**BEFORE**

**THE PUBLIC UTILITIES COMMISSION OF THE**

**STATE OF CALIFORNIA**

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

# ANNUAL REPORT OF SOUTHERN CALIFORNIA EDISON COMPANY (338-E) ON ENERGY SAVINGS ASSISTANCE AND CALIFORNIA ALTERNATE RATES FOR ENERGY PROGRAMS FOR 2025


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Dated: **May 1, 2026**

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This Annual Report presents the 2025 program year results and expenditures for Southern California Edison Company's (SCE) Energy Savings Assistance (ESA) and the California Alternate Rates for Energy (CARE) programs. SCE filed its Annual Report for the Family Electric Rate Assistance (FERA) program on March 2, 2026 as required by Senate Bill (SB) 1130. The purpose of this report is to provide the 2025 results and expenditures for ESA and CARE programs, describe SCE's activities in furtherance of these programs, and to provide any relevant updates to the FERA Annual Report, including associated tables.

Respectfully submitted,

*/s/ Joel Mallord*

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**May 1, 2026**

# Program Year 2025

# Southern California Edison
# Low Income Annual Report
## May 1, 2026

SOUTHERN CALIFORNIA EDISON®
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# SOUTHERN CALIFORNIA EDISON

# ANNUAL REPORT
# ON
# ENERGY SAVINGS ASSISTANCE (ESA)
# AND
# CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE)
# PROGRAMS

## 2025 RESULTS

**ESA AND CARE PROGRAMS 2025 ANNUAL REPORT ACTIVITIES**
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# EXECUTIVE SUMMARY

Southern California Edison Company (SCE) offers a range of programs designed to help customers reduce their energy bills, become more energy efficient, and receive payment arrangements or financial assistance during periods of hardship. Two of these long-standing programs—both focused on helping income-qualified residents—are covered in this annual report: Energy Savings Assistance (ESA) and California Alternate Rates for Energy (CARE).[1] Together, these programs directly benefit low-income customers by reducing their energy bills, increasing the health, comfort and safety of their homes, and promoting energy education and efficiency practices that lead to resource adequacy and a lower carbon footprint. Program budgets and goals for the July 1, 2021 through December 31, 2026 period, were authorized in Decision (D.)21-06-015, which provides the foundational parameters for this report. All program accomplishments and expenditures herein relate to calendar year 2025 up to and including December 31, 2025.

**Energy Savings Assistance (ESA) Program**

During Program Year (PY) 2025, SCE continued to operate its ESA program using the new "deeper energy savings model" that prioritizes both customers with higher energy usage and certain hard-to-reach customer segments.[2] In PY 2025, the ESA Program Portfolio treated 65,442 homes, which represents 110% of target number of annual homes treated and spent 101% of its unspent and uncommitted authorized budget. In addition, through the ESA Program Portfolio, customers saved approximately 26.9 gWh, which represents 80% of the annual energy savings goal. This performance reflects combined contributions across the ESA Program Portfolio, including the ESA Main program, the Southern Multifamily Whole Building (MFWB) program, and the ESA Building Electrification (BE) pilot.

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1 SCE filed the Annual Report for the FERA Program on March 2, 2026. Additionally, SCE has provided monthly reports for CARE and LIEE (now ESA) since 2001. *See* D.01-95-033, Ordering Paragraph (OP) 17. SCE began including monthly FERA metrics beginning in 2022. *See* D.21-06-015, p. 435.

2 D.21-06-015, p. 116.

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

In PY 2025, the CARE program ended the year with 1,364,107 income-qualified households enrolled, representing 106% of the estimated eligible population and providing more than $867 million in financial assistance.

# ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL REPORT

## 1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY

**Summary of 2025 Results**

The ESA program serves SCE's low-income customers within its 50,000 square-mile service area. The objective of SCE's ESA program is to help income-qualified customers reduce their energy consumption and costs while increasing their health, comfort, and safety at no cost to them. Through the ESA program, SCE offers several energy-efficient appliances to income-qualified customers, including energy-efficient refrigerators, air conditioners, and home-efficiency solutions like weatherization that can help customers save energy and money. Throughout 2025, SCE offered two programs and three pilot programs under its ESA umbrella. The current programs are ESA Main, which is available to income-qualified customers living in single-family or mobile homes (MH); MFWB program, which is available to customers in multifamily dwellings; and the ESA Whole Home (ESA WH) pilot, for high-energy, income-qualified users. SCE also administers the ESA BE pilot and administered the ESA Clean Energy Homes (CEH) pilot through its closing at the end of 2025. To be eligible for an ESA program or pilot, a customer may be a homeowner or renter, and must meet the program's income guidelines, which are established, and updated annually, by the California Public Utilities Commission (CPUC or Commission). Specific measures offered in each program or pilot are determined by various conditions, including the presence of existing appliances to be replaced and the feasibility of installation in each eligible home.

In D. 21-06-015, the Commission approved a new framework for the ESA Main program that focused on achieving deeper energy savings per home versus number of homes treated and included new energy savings goals.[3] The following program-wide changes were implemented in 2023 and continued in PY 2025.

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

[3] D.21-06-015, p. 116.

Light-Emitting Diodes (LEDs) lighting, smart power strips, refrigerators, smart communicating thermostats (SCT), clothes washers, dishwashers, freezers, pool pumps, evaporative coolers, weatherization services, and heat pump water heaters (HPWH), 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 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 HPWHs to replace gas and propane fueled systems where feasible. The ESA program along with the SCE-approved contractors are actively working to educate SCE customers about the benefits of electrification through these new program offerings.

During reconciliation activities associated with this Annual Report, SCE identified potential contractor overpayments related to ESA program expenditures and shared this information with Energy Division (ED) Staff in March 2026. SCE is continuing its analysis to validate the extent of the issue and determine appropriate corrective actions. When SCE finalizes the calculation, it will update or correct any Annual Report information affected by this review.

## Procedural Background

On June 7, 2021, the Commission issued D.21-06-015, which approved the applications of the investor-owned utilities (IOUs) and authorized program budgets and requirements for the administration of the ESA, CARE and FERA Programs for the 2021-2026 program cycle. Most significantly, the Decision approved programmatic changes for the ESA program, including the authorization of two SCE-specific pilots – the BE and the CEH pilots, as well as the MFWB Program. The MFWB is led by San Diego Gas & Electric Company (SDG&E) on behalf of SDG&E, SCE and Southern California Gas Company (SoCalGas) and provides energy

efficiency (EE) measures for multifamily properties, benefiting both the property owners and residents where applicable.

Additionally, the Decision approved ED's Staff Proposal for the ESA Pilot Plus/Pilot Deep also referred to as the ESA WH Pilot, a redesign concept of the ESA Program aimed at achieving deeper energy savings for higher energy use households.

Among other things, D.21-06-015 revised fund shifting rules, established cost effectiveness guidelines, approved IOU-tailored marketing and outreach strategies, including coordination and leveraging efforts with local, state, and federal agencies for water, telecommunications, and other low-income assistance programs, such as the Low Income Home Energy Assistance Program (LIHEAP).

This report highlights SCE's program initiatives and activities that address the Commission's guidance and directives for managing the portfolio of low-income programs.

## 1.1 Energy Savings Assistance Program Overview

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

**ESA Main**

| ESA Table 1.1.1.1<br>2025 Main ESA SF, MH Program Summary | | | |
|---|---|---|---|
| | 2025 Authorized Budget / Forecasted Planning Assumptions | 2025 Actual | % |
| Budget | $ 64,009,981 | $ 71,796,791 | 112% |
| Administrative Budget[4] | $ 7,179,679 | $ 5,332,824 | 74% |
| Homes Treated | 59,512 | 55,198 | 93% |
| kWh Saved | 33,507,277 | 20,697,740 | 62% |
| kW Demand Reduced | 13,451 | 3,299 | 25% |
| Therms Saved | 363,961 | 78,195 | 21% |

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

| ESA Table 1.1.1.1<br>2025 Main ESA SF, MH Program Summary | | | |
|---|---|---|---|
| | 2025 Authorized Budget / Forecasted Planning Assumptions | 2025 Actual | % |
| GHG Emissions Reduced (Tons) | NA | NA | NA |

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

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 conducted 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.

The table above summarizes the budget spent, homes treated, and savings generated for the PY. As of December 31, 2025, SCE has spent 112% of the year's ESA Main program budget. This includes both measures and Program Administrative (PA) budget categories.

Administrative expenses are capped at 10% of the program costs. For PY 2025, SCE spent 7% of program costs on administrative expenses. The calculation

more than 10 percent of total program costs on administrative costs starting in program year 2024."

of the percentage of administrative expenses has been adjusted to be consistent with the EE programs per D. 21-06-015.

***Improve and Sustain***

SCE's ESA Main Program achieved 93% of the home treated target and 62% of the kilowatt-hours (kWh) goal by December 31, 2025. In 2025, SCE significantly sustained efforts and served 55,198 customers. This represents roughly a 16% increase in the number of customers served as compared to 2024, demonstrating a substantial growth in SCE's service reach and impact of the ESA Main Program.

The SCE team worked closely with ESA contractors to maintain steady progress as the program continued in 2025. Strong yearly performance demonstrated improved collaboration across the contractor network, with a shared focus on improving operational readiness, delivering deeper energy savings, and supporting contractors with the training, tools, and guidance needed for high-quality installations. Throughout this period, SCE continued evaluating the effectiveness of recent operational changes—such as strengthened lead-management practices, improved pipeline visibility efforts, enhanced quality and documentation requirements, and expanded workforce training opportunities—to ensure the program operates efficiently and reliably. These initiatives build upon earlier strategies that remain in place, including broadening eligibility pathways, offering additional measures to more households, reinstating joint enrollments with SoCalGas, and empowering contractors to enroll customers through their own outreach. Together, these improvements and 2025 specific efforts reflect SCE's commitment to driving deeper energy savings, improving customer experience, and partnering closely with contractors to deliver the program.

