	636	266%	515	506	0.080	3.09	1.32	\$ 751
High ^[11]	506,698	12,234	2.41%	2,794	438%	466	474	0.080	2.74	0.74	\$ 790
Disabled	444,943	15,952	3.59%	3,588	445%	440	449	0.080	4.81	1.32	\$ 941

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.

Hard to Reach

^[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.

Vulnerable

^[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.

CARB Communities

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

Disconnected

^[7] Based on calendar year 2023.

High Energy Burden

^[8] Utilizing Low-Income Energy Affordability Data (LEAD) Tool to determine average energy burden as a % of income by census tract. High Energy Burden threshold of 6.3% and above is selected based on 2016 Low Income Needs Assessment (LINA).

SEVI

^[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.

Affordability Ratio

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

Respiratory

^[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 September 2024.

Energy Savings Assistance Program Table 7 - Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions
Southern California Edison
Through September 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		13				323	323	0.01	3.33	3.33	\$ 404
Rent		995				252	252	0.01	4.70	4.70	\$ 422
Previous vs. New Participant											
New		1,008				252	252	0.01	4.69	4.69	\$ 421
Previous		NA				NA	NA	-	NA	NA	NA
Seniors		797				236	236	0.01	4.47	4.47	\$ 372
Veterans		14				120	120	0.00	4.13	4.13	\$ 289
Hard-to-Reach ^[2]		1,005				252	252	0.01	4.69	4.69	\$ 421
Vulnerable ^[3]		817				274	274	0.01	4.40	4.40	\$ 402
Location											
DAC		748				296	296	0.01	4.15	4.15	\$ 422
Rural		173				241	241	0.00	4.62	4.62	\$ 398
Tribal		-				-	-	-	-	-	\$ -
PSPS Zone ^[9]		-				-	-	-	-	-	\$ -
Wildfire Zone		180				225	225	0.01	6.30	6.30	\$ 497
Climate Zone 06		29				204	204	0.00	5.98	5.98	\$ 272
Climate Zone 08		493				223	223	0.01	4.22	4.22	\$ 394
Climate Zone 09		67				23	23	0.00	7.12	7.12	\$ 179
Climate Zone 10		342				364	364	0.01	4.87	4.87	\$ 509
Climate Zone 13		36				11	11	0.00	4.53	4.53	\$ 484
Climate Zone 14		-				-	-	-	-	-	\$ -
Climate Zone 15		-				-	-	-	-	-	\$ -
Climate Zone 16		1				795	795	0.01	(0.45)	(0.45)	\$ 602
CARB Communities ^[4]		62				313	313	0.00	4.42	4.42	\$ 397
Financial											
CARE		713				270	270	0.01	4.24	4.24	\$ 425
FERA		-				-	-	-	-	-	\$ -
Disconnected ^[5]		-				-	-	-	-	-	\$ -
Acreages ^[6]		-				-	-	-	-	-	\$ -
High Usage ^[9]		-				-	-	-	-	-	\$ -
High Energy Burden ^[5]		224				323	323	0.01	5.06	5.06	\$ 495
SEVI ^[7]											
Low		30				34	34	0.00	3.83	3.83	\$ 477
Medium		144				169	169	0.01	6.53	6.53	\$ 498
High		834				275	275	0.01	4.40	4.40	\$ 406
Affordability Ratio ^[8]		978				259	259	0.01	4.71	4.71	\$ 420
Health Condition											
Medical Baseline		22				267	267	0.01	3.34	3.34	\$ 448
Respiratory ^[3]											
Low		283				128	128	0.01	6.28	6.28	\$ 399
Medium		349				332	332	0.01	4.57	4.57	\$ 399
High		376				272	272	0.01	3.60	3.60	\$ 460
Disabled		307				256	256	0.00	3.71	3.71	\$ 389

Customer Segments:

Households Treated
Hard to Reach

Vulnerable
CARB Communities
High Energy Burden

SEVI
Affordability Ratio
Respiratory

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.