The program also delivered substantial progress in key electrification and energy-saving measures. ESA exceeded its Heat Pump installation targets and contributed to statewide decarbonization objectives, earning joint recognition with the ESA BE Pilot, from the Advanced Water Heating Initiative (AWHI) for

Excellence in Advanced Water Heating. This award highlighted the program's continued leadership in expanding equitable access to efficient and emerging clean energy technologies.

Customer engagement efforts translated to meaningful program reach. The ESA marketing campaign drove broad awareness and a sustained increase in customer interest during the latter half of the year. These outcomes collectively demonstrate a high-performing year aligned with program priorities for EE, safety, equity, and customer impact.

***System Performance: iEnergy Transition & Digital Improvements***

A major operational milestone in 2025 was the full transition from the legacy Energy Management Assistance Partnership System (EMAPS) platform to the new iEnergy system, marking the successful completion of a multi-year modernization effort. This shift consolidated workflows, improved data accuracy, and enhanced program management capabilities across contractors, inspection teams, and internal operations.

During 2025, the team completed over 450 system enhancement tickets, including improvements to data validation, workflow visibility, duplicate lead checks, and vendor inventory management. These enhancements resulted in better coordination across the program ecosystem and improved the overall customer experience by streamlining project processing timelines.

The system modernization also laid the foundation for 2026 enhancement initiatives aimed at strengthening ESA's operational readiness and aligning the program with longer-term digital transformation goals.

***April 2024 Letter – Request from Stakeholders for Response Regarding ESA Program Challenges and Continued Impacts in 2025***

In April 2024, the CPUC and the Low-Income Oversight Board identified several challenges within the ESA program, prompting an official request for SCE's perspective on contractor payments, engagement, and the implementation

of a new system. SCE responded by outlining ongoing initiatives and reaffirming its commitment to addressing these concerns.

A significant milestone was achieved when SCE advanced $9 million in payments to eligible contractors by June 2024, supporting their cash flow needs during the system transition. Repayment of these advances commenced in September 2024, with $4.9 million repaid by the end of 2025. Outstanding December payments were resolved by January 2026, and no contractors defaulted on their obligations. This financial support enabled contractors to expand their operations and surpass the Homes Treated target for 2025.

Additionally, SCE filed Advice Letter (AL) 5278-E to document payments and unrecovered amounts, which was approved by the CPUC in February 2025. This action ensured regulatory clarity and facilitated appropriate cost recovery.

To enhance collaboration, SCE launched contractor forums in 2024 and convened four sessions in 2025 focused on operational updates and collecting feedback. Contractor input was instrumental in guiding improvements to the iEnergy system and shaping plans for 2026 and future program cycles. SCE also formally recognized contractors for exceeding performance goals and delivering strong results throughout 2025.

## ESA Southern MWFB Program

| ESA Table 1.1.1.2[5]<br>2025 ESA Southern MFWB Program Summary | | | |
|---|---|---|---|
| | 2025 Authorized Budget / Forecasted Planning Assumptions | 2025 Actual | % |
| Budget | $ 45,409,646 | | |
| Administrative Budget | | | |
| Multifamily Properties Treated | 260 | | |
| Multifamily Tenant Units w/in Properties Treated | 46,783 | | |

[5] This table is intentionally left blank. The information reflected in this table is a summary of Southern MFWB data across the three participating IOUs and is reported solely by SDG&E in its role as the lead utility.

| ESA Table 1.1.1.2[5]<br>2025 ESA Southern MFWB Program Summary | | | |
|---|---|---|---|
| | 2025 Authorized Budget / Forecasted Planning Assumptions | 2025 Actual | % |
| kWh Saved | 11,834,944 | | |
| kW Saved | 0 | | |
| Therms Saved | 723,721 | | |
| GHG Emissions Reduced (Tons) | NA | NA | NA |

**ESA Southern MWFB - SCE**

| ESA Table 1.1.1.3<br>2025 ESA Southern (SCE) MFWB Program Summary by IOU | | | |
|---|---|---|---|
| | 2025 Authorized Budget / Forecasted Planning Assumptions[6] | 2025 Actual | % |
| Budget[7] | $ 14,872,727 | $ 9,128,739 | 61% |
| Administrative Budget[8] | $ 1,470,080 | $ 1,104,349 | 75% |
| Multifamily Properties Treated | 80 | 33 | 41% |
| Multifamily Tenant Units w/in Properties Treated | 15,359 | 9,894 | 64% |
| kWh Saved | 10,561,043 | 3,356,022 | 31% |
| kW Saved | NA | 372 | - |
| Therms Saved | NA | 11,207 | - |
| GHG Emissions Reduced (Tons) | NA | NA | - |

*The reported 2025 Actual total of 9,894 treated units and 33 common area projects includes 6,631 units and 30 common Area projects completed in Program Year PY 2025 and 3,263 units and 3 common Area projects completed in PY 2024. These units are included in the 2025 Actual total due to delays in receiving MFWB program data.

6 2025 authorized budget includes $14,700,798 for ESA MFWB and $171,949 for ESA SPOC per D.21-06-015, Attachment 1, Table 11.

7 Pursuant to D.21-06-015, planning assumptions for energy savings goals and homes treatment targets are based on IOU allocations in Table 7 of AL 4115-E/3144-G.

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

The MFWB program delivers comprehensive EE, electrification, and health and safety improvements to income-qualified multifamily property owners and residents. Through a whole building delivery model, eligible properties that meet applicable income and building requirements may receive measures serving the entire building, common areas, and individual dwelling units. The program serves both deed-restricted and non-deed-restricted multifamily properties across the service territories of SCE, SoCalGas, and SDG&E. Program implementation is administered by Richard Heath & Associates, Inc. (RHA), a non-utility, third-party implementer.

Following completion of property-level installations, the lead utility, SDG&E, conducts post-installation inspections prior to authorizing payment. SCE receives notification of project completion after payment approval, which may result in timing differences between installation completion and reported activity. In the table above, "Properties Treated" reflects Common Area and Whole Building projects, including installations within shared spaces and/or the replacement of equipment serving the building as a shole. The table also presents SCE specific budget and planning assumptions alongside year-to-date actuals for the Southern MFWB program.

***Single Point of Contact (SPOC) Activities***

Throughout 2025, SCE's Single Point of Contact (SPOC) continued to support the MFWB program by identifying and referring eligible customers and coordinating referrals to related programs. Building on initial implementation efforts, SCE increased engagement in 2025 through regular coordination meetings with joint IOU SPOCs and close collaboration with the program implementer, RHA, to support enrollment activities and improve data sharing.

During 2025, SCE worked closely with RHA to provide customer and property data to facilitate eligibility screening and streamline enrollment processes. These efforts were intended to reduce administrative barriers and improve the timeliness of project intake. SCE's SPOC also continued to refer

multifamily property owners to complementary programs, including SCE's Charge Ready program and the Solar on Multifamily Affordable Housing (SOMAH) Program, for potential participation where appropriate.

As a result of these enhanced coordination and data-sharing efforts, program activity increased in 2025 following a slower initial start, reflecting improved cross-program alignment and more efficient referral and enrollment workflows. For context, during 2025, SCE provided RHA with five multifamily property leads, 1,980 residential leads, and 36 SOMAH program referrals. In 2025, 675 property referrals from the MFWB program have been provided to the SOMAH program.

***Program Performance***

During 2025, the MFWB program experienced increased activity as implementation efforts continued to stabilize. Program delivery expanded relative to earlier periods, with growth in the number of completed projects and treated units. SCE reports the completion of 33 common area projects and 9,894 treated units under the Southern MFWB program. Of these totals, 30 common area projects and 6,631 treated units were completed in PY 2025. The reported results also include three common area projects and 3,263 treated units completed in PY 2024. Due to significant delays in receiving Southern MFWB program data for the prior year, the associated performance data were incorporated into the 2025 reporting period.

To explain the process: once a property is enrolled and assessed, RHA provides the property owner with a list of approved common area and/or whole building program measures, known as an incentive proposal. CAM installations proceed upon confirmation from the property owner and use either an owner-selected contractor or a qualified trade ally from the designated contractor pool. Simultaneously, a subcontractor is assigned to perform the tenant unit treatment. Once the treatment passes the lead utility's inspection, invoicing can proceed.

Despite this increase in activity, the Southern MFWB program did not achieve its established goals or forecasted outcomes in 2025. The number of

completed treatments and associated energy savings continued to fall short of projections, and not all interested and eligible tenants within SCE's service territory were able to receive program services during the reporting period. Accordingly, while modest improvements were realized, overall program performance remained below anticipated levels, underscoring ongoing challenges in scaling delivery and fully meeting program demand.

***Program Challenges***

In 2025, the Southern MFWB program continued to face operational challenges that affected overall program delivery and performance. Administrative and system-related issues associated with invoicing and payment processing resulted in extended processing timelines, which contributed to variability in project pacing and production levels during portions of the reporting period.

These conditions introduced uncertainty for some subcontractors and trade allies and affected participation levels, particularly for in-unit installations. In addition, data and processing limitations intermittently extended enrollment and invoicing timelines, contributing to delays between project initiation and completion. As a result, program activity fluctuated over the course of the year, and overall performance remained below anticipated levels.

In response to ongoing program challenges, the program implementer, in coordination with the lead utility, advanced several process improvements during 2025 to strengthen program delivery and oversight. Enhancements to system automation and integration improved data accuracy, workflow efficiency, program visibility, and invoicing timeliness. Quality control and reporting improvements strengthened inspection oversight, invoice tracking, and subcontractor communication. In addition, streamlined enrollment processes and expanded subcontractor onboarding supported improved participation readiness and program delivery.

***Future Program Direction***

Looking ahead, program efforts will prioritize the completion of projects for properties that are already enrolled and have experienced extended wait times for installation. The program implementer will focus on advancing these projects through remaining stages of delivery to ensure that enrolled property owners and tenants are able to realize anticipated program benefits. Emphasis will be placed on improving project completion and resolving outstanding administrative or operational barriers that have delayed completion.

While the Southern MFWB program has demonstrated incremental progress, overall impacts to multifamily properties and tenants have been more limited than anticipated to date. SCE remains committed to improving program outcomes by continuing to provide support and directing resources toward the completion of existing program commitments. These efforts are intended to improve delivery consistency and enable more meaningful results for participating properties in future program years.

**ESA Whole Home**

| ESA Table 1.1.1.4<br>2025 ESA Whole Home Program Summary | | | |
|---|---|---|---|
| | 2025 Authorized Budget / Forecasted Planning Assumptions | 2025 Actual | % |
| Program Budget | $ 3,884,864 | $ 2,617,750 | 67% |
| Administrative Budget[9] | $ 388,486 | $ 443,531 | 114% |
| Homes Treated | 400 | 142 | 36% |
| kWh Saved (Plus = 5-15 Percent) | N/A | 18,728 | - |
| kWh Saved (Deep = 15-50 Percent) | N/A | 454,136 | - |
| kW Demand Reduced | N/A | 31.75 | - |
| Therms Saved (Plus = 5-15 Percent) | N/A | 974 | - |

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

| ESA Table 1.1.1.4<br>2025 ESA Whole Home Program Summary | | | |
|---|---|---|---|
| | 2025 Authorized Budget / Forecasted Planning Assumptions | 2025 Actual | % |
| Therms Saved (Deep = 15-50 Percent) | N/A | 9,005 | - |
| GHG Emissions Reduced (Tons) | N/A | N/A | - |

In D.21-06-015, the Commission approved a pilot-based redesign of the ESA Program, guided by recommendations from the ED to run through 2026. The restructured initiative, referred to as ESA Pilot Plus/Deep (PP/D) or ESA WH, represents a collaborative effort between SCE and SoCalGas, targeting high-usage CARE customers in shared service territories. Maroma Energy Services was selected as the program implementer in late 2022, with Illume serving as the pilot evaluator.

Strategic adjustments to marketing materials and enhanced email outreach contributed to steady progress throughout 2024. In 2025, installations increased by more than 400% compared to 2024 levels. Nine contractors are now actively managing customer leads. The separation of installation contractors from the audit process has streamlined operations in 2025, enabling contractors to focus exclusively on installation and post-installation activities.

Despite these advancements, both utilities continue to pursue higher installation rates and have implemented several strategies, including:

- Modifying customer segmentation and increasing the frequency of lead list updates provided to Maroma;
- SCE establishing bulk equipment purchase agreements with Maroma;
- Revising payment terms from Net 30 to Net 10 to expedite contractor reimbursement; and
- Providing Maroma with weekly usage data, based on the most recent 12 months of consumption, to ensure that percent savings meet program eligibility requirements.

These enhancements have improved operational efficiency and contractor performance. As of December 31, 2025, a total of 753 customers have enrolled, with 433 homes currently in the pipeline. Since program inception, the average cost per treated home is $13,902.

In early 2025, SCE identified reporting anomalies associated with Maroma iEnergy's system transition. The migration of data from the legacy system to the new platform resulted in periodic reporting irregularities, which SCE addressed as they arose. For example, SCE observed that, for certain Pilot Deep measures, deemed savings were reported in place of modeled savings. When such anomalies were detected, the reports noted the affected records as exception cases.

In 2025, SCE included in its bridge funding application a proposal to continue the pilot program through 2026, in accordance with D.21-06-015. The remaining funds from the pilot were recommended for transfer to ESA Main. Unless otherwise directed, SCE intends to gradually phase out the pilot during 2026 as originally established in the pilot plan. Marketing and outreach activities will be reduced, and if current lead-to-enrollment trends persist, all such activities are expected to be completed between August and mid-September. For more information on marketing and outreach please see ***Section 1.2.2***

To ensure we treat pipeline projects in 2026, ongoing training and quality audits will be priority to cut job completion times, thereby streamlining operations and accelerating enrollments, audits, and installations. Subcontractors for the pilot have expanded their teams – both in office and in the field – to handle the increased project volumes anticipated in 2026. Additionally, Maroma has strengthened its internal resources, offering continuous feedback and oversight to both subcontractors and energy auditors.

The final Joint Pilot Evaluation Study is scheduled for fall 2026 and will provide a comprehensive analysis of cost-effectiveness and bill impacts. More information on the pilot evaluation study can be found in ***Section 1.9.1***

## ESA Building Electrification

| ESA Table 1.1.1.5<br>2025 ESA Building Electrification (BE) Pilot Summary (SCE Only) | | | |
|---|---|---|---|
| | 2025 Authorized Budget / Forecasted Planning Assumptions | 2025 Actual | % |
| Budget | $ 12,115,651 | $ 13,564,417 | 112% |
| Administrative Budget | $ 1,211,565 | $ 431,629 | 36% |
| Homes Treated[10] | NA | 350 | - |
| kWh Saved | NA | (640,431) | - |
| kW Demand Reduced | NA | 44 | - |
| Therms Saved | NA | 120,771 | - |
| Claimable kWh Saved[11] | NA | 2,898,159 | - |
| GHG Emissions Reduced (Tons) | NA | NA | - |

The ESA BE pilot is an SCE-only pilot offered to income-qualified customers residing in single-family homes. While it prioritizes customers living in disadvantaged communities (DACs), it is available to all income-qualified customers within SCE's service area. The BE pilot focuses on replacing existing space and water heating systems with electric heat pump technologies, aiming to reduce energy costs and Greenhouse Gas (GHG) emissions. In limited cases, participating homes may also receive additional electrification measures, such as induction cooking equipment, energy-efficient electric clothes dryers, and electrical panel upgrades, where feasible.

In 2025, SCE continued to build on prior- year implementation efforts, with a focus on increasing productivity, strengthening customer engagement, and enhancing the overall customer experience. The BE pilot maintained an active and stable pipeline of projects across enrollment, installation, and final verification

[10] The Homes Treated number represents the number of projects that had the final verification performed by SCE in 2025.

[11] 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/energydivision/documents/building-decarb/fuel-substitution-technical-guide-v11.docx.

stages, reflecting continued customer interest and acceptance of comprehensive electrification solutions. Targeted outreach, education, and engagement activities played a key role in supporting sustained participation and pipeline growth, while coordination with implementation partners supported ongoing delivery. For more information on the customer targeting approach for the BE pilot, refer to ***Section 1.2.2.***

Evaluation of the BE pilot remains a key component of SCE's efforts to expand ESA offerings through electrification. Interim evaluation findings indicate that participating customers experienced average annual reductions in total utility costs when considering combined electric and gas bills, providing early evidence of bill savings potential under the pilot. Ongoing data collection and analysis are intended to inform effective targeting strategies, assess customer outcomes, and support coordination with external partners to enhance value without exceeding authorized scope. Evaluation activities and findings are discussed in more detail in subsequent sections, including ***Section 1.9.1***.

**ESA Clean Energy Homes**

| ESA Table 1.1.1.6<br>2025 ESA Clean Energy Homes Pilot Summary (SCE Only) * | | | |
|---|---|---|---|
| | **2025 Authorized Budget / Forecasted Planning Assumptions** | **2025 Actual** | **%** |
| Budget | $ 1,661,000 | $ 286,686 | 17% |
| Administrative Budget | NA | NA | - |
| Homes Treated | NA | NA | - |
| kWh Saved | NA | NA | - |
| kW Demand Reduced | NA | NA | - |
| Therms Saved | NA | NA | - |
| GHG Emissions Reduced (Tons) | NA | NA | - |

* CEH does not track home treatments or installations, as it is a Design Assistance and Tenant Education Incentive program.

The ESA CEH pilot was an SCE-only pilot that intended to offer 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. This pilot supported the state's ambitious GHG reduction goals and strives to bring environmental equity to vulnerable customers. It offered technical design assistance, location-specific GHG-driven financial incentives, coordinated education, and outreach to overcome barriers to affordable all-electric construction.

Pursuant to D.21-06-015, CEH was restricted to geographic areas not served by SoCalGas, PG&E, SDG&E, and Southwest Gas Corporation, limiting eligibility to Catalina Island, Long Beach, Vernon, and portions of Inyo and Mono counties. The pilot was also available to properties or buildings that did not meet the Building Initiative for Low Emissions Development (BUILD) program's low-income community/DAC criteria.

As reported in 2024, these geographic constraints significantly hindered project recruitment and enrollment. Despite best efforts to enhance interest in the pilot, interest remained low, with only eight total project applications submitted since pilot launch. In January 2025, SCE and its implementer began executing the ramp-down plan, outlining work in progress, project statuses, and expected incentive payment timelines. All participants were informed of the program's closure by the end of 2025. All recruitment efforts were concluded, and no additional program enrollments were secured. All remaining pilot budget will be reallocated to support other ESA program activities.

SCE completed all ramp down activities in December 2025. The final milestone payment for the program's single design incentive and outstanding tenant education incentives claims have been processed for payment.

Information and details associated with evaluation of the CEH pilot are described in ***Section 1.9.1***.

**SASH and MASH**

| ESA Table 1.1.1.7<br>2025 Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) Unspent Funds (Electric IOUs Only)[12] | | | |
|---|---|---|---|
| | **2025 Authorized** | **2025 Actual** | **%** |
| Budget | N/A | N/A | N/A |

SCE received approval of AL 5106-E to transfer the unused administrative and incentive Single Family Affordable Solar Homes (SASH) and Multifamily Affordable Solar Housing (MASH) program funds to the Energy Savings Assistance Program Adjustment Mechanism (ESAPAM) consistent with the requirement outlined in D.15-01-027, OP 12.[13] SCE fully utilized these funds to provide energy-efficiency measures and services to single family and mobile homeowners and renters at no cost to qualifying low-income customers as required by Public Utilities Code Section 2852(c)(3) by year-end 2024. No additional updates during PY2025.