Pilot Plus and Pilot Deep

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	21	0.12%	8,331	0.25%	1,644	-	5.99	95	-	\$ 13,653
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	20	0.52%	1,843	1.09%	1,648	-	6.25	99	-	\$ 14,163
Rent	677	1	0.15%	315	0.32%	1,561	-	0.93	16	-	\$ 10,191
Previous vs. New Participant											
Previous	2,458	14	0.57%	286	0.25%	1,439	-	0.40	107	-	\$ 14,006
New Participant	14,872	7	0.05%	6,781	0.10%	2,055	-	0.63	71	-	\$ 13,909
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	17,726	21	0.12%	8,331	0.25%	1,644	-	5.99	95	-	\$ 13,653
Vulnerable	10,683	3	0.03%	2,632	0.11%	991	-	0.36	281	-	\$ 17,824
Location											
DAC	611	3	0.49%	99	3.03%	926	-	0.05	255	-	\$ 19,741
Rural	1,749	12	0.69%	1,619	0.74%	1,911	-	10.10	52	-	\$ 12,054
Tribal	1,345	0	0.00%	15	0.00%	-	-	-	-	-	\$ -
PSPS Zone	10,807	1	0.01%	5,285	0.02%	1,886	-	13.34	64	-	\$ 12,219
Climate Zone 06	341	0	0.00%	88	0.00%	-	-	-	-	-	\$ -
Climate Zone 08	2,396	2	0.08%	832	0.24%	961	-	0.19	271	-	\$ 20,302
Climate Zone 09	4,639	3	0.06%	2,454	0.12%	1,143	-	0.43	120	-	\$ 13,071
Climate Zone 10	8,410	15	0.18%	4,545	0.33%	1,705	-	8.21	64	-	\$ 12,974
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	1	0.06%	276	0.36%	3,606	-	1.08	130	-	\$ 19,017
Climate Zone 15	184	0	0.00%	74	0.00%	-	-	-	-	-	\$ -
Climate Zone 16	119	0	0.00%	89	0.00%	-	-	-	-	-	\$ -
CARB Communities	1,431	1	0.07%	685	0.15%	1,663	-	-	297	-	\$ 17,986

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

Financial													
CARE	17,726	21	0.12%	8,331	0.25%	1,644	-	5.99	95	-	\$	13,653	
FERA	0	0	0.00%	-	0.00%	-	-	-	-	-	\$	-	
Disconnected	88	0	0.00%	37	0.00%	-	-	-	-	-	\$	-	
Arrearages	10,474	8	0.08%	4,955	0.16%	1,084	-	14.93	96	-	\$	13,729	
High Usage	17,726	21	0.12%	8,331	0.25%	1,644	-	5.99	95	-	\$	13,653	
High Energy Burden	17,210	0	0.00%	4,674	0.00%	-	-	-	-	-	\$	-	
SEVI													
Low	1,819	1	0.05%	800	0.13%	2,155	-	0.05	93	-	\$	9,572	
Medium	4,981	9	0.18%	2,145	0.42%	1,254	-	0.52	97	-	\$	15,088	
High	10,926	11	0.10%	5,384	0.20%	1,917	-	0.47	94	-	\$	13,462	
Affordability Ratio	17,572	20	0.11%	3,166	0.63%	1,546	-	6.24	94	-	\$	13,721	
Health Condition													
Medical Baseline	347	0	0.00%	161	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	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	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	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	N/A

^[1] Based on Year 1 Cohort.

Building Electrification (SCE 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		66			0%	8,860	8,860	-	394	394	\$ 20,562
MH					0%						
MF In-Unit					0%						
Rent vs. Own											
Own		61			0%	8,991	8,991	-	399	399	\$ 20,620
Rent		5			0%	7,256	7,256	-	332	332	\$ 19,851
Previous vs. New Participant											
Previous					0%						
New Participant		66			0%	8,860	8,860	-	394	394	\$ 20,562
Seniors					0%						
Veterans					0%						
Hard-to-Reach					0%						
Vulnerable					0%						
Location											
DAC		66			0%	8,860	8,860	-	394	394	\$ 20,562
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		30			0%	10,508	10,508	-	470	470	\$ 21,177
Climate Zone 13		6			0%	8,736	8,736	-	390	390	\$ 19,910
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		54			0%	9,040	9,040	-	401	401	\$ 20,754
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 September 2024**