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

### 1.2.1 Provide a summary of the segmentation strategy employed (i.e., tools and analysis used to segment households and prioritized for

[12] D.15-01-027, OP 12 states "The Program Administrators shall ensure that program expenditures in each utility's service territory do not exceed the total authorized budget amounts over the duration of the programs. The program incentive budgets will be available until all funds are exhausted or until December 31, 2021, whichever occurs first. Any money unspent and unencumbered on January 1, 2022, shall be used for "cost-effective energy efficiency measures in low-income residential housing that benefit ratepayers," as set forth in Public Utilities Code Section 2852(c)(3)." The electric IOUs plan to file a Joint Advice Letter for disposal of unspent funds from the SASH and MASH programs to the ESA Program. Joint IOUs plan to file Advice Letter in Quarter 1 of 2024. After the Advice Letter is filed, budget authorization will be pending per Energy Division disposition of Advice Letter.

[13] PG&E and SCE AL PG&E 7028-E/ SCE 5106-E was approved with an effective date of October 20, 2023.

**treatment, and how this information is communicated to the contractor/CBO).**

**ESA Main (SF, MH) Program Contractor Outreach**

In 2025, SCE maintained its collaboration with ESA contractors to evaluate residences and provide ESA program services within local communities. This year, ESA marketing campaigns adopted a 2-Touch Wave email strategy, complemented by direct mail and multi-platform media outreach. Email communications commenced in late June, followed by the launch of media campaign in August. Marketing efforts were directed toward customers identified as having a higher probability of needing and qualifying for ESA program services, using an ESA propensity score. As a result, SCE.com recorded 22,000+ lead submissions to help support the efforts of the ESA contractors.

The following are ways SCE prioritized customer segments for treatment and provided this information to contractors at various times throughout PY 2025:

- SCE aggregated leads in targeted geographic areas and then allocated these leads among contractors who worked in those specific areas. The SCE-generated leads included those customers that contacted the customer contact center (CCC) as well as those that signed up on the ESA webpage on SCE.com. This practice of providing contractors with SCE-generated contractor leads continued throughout 2025.
- SCE sent targeted Direct Mail letters and emails to customers to inform them that they may qualify for the ESA program. These SCE monthly marketing campaigns focused on specific ZIP codes that the ESA contractors were targeting and needed additional lead-generation support from in that given month. These marketing activities help convert customers to leads and then were provided to ESA contractors so that they can contact interested customers and enroll them into the ESA program.

Prior to a contractor contacting customers, SCE sent customers emails and direct mail letters with their respective assigned contractor's contact information,

encouraging them to call to set up an appointment. Sending a comprehensive mix of communication materials prior to and possibly following the initial contact by the contractor provided context and built trust for the customer, thus increasing response and enrollment.

In addition to providing SCE-generated leads to ESA contractors, 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 enrollment activities such as canvassing neighborhoods, door knocking, participating in community events, and other outreach activities that reach income-qualified customers. As a result of those contractor outreach and joint utility leveraging efforts, ESA contractors generated over 53,100 leads throughout PY 2025.

**Southern Multifamily Whole Building (MFWB) Program**

In 2025, outreach strategies for the Southern MFWB program emphasized stronger coordination, data-driven targeting, and cross-program referrals to support enrollment and stabilize program delivery, with a particular focus on improving alignment among the investor-owned utilities and the third-party implementer. These efforts included enhanced collaboration and data sharing, refined outreach approaches to identify and engage eligible multifamily property owners, increased use of referrals from related programs such as SOMAH, and closer involvement by utility Single Points of Contact to support property owner engagement and enrollment workflows, collectively contributing to increased participation and improved program performance during the year.

The increase in program activity observed in 2025 reflects continued coordination among the investor-owned utilities (IOUs) and the program implementer, as well as targeted efforts to support enrollment and improve project delivery. These efforts included enhanced collaboration, refined outreach strategies, and adjustments intended to improve program execution. Collectively, these actions contributed to measurable, incremental progress during the reporting

period, indicating increased stabilization of program operations compared to earlier implementation phases.

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

**ESA Whole Home Pilot Targeting**

Customer segmentation modifications maximize the potential for eligible customers which are sent to Maroma quarterly, supporting continued growth in participation. Maroma's targeted marketing—email campaigns for customers with registered addresses and direct mail for others—has significantly improved response rates, more than doubling since February 2024. Co-branded materials from Maroma, SCE, and SoCalGas continue to enhance credibility, and door-to-door outreach paired with direct mail has proven highly effective. Customers are currently targeted by:

- Residing in Los Angeles, San Bernardino, or Riverside counties, and
- A current CARE customer at the time of reporting
- 200% above baseline for electricity and 100% above baseline for gas

# Sample Letter

Energy Savings Assistance Program WHOLE HOME | MAROMA ENERGY SERVICES | SOUTHERN CALIFORNIA EDISON Energy for What's Ahead | SoCalGas

Hello [Customer Name],

As a residential customer of both Southern California Edison (SCE) and Southern California Gas Company (SoCalGas), you may be eligible for the Energy Saving Assistance (ESA) Whole Home Program. Whether you rent or own your home, this program offers energy-efficient home upgrades and appliances at no cost. Upgrades made through this program may lower your energy bills and make your home more energy efficient and comfortable.

If you are eligible, upgrades may include:

- New energy-efficient appliances including refrigerator, freezer, dishwasher, and clothes washer
- Heating and A/C system upgrades
- New double pane windows
- LED lighting
- And more!

**Let us know you're interested** by calling 833-367-5497 or submitting an online interest form at maromaesa.com. Use the access code **03020000**.

SCE has contracted with MAROMA Energy Services to implement and manage the ESA Whole Home program on behalf of SCE and SoCalGas.

**How it works**

Once you have confirmed your interest, a MAROMA Energy Services team member will be in touch to review the program and schedule a home visit to begin the process.

During the home visit, a team member will review your eligibility and, if eligible, assess your home to identify potential upgrades that could help you save energy. From there, we will work with you to set up a project plan and schedule work to be performed on your home. The program covers all equipment and installation costs for recommended and installed upgrades.

This program is only available to select income-eligible households in select areas. Funding for the program is limited and available on a first-come, first-served basis.

Best regards,

MAROMA Energy Services

Upland, CA
833-367-5497
maromaesa.com



# Sample Postcards 1-3

Email campaigns launched in April 2024 led to higher response rates in 2025. Customers provided accurate contact information, making it easier for contractors to assess and schedule promising leads. These campaigns helped identify the most qualified customers for enrollment and targeted groups by geography, reducing travel time for auditors and installation crews to maximize efficiency.

**ESA Whole Home Progress**

**(January 1 - December 31, 2025)**

| Project Status | Number of Homes |
|---|---|
| In Progress *(Enrollment phase)* | 37 |
| Pending Approval *(Enrolled, Pending Review and Approval)* | 261 |
| Enrolled/Installed *(Audit, Savings Verified, Treated, Testing, and Permits)* | 135 |
| Completed (Invoiced) | 170* |
| De-Enrolled (*Min Savings not met, Refused to Participate, Exceeds Mitigation cap)* | 150* |

*not included in current pipeline

**ESA BE Pilot**

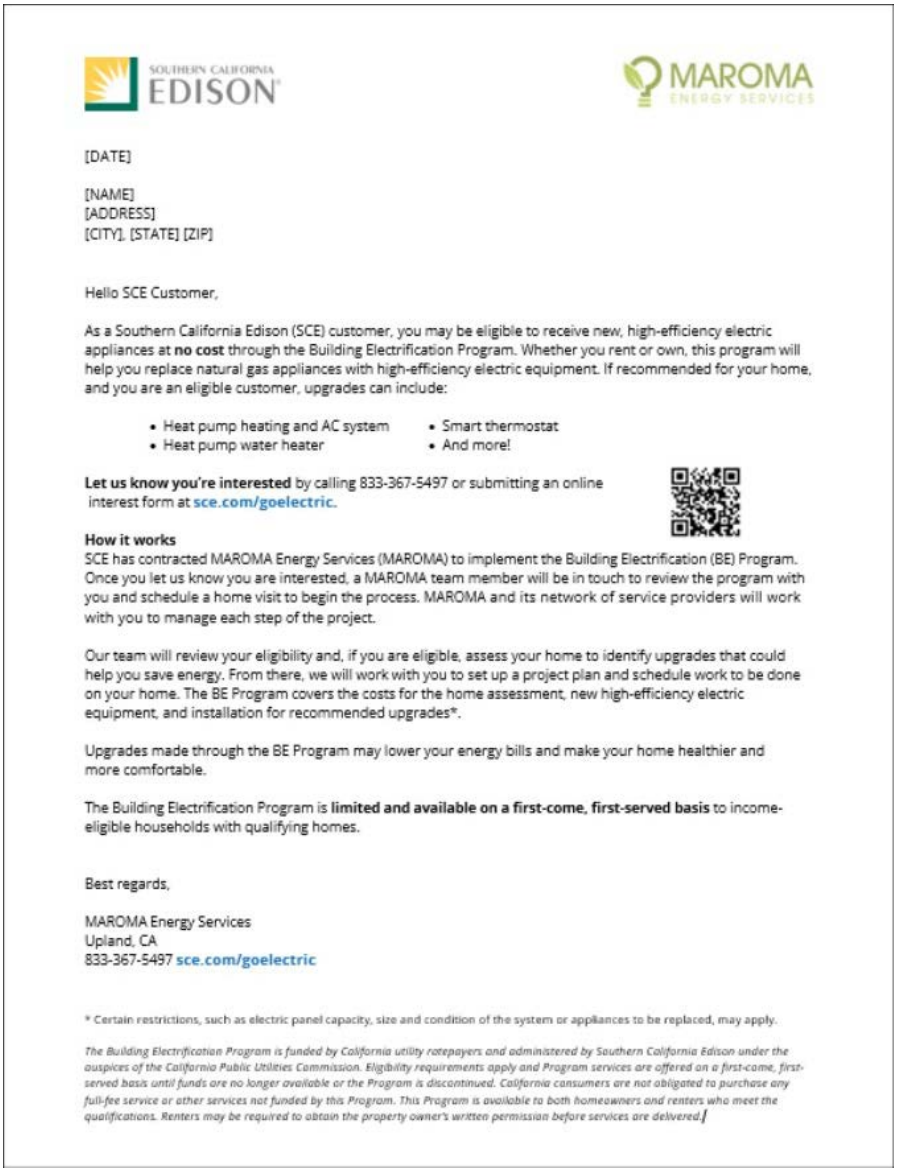
In 2025, SCE continued to advance a coordinated targeting and marketing strategy for the BE pilot designed to sustain customer engagement, support program scale-up, and maintain a strong and stable project pipeline. Building on earlier pilot efforts, outreach activities emphasized clear program messaging, multiple customer touchpoints, and a combination of direct, digital, and community-based engagement approaches. Together, these efforts supported consistent customer awareness and participation across the year.

**Customer-Centered Direct Outreach Strategy**

Direct customer outreach remained a foundational element of the BE Pilot's marketing approach in 2025. SCE deployed a sequence of coordinated mail and email communications designed to introduce the pilot, reinforce program benefits, and encourage customer follow-through. Outreach included targeted letters, follow-up emails, and postcards delivered to income-qualified customers

identified through SCE's Customer Insights predictive models. These models incorporated geographic and demographic factors, such as location, financial indicators, and homeownership status, to optimize outreach effectiveness. Communications were sequenced to reinforce awareness across multiple touchpoints and provide customers with sufficient time to consider participation. Field-based outreach further complemented these efforts, with the implementer and its subcontractors conducting door-to-door canvassing to engage customers who had expressed interest or required additional assistance navigating the enrollment process.

**Sample of ESA BE Pilot Letter**



SOUTHERN CALIFORNIA EDISON®

MAROMA ENERGY SERVICES

[DATE]

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

Hello SCE Customer,

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

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

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

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

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

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

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

Best regards,

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

* Certain restrictions, such as electric panel capacity, size and condition of the system or appliances to be replaced, may apply.

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

## Sample BE Pilot Emails

EDISON
Energy for What's Ahead

GO ELECTRIC AT NO COST

Dear Arielle,

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) Systems
- Heat Pump Water Heaters
- ENERGY STAR® Electric Clothes Dryer
- Induction Cooking Appliances
- Weatherization (insulation and sealing)
- And more!

MAROMA ENERGY SERVICES

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 | Start / Stop Service | Outage Alerts
Go Paperless | View / Report Outages | Stay Safe

Privacy Notice | Terms and Conditions | Contact Us

EDISON
Energy for What's Ahead

UPGRADE TO ELECTRIC FOR FREE

Dear ,

You may be eligible for the Southern California Edison's (SCE) Building Electrification program! If you qualify, you may receive more than $20,000 in energy-saving home upgrades, heat pump water heaters, heat pump HVAC systems, and other energy-efficiency improvements – all at no cost to you.*

Funding is limited, so don't wait! Sign up for a free assessment today to see if you qualify.

Sign Up

**How It Works:**

The Building Electrification program offers a unique opportunity to replace old, inefficient gas appliances with high-efficiency electric equipment at no-cost. This program is designed to help you save money on energy bills while enjoying comfortable and efficient living conditions. Both owner-occupied and rental properties are eligible, so don't miss this chance to upgrade your home today! Home upgrades may include:

- Heat Pump Heating, Ventilation and Air Conditioning (HVAC) Systems
- Heat Pump Water Heaters
- ENERGY STAR® Electric Clothes Dryer
- Induction Cooking Appliances
- Weatherization (insulation and sealing)
- And more!

**Save Money by Going Electric**

Going electric benefits you, your family, and your community. Modern electric appliances are 3-5 times more efficient than gas appliances. They're better for the environment, may lower your energy bills, and can improve your health, safety, and comfort at home.

Learn More

MAROMA ENERGY SERVICES

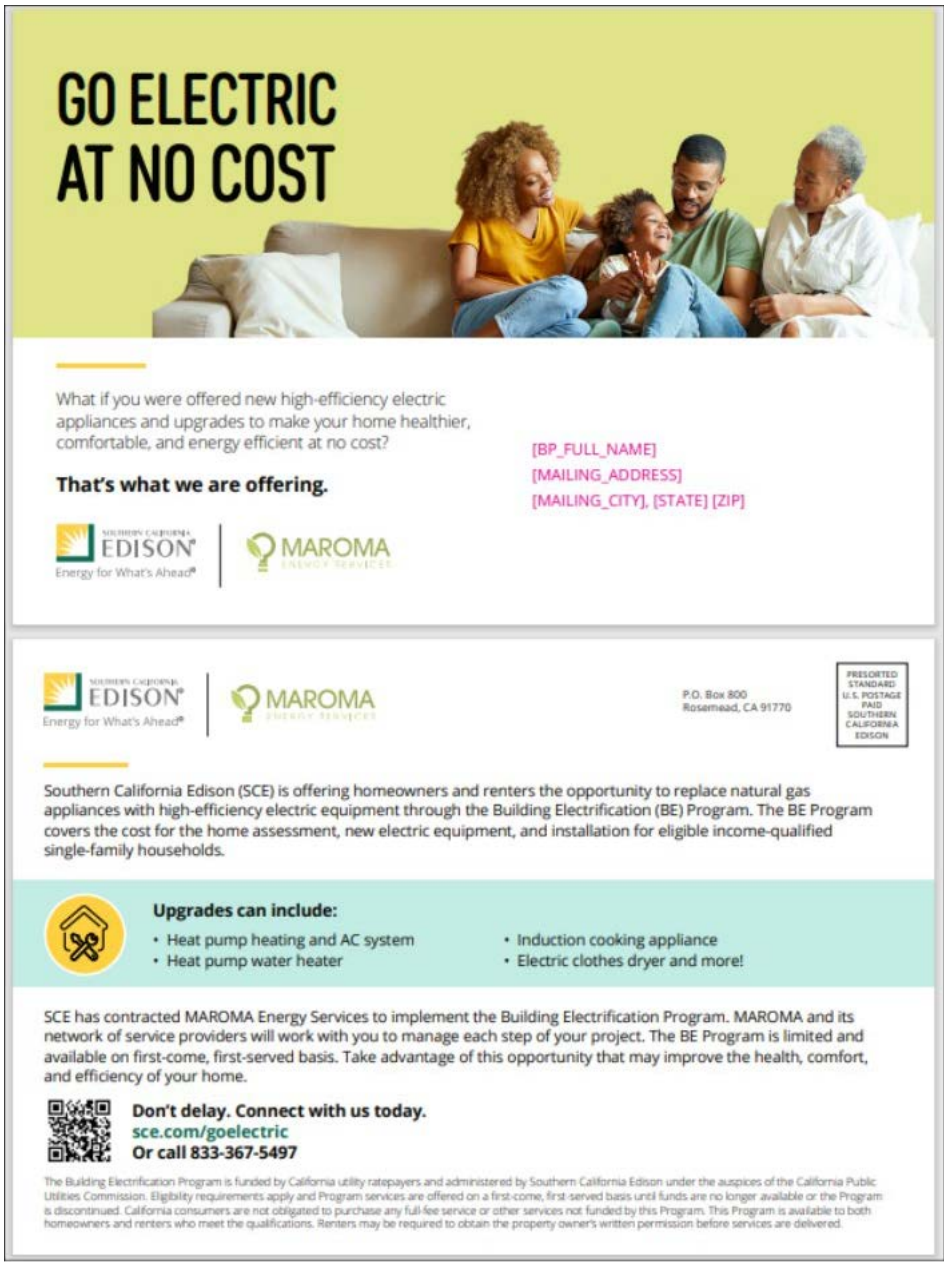
SCE has contracted MAROMA Energy Services to implement the Building Electrification (BE) Program. MAROMA and its network of service providers will guide you and manage each step of your project. The Building Electrification Program is available to income-qualified customers with eligible single-family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

Sincerely,

Veronica Saakyan

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

**Sample BE Pilot Postcard**




## Digital Marketing and Campaign Optimization

In 2025, SCE expanded the BE Pilot's outreach strategy to include a more sustained and intentional use of digital marketing channels. Paid search and social media campaigns were deployed to complement direct outreach efforts and help maintain a steady flow of customer leads throughout the year.

Digital campaigns were designed to reach customers actively searching for electrification-related topics and energy assistance, using keywords and messaging related to heat pumps, appliance upgrades, and energy savings. Campaigns were offered in both English and Spanish and directed customers to the BE Pilot implementer's website, where customers could learn more about the program and submit an interest form.

These digital efforts allowed SCE to reinforce program visibility between direct outreach touchpoints and provided an additional channel for customers to engage with the BE Pilot at their own pace.

**Sample Paid Search**


**Sample Social Media Ad**



**Community-Based and Event-Driven Outreach**

To supplement direct and digital marketing efforts, SCE incorporated community-based outreach and event participation into the BE Pilot's 2025 strategy. These activities focused on customer education, trust-building, and

reinforcing the benefits of home electrification within broader clean energy conversations.

In 2025, SCE promoted the BE Pilot through a mix of community webinars, workshops, and in-person events. Outreach included participation in a City of Irvine Earth Month virtual webinar, where the BE Pilot was featured alongside broader energy education efforts, as well as an income-qualified and clean energy programs workshop that highlighted BE eligibility, benefits, and enrollment pathways. SCE also engaged customers at community events such as the Gateway Cities Energy Resource Fair, providing BE Pilot information within a broader "energy savings" context, and participated in the 5th Annual Low Income Clean Energy Workshop, where the BE Pilot was showcased alongside complementary income-qualified offerings. Collectively, these engagements allowed SCE to align BE Pilot messaging with related initiatives and to connect customers to additional clean energy programs and resources.

**Supporting Program Awareness Through Web Content**

SCE also supported BE Pilot outreach by enhancing its online presence in 2025. Updates were made to several SCE webpages to feature information about BE and to clearly reference the BE Pilot as a participation pathway for income-qualified customers. These updates provided customers with accessible, self-guided information to complement outreach campaigns and field engagement.