Partner	Brief Description of Effort	# 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.	35 ^[11]	N/A	N/A	512	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	89	N/A	16	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	128	436	436
CARE/FERA Income Verification ^[9]	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	Customers whose usage was identified as exceeding 400% to 600% (or more) above the baseline.	N/A	N/A	N/A	913	82
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	2	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 (SE-P) ^[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 \$60 annually for participating between June 1 through September 30.	220	N/A	8	N/A	N/A
Tribal Activity	SCE collaborated with Tribal leaders, offering 513K 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	28	0	N/A
Other Utilities ^[8]	Southwest Gas	372	0	N/A	1,117	15
Other Utilities ^[8]	SoCalGas	N/A	N/A	N/A	6,300	3,487
Other Utilities ^[8]	PG&E	N/A	N/A	N/A	N/A	N/A
MFWB ^[8]	Coordination with RHA (SDG&E's Implementer) for the Southern MFWB program	1,659	N/A	1	N/A	N/A
ESA Whole Home to ESA Main ^[12]	Number of Homes Enrolled in ESA Core as a result of being referred by ESA Whole Home due to home not being able to meet minimum 5% for ESA Whole Home participation.	N/A	N/A	N/A	52	TBD

^[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, trade shows, 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 Q4 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 Single-family 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] Number of leads corrected by third party. Third party is in the process of analyzing its data sources and reporting process to produce # of enrollments.

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 - 9 Tribal Outreach
Southern California Edison
Through September 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.

**Energy Savings Assistance Program Table 10 - Contractor Advanced Funding and Repayment
Southern California Edison
Through September 2024**

Month	Year	A	B	C	D	C + D = E	B - E = F
		Total Advanced Amount	Expected Monthly Collection ^[1]	Total Contractor Invoices Applied for the Month ^[2]	Total Electronic Payments Applied for the Month ^[3]	Total Payments Received for the Month	Total Advances Outstanding for the Month ^[4]
May	2024	\$ 8,000,000					
June	2024	\$ 1,000,000					
July	2024						
August	2024						
September	2024		\$ 321,429	\$ -	\$ 322,143	\$ 322,143	\$ (714)
October	2024						
November	2024						
December	2024						
January	2025						
February	2025						
March	2025						
April	2025						
May	2025						
June	2025						
July	2025						
August	2025						
September	2025						
October	2025						
November	2025						
December	2025						
January	2026						
February	2026						
March	2026						
April	2026						
May	2026						
June	2026						
July	2026						
August	2026						
September	2026						
October	2026						
November	2026						
December	2026						
Total		\$ 9,000,000	\$ 321,429	\$ -	\$ 322,143	\$ 322,143	\$ (8,677,857)

^[1] The amount of repayments expected to be collected each month, calculated by dividing the total Advance Payment into 28 monthly installments. The first repayment is due on September 3, 2024, with subsequent repayments due on the first business day of each month. The Prime Contractor must repay the full Advance Payment by December 1, 2026.

^[2] Prime Contractor may fulfill its Repayment Obligation by invoice reduction, allowing SCE to withhold payments due for an outstanding invoice. SCE will credit the Repayment Obligation amount to reduce the unpaid balance of the Advance Payment and pay the remaining invoice amount to Prime Contractor.

^[3] Prime Contractor may fulfill its Repayment Obligation through electronic payments, such as via Automated Clearing House (ACH) or wire.

^[4] SCE monitors payments, outstanding balances, and remaining balance of the Advanced Payment on a monthly basis. A negative amount shown in parenthesis indicates that a contractor(s) has paid more than the required minimum monthly payment.