**Progress Toward Objectives and Pipeline Status**

Collectively, the 2025 targeting and marketing activities supported strong momentum for the BE Pilot and contributed to sustained customer participation. As of year-end, the BE Pilot completed 470 comprehensive BE retrofits since program launch in 2023, with the majority of these installations, 350 homes, completed during the 2025 PY. This concentration of activity in 2025 reflects a notable increase in program scale compared to prior years. In addition, 691

projects were in various stages of implementation at year-end, indicating a robust and active pipeline entering the next PY.

These results demonstrate that SCE's integrated outreach strategy, combining direct communications, digital engagement, field outreach, and community-based education, effectively supported the BE Pilot's objectives and positioned the program for continued progress.

**ESA BE Pilot 2025 Program Year Results**

**(January 1 - December 31, 2025)**

| Project Status | Number of Homes |
|---|---|
| Enrollment phase (home assessment, scope development, etc.) | 283 |
| Installation in progress (procuring equipment and permits, electrical upgrades, etc.) | 311 |
| Installations complete, pending final documentation (completing Title 24, permit inspection, etc.) | 97 |
| **Subtotal** | **691** |
| Homes Treated | 350 |
| **TOTAL** | **1,041** |

**ESA CEH Pilot**

As detailed in the CEH section of this report, the primary objective for 2025 was to fully close out the CEH pilot. All program activities, including decommissioning the pilot website, were completed in December 2025.

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

**ESA Program – Direct Marketing to Customers**

In 2025, SCE implemented various marketing strategies to engage residential customers with high energy usage and energy burdens. By leveraging a propensity model, SCE effectively targeted the most promising segments for ESA

participation. This targeting and segmentation approach streamlined customer acquisition campaigns by using predictive statistical analytics to identify non-ESA enrolled prospects most likely to qualify for ESA enrollment. The methodology described below was employed to select and prioritize the best candidates for ESA direct mail and email marketing campaigns. In addition, SCE adopted a comprehensive targeting and segmentation strategy for media campaigns, utilizing first-, second-, and third-party data to identify customers based on their behaviors, context, and website interactions. This methodology involved engaging lookalike audiences reflective of previous SCE IQP program participants and incorporating ESA propensity scores to reach customers across multiple platforms.

This direct targeting strategy utilized predictive statistical models to estimate the likelihood of non-ESA enrolled residential customers based on their socioeconomic, demographic, and geographic profiles. The statistical analysis generated an estimated probability of a household being approved for ESA enrollment. Outreach efforts were prioritized based on the ranked probabilities, targeting the highest to lowest cohorts of scored prospects. These probabilities were derived from a unique combination of socioeconomic and demographic characteristics, including but not limited to:

- *Financial*: CARE or FERA, High Energy Burden, Socioeconomic Vulnerability Index (SEVI)
- *Demographic*: Renters or Homeowners, Seniors
- *Location*: Climate Zone, DAC
- *Health*: MBL, Respiratory conditions (e.g., Asthma), Disabled

This information is obtained in the Acxiom third-party vendor-provided database. Results of the monthly ESA customer acquisition campaigns serve as a foundation for the refinement of these models to further enhance their predictive capabilities and enhance efforts to prioritize non-ESA enrolled high energy users in desired segments.

The following sections describe some of the traditional and targeted marketing and outreach activities SCE conducted in 2025 to inform customers identified through the direct targeting methods described above of the ESA program:

**2025 Direct Marketing Summary**

The ESA Program's marketing efforts in 2025 effectively raised awareness and generated interest, motivating customers to complete the SCE.com ESA application for contractor follow-up. By leveraging a mix of proven channels and introducing new tactics to broaden outreach, the campaign began in August and ran through December across various platforms. The multi-channel approach produced over g22,000 leads via SCE.com and helped guide customers to convert to leads through other lead source channels, such as the call center and direct to contractor calls.

The media strategy built on last year's insights, testing new segments and channels to boost ESA awareness and generated over 68 million media impressions in 2025—a 147% increase from 2024. Paid social ads on Meta drove most of the actions on the website, accounting for nearly three-quarters of all activity, while paid search ads were the most effective at turning visits into actions.

A multi-channel approach, combining paid media, email campaigns, and direct mail significantly boosted website activity with 453k visits, an increase of 165k visits, or +57% year-over-year (YOY). Overall, the multi-channel communications strategy was successful in driving program awareness, engagement, and the submission of 22,000+ SCE.com leads.

**ESA Emails**

In 2025, The ESA Program's email communications expanded significantly to better support contractor lead generation needs, increasing from approximately 727,000 sends in 2024 to approximately 1 million emails in this highly targeted outreach. Campaigns aligned to monthly contractor needs by

using the ESA propensity model to prioritize customers most likely to enroll and layering CARE/FERA enrollment across most waves to maintain audience quality. In 2025, email campaigns drove 46,000 visits to ESA program pages, with nearly three out of four visitors actively engaging with the content. This high engagement shows the emails were reaching the right people—customers who were genuinely interested, paying attention, and ready to take the next step. As a result, email proved to be a reliable way to generate motivated leads and consistently support contractor demand throughout the year.

**Sample of E-mail Marketing Materials**

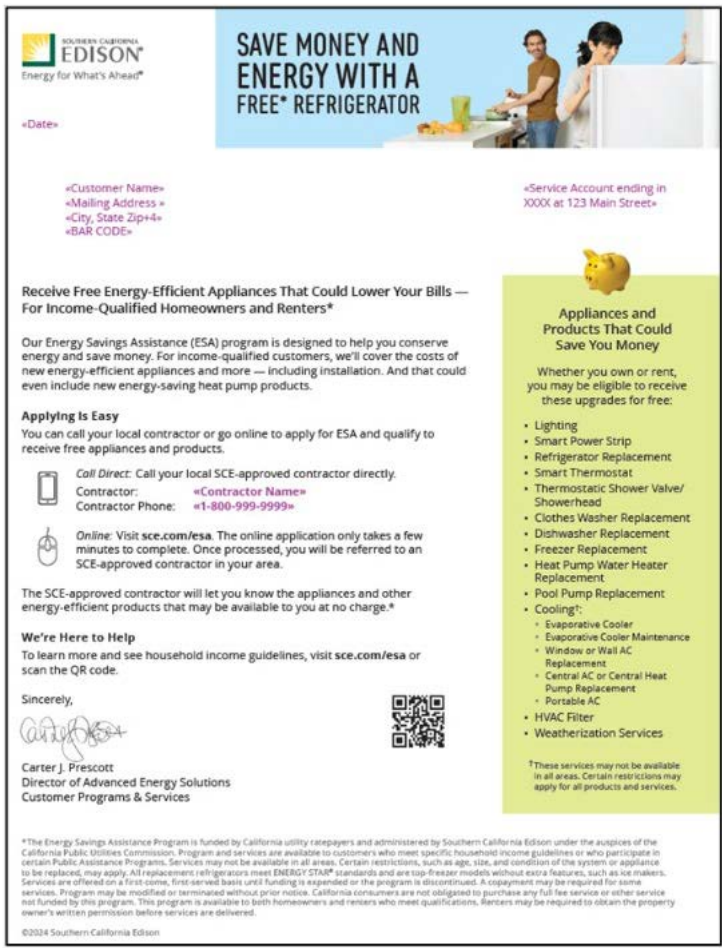
**ESA Direct Mail**

In 2025, the ESA Program's Direct Mail expanded its support for contractor lead generation needs, increasing outreach from 479K letters in 2024 to more than 650K mailings. Targeting was aligned to monthly contractor demand, prioritizing ZIP codes where additional leads were needed, and leveraging the ESA propensity model to focus on customers most likely to convert into qualified leads. This ensured contractors received higher intent prospects ready for follow-up and enrollment.

A major enhancement in 2025 was the introduction of the revised Direct Mail creative, first deployed on October 24. The refreshed design featured a more modern, clean layout and a clearer, more direct call to action. Critically, each letter included dynamic contractor information—automatically displaying the customer's dedicated contractor name and phone number based on their location—along with a more prominent QR code to streamline response and drive easier enrollment.

Together, these enhancements strengthened clarity, usability, and lead quality, helping Direct Mail remain a dependable channel for generating motivated, high propensity customers throughout the year.

## Sample of Direct Mail Marketing Materials



SOUTHERN CALIFORNIA EDISON®
Energy for What's Ahead®

«Date»

# SAVE MONEY AND ENERGY WITH A FREE* REFRIGERATOR

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

«Service Account ending in XXXX at 123 Main Street»

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

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

**Applying Is Easy**

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

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

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

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

**We're Here to Help**

To learn more and see household income guidelines, visit **sce.com/esa** or scan the QR code.