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 September 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	\$ 173,824		\$ 173,824	\$ 1,746,322		\$ 1,746,322	47%		47%
Processing / Certification Re-certification	\$ 1,615,434		\$ 1,615,434	\$ 180,137		\$ 180,137	\$ 1,414,512		\$ 1,414,512	88%		88%
Post Enrollment Verification	\$ 510,137		\$ 510,137	\$ 16,230		\$ 16,230	\$ 144,108		\$ 144,108	28%		28%
IT Programming	\$ 570,000		\$ 570,000	\$ 28,882		\$ 28,882	\$ 130,651		\$ 130,651	23%		23%
CHANGES Program	\$ 525,000		\$ 525,000	\$ -		\$ -	\$ 195,533		\$ 195,533	37%		37%
Studies and Pilots	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	0%		0%
Measurement and Evaluation	\$ 36,000		\$ 36,000	\$ -		\$ -	\$ (764)		\$ (764)	-2%		-2%
Regulatory Compliance	\$ 493,041		\$ 493,041	\$ 11,301		\$ 11,301	\$ 248,653		\$ 248,653	50%		50%
General Administration	\$ 1,417,444		\$ 1,417,444	\$ 170,840		\$ 170,840	\$ 1,505,631		\$ 1,505,631	106%		106%
CPUC Energy Division	\$ 135,625		\$ 135,625	\$ -		\$ -	\$ 7,953		\$ 7,953	6%		6%
SUBTOTAL MANAGEMENT COSTS	\$ 9,002,553	\$ -	\$ 9,002,553	\$ 581,214	\$ -	\$ 581,214	\$ 5,392,599	\$ -	\$ 5,392,599	60%	0%	60%
CARE Rate Discount	\$ 415,120,450		\$ 415,120,450	\$ 97,797,910		\$ 97,797,910	\$ 657,365,264		\$ 657,365,264	158%		158%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 424,123,003		\$ 424,123,003	\$ 98,379,123		\$ 98,379,123	\$ 662,757,864		\$ 662,757,864	156%	0%	156%
Other CARE Rate Benefits												
- DWR Bond Charge Exemption				\$ 2,163,326		\$ 2,163,326	\$ 14,444,949		\$ 14,444,949			
- CARE Surcharge Exemption				\$ 4,708,416		\$ 4,708,416	\$ 31,545,374		\$ 31,545,374			
- kWh Surcharge Exemption												
- Vehicle Grid Integration Exemption												
Total Other CARE Rate Benefits				\$ 6,871,742	\$ -	\$ 6,871,742	\$ 45,990,323	\$ -	\$ 45,990,323			
Indirect Costs				\$ 114,293		\$ 114,293	\$ 975,803		\$ 975,803			

⁽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 September 2024

Month	Automatic Enrollment				New Enrollment				Recertification				Attrition (Drop Offs)				Enrollment			Total Residential Accounts	Enrollment Rate % (W/X)	Estimated CARE Eligible ⁽⁶⁾	Total CARE Participants	Gas Only	Electric Only										
	Intro. Utility ⁽¹⁾	Intro. Utility ⁽²⁾	Levraging ⁽³⁾	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (E+G+H)	Total New Enrollment ⁽¹⁾ (K+J)	Scheduled	Non-Scheduled	Automatic	Total Recertification (L+M+N)	No Response ⁽⁴⁾	Failed PEV	Failed Recertification	Other ^(5,7)	Total Accounts (P+Q+R+S)							Gross (K*O)	Net Adjusted (K-F)								
January	71	89	554	714	14,213	3,177	7,021	141	25,552	25,266	788	207	44	1,039	2,020	1	53	5,468	7,542	26,305	17,724	1,307,217	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	11,583	13,519	23,945	7,335	1,314,552	4,599,916			4,599,916									
March	73	20	40	133	12,865	2,420	6,673	127	22,085	22,116	1,447	351	1,392	4,680	2,865	5	46	18,493	20,721	29,246	5,889	1,320,413	4,603,401			4,603,401									
April	83	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	4,614,130			4,614,130									
May	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	4,614,577			4,614,577									
June	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	4,616,791			4,616,791									
July	1,363	104	391	1,858	22,098	10,450	8,955	312	41,815	45,673	10,670	8,319	5,734	24,723	9,596	0	147	21,078	30,821	68,396	12,652	1,356,862	4,626,834			4,626,834									
August	18	81	371	470	13,945	2,808	6,200	182	23,135	23,605	9,732	3,129	10,178	23,059	16,099	0	161	4,177	20,437	46,644	3,168	1,360,030	4,626,834			4,626,834									
September																																			
October																																			
November																																			
December																																			
YTD Total	2,439	702	3,143	6,284	126,353	43,676	58,163	1,834	230,426	246,710	32,253	19,905	21,334	72,592	48,869	26	762	117,316	166,173	309,310	70,537	1,360,030	4,624,647			4,624,647									