Sincerely,

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

**Appliances and Products That Could Save You Money**

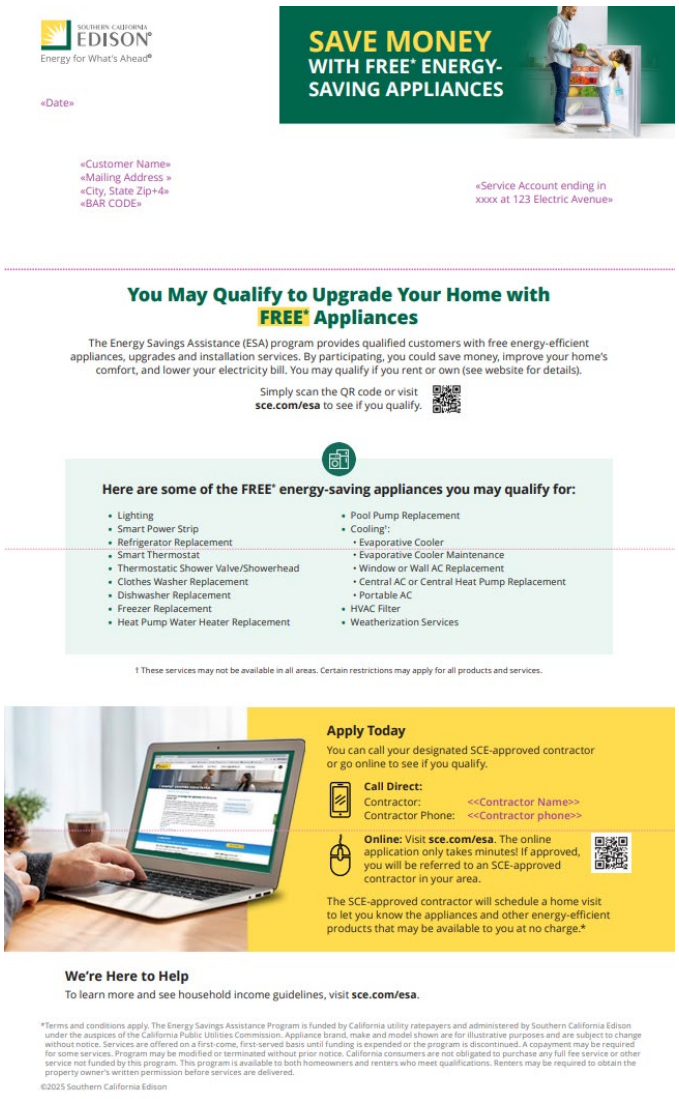
Whether you own or rent, you may be eligible to receive these upgrades for free:

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

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

*The Energy Savings Assistance Program is funded by California utility ratepayers and administered by Southern California Edison under the auspices of the California Public Utilities Commission. Program and services are available to customers who meet specific household income guidelines or who participate in certain Public Assistance Programs. Services may not be available in all areas. Certain restrictions, such as age, size, and condition of the system or appliance to be replaced, may apply. All replacement refrigerators meet ENERGY STAR® standards and are top-freezer models without extra features, such as ice makers. Services are offered on a first-come, first-served basis until funding is expended or the program is discontinued. A copayment may be required for some services. Program may be modified or terminated without prior notice. California consumers are not obligated to purchase any full fee service or other service not funded by this program. This program is available to both homeowners and renters who meet qualifications. Renters may be required to obtain the property owner's written permission before services are delivered.

**Sample of Direct Mail Marketing Material Launched October 2025**



SOUTHERN CALIFORNIA EDISON®
Energy for What's Ahead®

«Date»

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

SAVE MONEY
WITH FREE* ENERGY-SAVING APPLIANCES

«Service Account ending in xxxx at 123 Electric Avenue»

**You May Qualify to Upgrade Your Home with FREE* Appliances**

The Energy Savings Assistance (ESA) program provides qualified customers with free energy-efficient appliances, upgrades and installation services. By participating, you could save money, improve your home's comfort, and lower your electricity bill. You may qualify if you rent or own (see website for details).

Simply scan the QR code or visit **sce.com/esa** to see if you qualify.

**Here are some of the FREE* energy-saving appliances you may qualify for:**

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

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

**Apply Today**

You can call your designated SCE-approved contractor or go online to see if you qualify.

**Call Direct:**
Contractor: <<Contractor Name>>
Contractor Phone: <<Contractor phone>>

**Online:** Visit **sce.com/esa**. The online application only takes minutes! If approved, you will be referred to an SCE-approved contractor in your area.

The SCE-approved contractor will schedule a home visit to let you know the appliances and other energy-efficient products that may be available to you at no charge.*

**We're Here to Help**

To learn more and see household income guidelines, visit **sce.com/esa**.

*Terms and conditions apply. The Energy Savings Assistance Program is funded by California utility ratepayers and administered by Southern California Edison under the auspices of the California Public Utilities Commission. Appliance brand, make and model shown are for illustrative purposes and are subject to change without notice. Services are offered on a first-come, first-served basis until funding is expended or the program is discontinued. A copayment may be required for some services. Program may be modified or terminated without prior notice. California consumers are not obligated to purchase any full fee service or other service not funded by this program. This program is available to both homeowners and renters who meet qualifications. Renters may be required to obtain the property owner's written permission before services are delivered.

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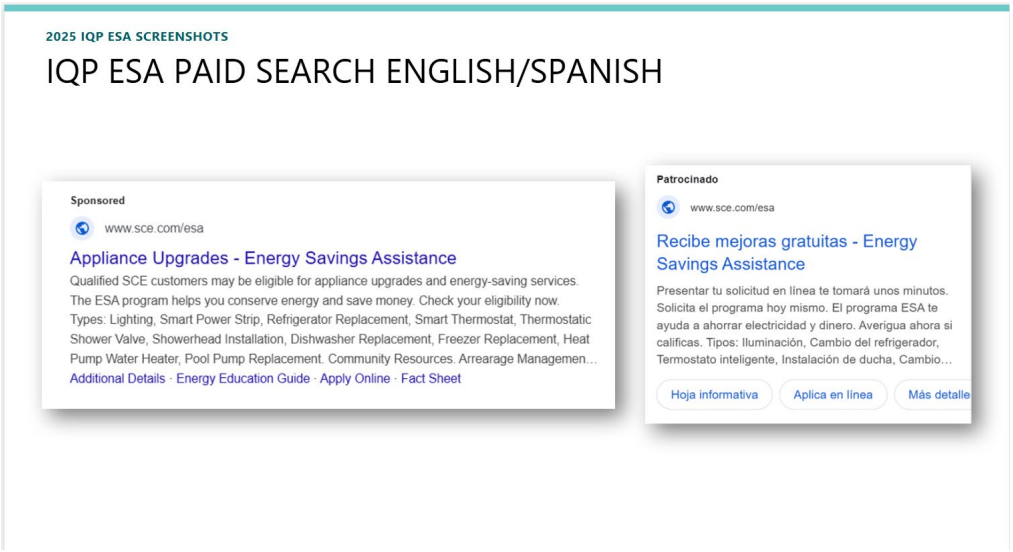
## ESA Paid Search

The ESA Program's Paid Search demonstrated strong efficiency in 2025, generating 28K landing page visits and 5K site actions with a 25% site action rate—up 4 percentage points year over year—indicating stronger program intent and higher quality traffic. Overall performance was driven by English Brand keywords, which delivered the highest volume of site actions, the best cost per action (CPA) at $6.30, and the strongest site action rate (29%)[14]. Paid Search

14 The average cost incurred to generate a completed site action.

closed the year with 5.3K total site actions at a $7.16 CPA, while maintaining a low $1.33 cost per landing page visit (CPLPV), underscoring its role as the most cost-efficient performance channel. Top-performing queries centered on key program terms such as “sce appliance replacement program” and “energy assistance program,” reinforcing high alignment between search intent and program offerings.

**Example of Paid Search Advertisements**



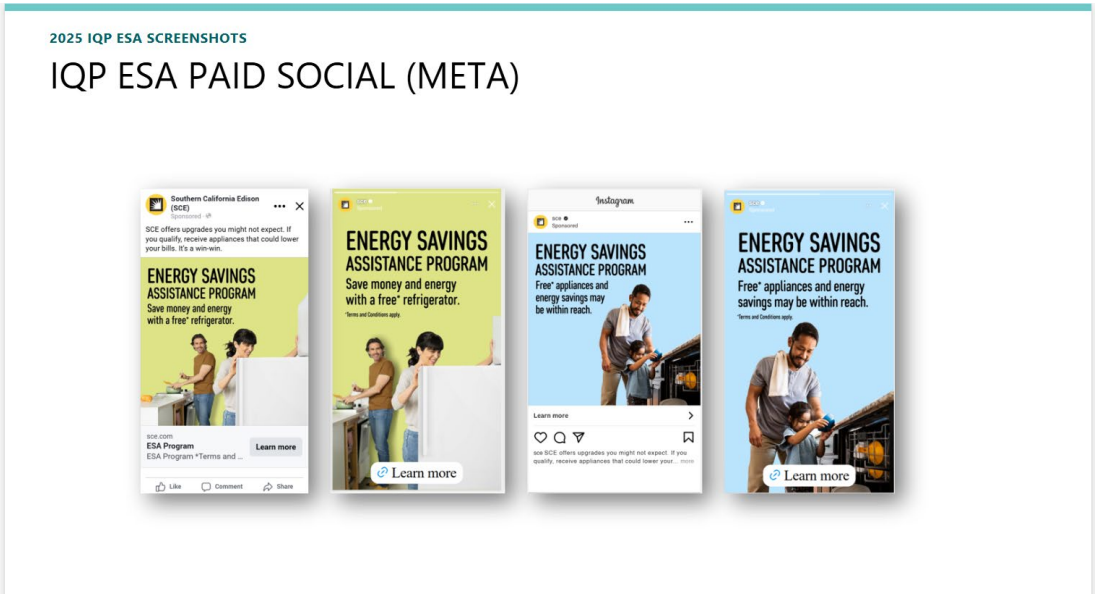

## ESA Paid Social

The ESA Program’s paid social campaign achieved over 10.4 million English impressions and more than 15.8 million Spanish impressions, totaling over 26 million impressions to generate awareness and program consideration. The campaign utilized Facebook to target specific audiences and optimize placements, resulting in 165,000 lading page visits and 26,000 site actions.

Meta (Facebook and Instagram advertisements) led all media tactics in site action volume, driving nearly 27k site actions through December. The overall Meta click-through rate (CTR) was .81% (vs. .86% in 2024), however, English CTR was observed at .94%. The top performing segments included ‘Site Action Lookalikes (introduced in 2025) and ‘CARE/FERA Enrollees + Lookalikes’ OR

'ESA Enrollee Lookalikes' led site action volume across both languages, accounting for 62% of total English actions and 83% of total Spanish site actions.