⁽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 to PEV data sharing.
⁽⁵⁾ No response to failed recertification and verification.
⁽⁶⁾ Includes customers who requested to be removed, deceased, and customers who moved out.
⁽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 September 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%	931	25	956	24.0%	0.1%
February	1,314,552	1,530	0.1%	3	3	6	0.4%	0.0%
March	1,320,413	3,107	0.2%	723	10	733	23.6%	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	1,360,030	24	0.0%	0	0	0	0.0%	0.0%
October								
November								
December								
YTD Total	1,360,030	10,231	0.8%	1,660	38	1,698	16.6%	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.

^[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 3B Post-Enrollment Verification Results (Electric only High Usage)
Southern California Edison
Through September 2024**

Month	Total CARE Households Enrolled	Households Requested to Verify ^{[3][4]}	% 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%	694	7	701	79.7%	0.1%
February	1,314,552	90	0.0%	72	0	72	80.0%	0.0%
March	1,320,413	216	0.0%	110	0	110	50.9%	0.0%
April	1,322,312	359	0.0%	213	2	215	59.9%	0.0%
May	1,335,896	122	0.0%	51	1	52	42.6%	0.0%
June	1,329,379	111	0.0%	54	2	56	50.5%	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	1,360,030	9	0.0%	0	0	0	0.0%	0.0%
October								
November								
December								
YTD Total	1,360,030	1,873	0.1%	1,194	12	1,206	64.4%	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.

^[4] SCE is currently investigating the verification requests 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 4 - Enrollment by County
Southern California Edison
Through September 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	42	0	42	7%	0%	7%
Imperial	0	280	280	0	28	28	0%	10%	10%
Inyo	10	1,573	1,583	39	1,000	1,039	390%	64%	66%
Kern	12,355	15,987	28,342	10,665	15,121	25,786	86%	95%	91%
Kings	0	8,253	8,253	188	10,071	10,259	0%	122%	124%
Los Angeles	515,528	2,869	518,397	553,361	2,509	555,870	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	180,273	0	180,273	90%	0%	90%
Riverside	91,187	89,224	180,411	97,881	106,122	204,003	107%	119%	113%
San Bernardino	182,914	38,940	221,854	210,051	42,254	252,305	115%	109%	114%
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	14,287	48,681	62,968	103%	116%	113%
Ventura	63,712	2,231	65,943	54,885	1,989	56,874	86%	89%	86%
Total	1,099,029	203,636	1,302,665	1,131,375	228,655	1,360,030	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 September 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%	1,297	1,079	45.6%	0.1%
February	1,314,552	2,020	0.2%	571	876	28.3%	0.1%
March	1,320,413	6,515	0.5%	1,399	3,639	21.5%	0.3%
April	1,322,312	10,947	0.8%	2,091	5,500	19.1%	0.4%
May	1,335,896	19,819	1.5%	4,381	10,766	22.1%	0.8%
June	1,329,379	29,328	2.2%	7,475	17,291	25.5%	1.3%
July	1,344,010	46,166	3.4%	8,781	4,944	19.0%	0.4%
August	1,356,862	33,055	2.4%	6,239	232	18.9%	0.0%
September	1,360,030	37,508	2.8%	3,116	116	8.3%	0.0%
October							
November							
December							
YTD	1,360,030	188,200	13.8%	35,350	44,443	18.8%	3.27%

^[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 September 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	16
ALPHA ENTERPRISES		x			-	-
APAC SERVICE CENTER	x				4	26
ARMENIAN RELIEF SOCIETY	x				-	-
ASIAN AMERICAN DRUG ABUSE PROG	x				-	-
ASIAN AMERICAN RESOURCE CENTER	x		x		5	41
ASIAN YOUTH CENTER	x				-	-
BEST PARTNERS	x				163	1,637
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		1	20
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 SOCIAL 211+	x	x			8	60
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				-	2
MENIFEE VALLEY CHAMBER OF COMMERCE		x			-	-
MEXICAN AMERICAN OPPORTUNITY		x	x		-	-
MTN COMM FAM RESOURCE CNTR	x				-	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				-	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				-	-

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

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
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					182	1,834

^[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 September 2024

Pilots	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
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⁾	\$ 42,676		\$ 42,676	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -
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 FEM&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% of 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 September 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	37%	93%	43%	57%
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
Southern California Edison
Through September 2024**

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes that have 10% or more Disconnections ^[1]
92552	2%
92661	11%
92581	29%
92317	29%
92660	30%
92657	31%
92220	34%
93255	38%
91769	39%
92347	40%

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in High Poverty (Income Less than 100% FPG) ^[2]
92266	10%
92617	11%
92341	13%
93208	21%
92403	24%
93260	24%
93519	27%
93554	29%
93207	33%
93528	39%

ZIP	Top 10 Lowest CARE Enrollment Rate for Zip Codes in DAC ^{[3][4]}
93260	24%
93519	27%
93554	29%
93207	33%
93528	39%
93265	47%
93285	50%
92347	50%
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. zip code.

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 September 2024

FERA Program:	Authorized Budget ^[1]		Current Month Expenses		Year to Date Expenses		% of Budget Spent YTD	
	Electric		Electric		Electric		Electric	
Outreach	\$ 800,244		\$ 1,320		\$ 138,151			17%
Processing / Certification Re-certification	\$ 403,858		\$ 9,260		\$ 75,216			19%
Post Enrollment Verification	\$ 127,534		\$ 1,229		\$ 7,572			6%
IT Programming	\$ 30,000		\$ 27,159		\$ 114,775			383%
Pilot(s)	\$ -		\$ -		\$ -			0%
Studies	\$ 24,000		\$ -		\$ -			0%
Regulatory Compliance	\$ 15,905		\$ -		\$ -			0%
General Administration	\$ 45,724		\$ 4,963		\$ 36,507			80%
CPUC Energy Division	\$ 4,375		\$ -		\$ -			0%
SUBTOTAL MANAGEMENT COSTS	\$ 1,451,640		\$ 43,930		\$ 372,221			26%
FERA Rate Discount	\$ 46,164,249		\$ 1,735,407		\$ 11,508,426			25%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 47,615,889		\$ 1,779,337		\$ 11,880,647			25%
Indirect Costs			\$ 6,066		\$ 54,036			

^[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 September 2024

	New Enrollment										Recertification							Enrollment			Enrollment Rate % (W/X)			
	Automatic Enrollment		Self-Certification (Income or Categorical)					Total New Enrollment ⁽¹⁾ (E+A)	Scheduled	Non-Scheduled	Automatic	Total Recertification (L+M+N)	No Response ⁽⁴⁾	Failed PEY	Failed Recertification	Other ^(5,7)	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)	Total FERA Participants		Estimated FERA Eligible ⁽⁶⁾		
	Inter-Utility ⁽¹⁾	Inter-Utility Leveraging ⁽²⁾ (B+C+D)	Combined (F+G+H+I)	Online	Paper	Phone	Capitation																Combined (F+G+H+I)	(E+A)
January	2	0	2	531	36	122	1	690	15	8	2	25	51	0	2	215	268	960	424	30,831	211,756	15%		
February	1	0	1	487	19	100	0	606	27	10	31	68	41	0	0	331	372	979	235	31,056	211,756	15%		
March	0	0	0	479	65	90	1	635	55	12	58	125	98	0	0	349	447	1,082	188	31,244	211,756	15%		
April	1	0	1	436	45	115	1	597	10	13	3	26	137	0	1	416	554	1,152	44	31,298	211,756	15%		
May	0	0	0	419	68	84	0	571	22	13	0	35	24	0	1	256	281	852	290	31,578	211,756	15%		
June	0	0	0	446	49	75	0	570	44	55	0	99	130	1	5	616	772	1,342	-202	31,376	211,756	15%		
July	0	2	2	750	53	91	0	894	94	101	36	231	223	2	7	204	436	1,332	460	31,836	211,756	15%		
August	0	1	1	1,059	144	163	0	1,366	193	96	150	439	428	0	9	588	1,025	2,392	342	32,178	211,756	15%		
September	0	0	0	718	30	88	0	836	131	42	271	444	693	0	3	373	1,069	1,905	-233	31,945	211,757	15%		
October																								
November																								
December																								
YTD Total	4	3	0	5,225	509	928	3	6,765	591	350	551	1,492	1,845	3	28	3,348	5,224	11,996	1,548	31,945	211,757	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 September 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	31,945	3	0.0%	0	0	0	0.0%	0.0%
October								
November								
December								
YTD Total	31,945	384	1.2%	140	4	144	37.5%	0.5%

^[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 September 2024

Month	Total FERA Households Enrolled	Households Requested to Verify ^{[3][4]}	% 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%	1	0	1	100.0%	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	31,945	0	0.0%	0	0	0	0.0%	0.0%
October								
November								
December								
YTD Total	31,945	14	0.0%	9	0	9	64.3%	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.

^[4] SCE is currently investigating the verification requests 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 4 - Enrollment by County
Southern California Edison
Through September 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	29	29	0%	15%	15%
Kern	1,652	2,137	3,789	278	244	522	17%	11%	14%
Kings	0	1,581	1,581	1	233	234	238%	15%	15%
Los Angeles	84,267	469	84,736	11,415	118	11,533	14%	25%	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	35	35	0%	6%	6%
Orange	30,616	0	30,616	4,828	0	4,828	16%	0%	16%
Riverside	15,529	15,194	30,723	2,551	3,243	5,794	16%	21%	19%
San Bernardino	32,275	6,871	39,146	5,181	911	6,092	16%	13%	16%
San Diego	0	0	0	0	0	0	0%	0%	0%
Santa Barbara	2,206	0	2,206	208	0	208	9%	0%	9%
Tulare	1,929	5,818	7,747	242	865	1,107	13%	15%	14%
Ventura	10,019	351	10,370	1,497	63	1,560	15%	18%	15%
Total	178,591	33,165	211,756	26,204	5,741	31,945	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 September 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%	31	37	41.3%	0.12%
February	31,056	52	0.2%	5	30	9.6%	0.10%
March	31,244	148	0.5%	10	132	6.8%	0.42%
April	31,288	330	1.1%	25	251	7.6%	0.80%
May	31,578	628	2.0%	67	488	10.7%	1.55%
June	31,376	1,096	3.5%	103	671	9.4%	2.1%
July	31,836	1,361	4.3%	138	205	10.1%	0.6%
August	32,178	762	2.4%	78	7	10.2%	0.0%
September	31,945	801	2.5%	25	10	3.1%	0.0%
October							
November							
December							
YTD	31,945	5,253	16.4%	482	1,831	9.2%	5.73%

^[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 September 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 SOCAL 211+	x	x			-	-
KERNVILLE UNION SCHOOL DISTRIC	x				-	-
KINGS COMMUNITY ACTION ORG	x				-	-
KINGS CTY COMMISSION ON AGING	x				-	-
LA COUNTY HOUSING AUTHORITY		x			-	-
LEAGUE OF CALIF HOMEOWNERS	x				-	-
LIFT TO RISE	x				-	-
LTSC COMM. DEVEL. CORP	x				-	-
MENIFEE VALLEY CHAMBER OF COMMERCE		x			-	-
MEXICAN AMERICAN OPPORTUNITY		x	x		-	-
MTN COMM FAM RESOURCE CNTR	x				-	-
NEW GREATER CIR. MISSION, INC	x				-	-
NEW HOPE VILLAGE, INC	x				-	-
NEW HORIZONS CAREGIVERS GROUP		x			-	-
OCCC	x				-	-
OPERATION GRACE	x				-	-
OUR COMMUNITY WORKS	x				-	-
PACIFIC ISLANDER HLTH (PIHP)	x				-	-
PACIFIC PRIDE FOUNDATION	x				-	-
PRM CONSULTING, INC.	x	x	x		-	1
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.