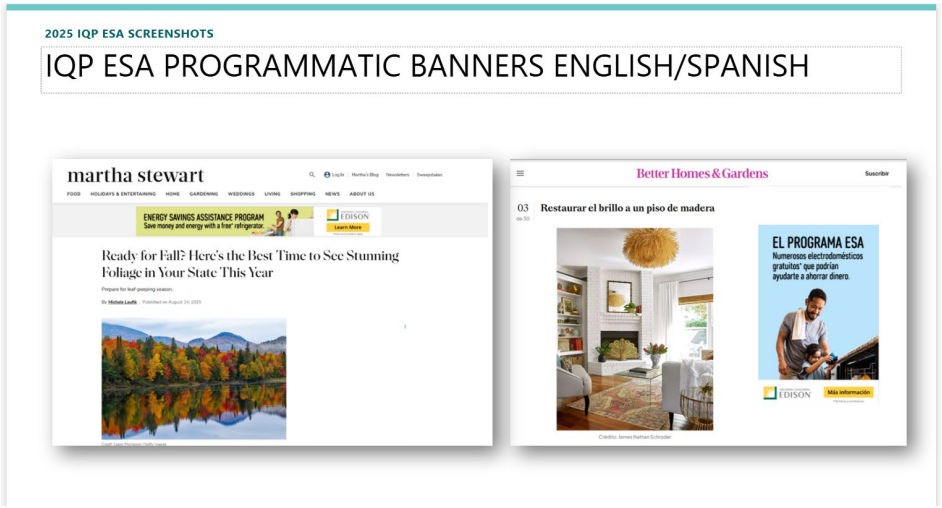
**Example of Social Media Advertisements**




## ESA Programmatic Banner Advertisements

The ESA Program's Programmatic banners delivered 7.6 million impressions with a CTR of 0.04%, driving nearly 4,000 users to the ESA landing page. By leveraging the ESA Program's machine-learning model to determine the probability a customer is a good candidate for ESA based on existing ESA enrollees, customers in-market for home renovations/searching for appliances or recently purchased a home and a household income between $25-$100k, nearly 4,000 page visits were achieved at a CPLPV of $7.93, which aligns with the results from 2024.

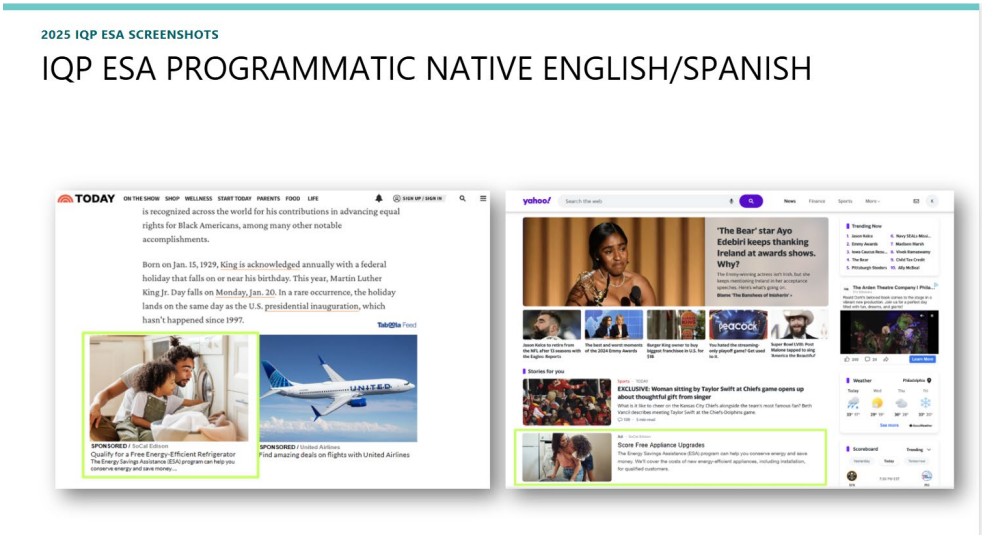
**Example of Display Banner Advertisements**




## ESA Programmatic Native Advertisements

The ESA Program's Programmatic Native Advertisements showed promise as a traffic-driving test in 2025, delivering 6.9 million impressions and 4,000+ landing page visits with a 0.06% CTR (higher than banners). Segment performance suggests In Market for Appliances and Site Retargeting were the primary drivers of visit volume (67% of LPVs combined), while the ESA Propensity Model—particularly for English-speaking audiences—was the efficiency leader, achieving the lowest CPLPV ($5.03).

**Example of Native Advertisements**



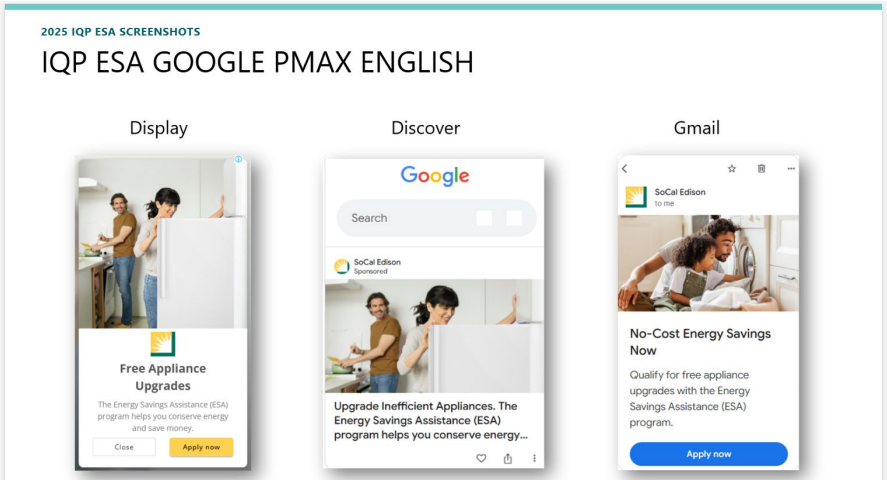
## ESA Google Performance Max(PMAX)

Launched in 2025 as a test and learn initiative, Google Performance Max is an automated Google Advertisement campaign that serves across Google properties, including Search, YouTube, Display, Discover, Gmail, and Maps. In its first year, PMAX delivered 22 million impressions, approximately 300,000 clicks, and a 1.36% CTR, establishing itself as a scalable reach driver. It also proved highly efficient at moving users to the ESA Program Page, generating nearly 215,000 visits at a $0.18 CPLPV, making it one of the most cost effective traffic sources in the media mix.

PMAX contributed meaningfully to mid funnel performance as well, achieving an $11 cost per action (CPA), the second most efficient among all channels. Its ability to optimize across formats—Search, Display, and Video—helped extend program visibility beyond traditional paid media channels while maintaining cost efficient intent actions.

Overall, PMAX's 2025 results validate its potential as a valuable new addition to the ESA media strategy, offering strong reach and efficient engagement as the program continues to refine its test and learn approach.

**Example of Google PMax**



**ESA Streaming Audio**

The ESA Program's programmatic audio delivered strong performance in 2025, reaching 2.9 million impressions while improving overall cost efficiency with a $17.15 cost per thousand (CPM) compared to $18.43 in 2024. English placements were particularly effective, achieving an 11% year over year cost improvement. Engagement remained exceptional as well, with listen through rates averaging 94% across both English and Spanish audiences—indicating that listeners consistently stayed connected with our audio content.

**ESA Landing Page**

In 2025, marketing driven activity to the ESA Program Page increased significantly, reaching 453K visits—a 57% year over year lift fueled by Paid Media, Email, and Direct Mail efforts. This growth reflects strong campaign visibility and continued interest in the ESA program across multiple customer touchpoints.

Channel contributions evolved in 2025, with Paid Media—especially Paid Social—taking on a larger role in driving traffic and Intent Actions as Email and Direct Mail volumes were optimized throughout the year. Paid Search, supported by PMAX's expanded display inventory, also played an important role in increasing overall site visitation.

Across the full marketing mix, the IQP ESA Campaign remained the primary driver of engagement on the program page. Additional contributions from the IQP FERA/CARE and IQP BSC email campaigns demonstrated the value of coordinated outreach and revealed opportunities for deeper cross promotion and guided routing for eligible customers.

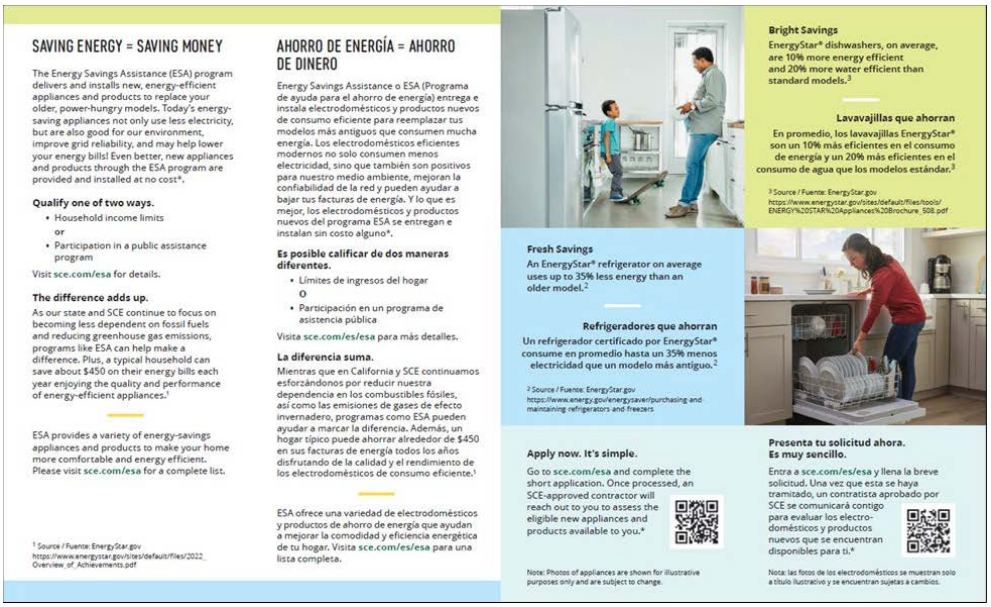
Overall, the landing page saw strong growth in 2025, supported by a diversified channel mix and increasing opportunities to connect customers with ESA program information earlier in their journey.

**Cross Program Promotional Marketing**

Throughout 2025, SCE conducted ongoing cross-program co-marketing to expand awareness of the ESA program by leveraging outreach efforts associated

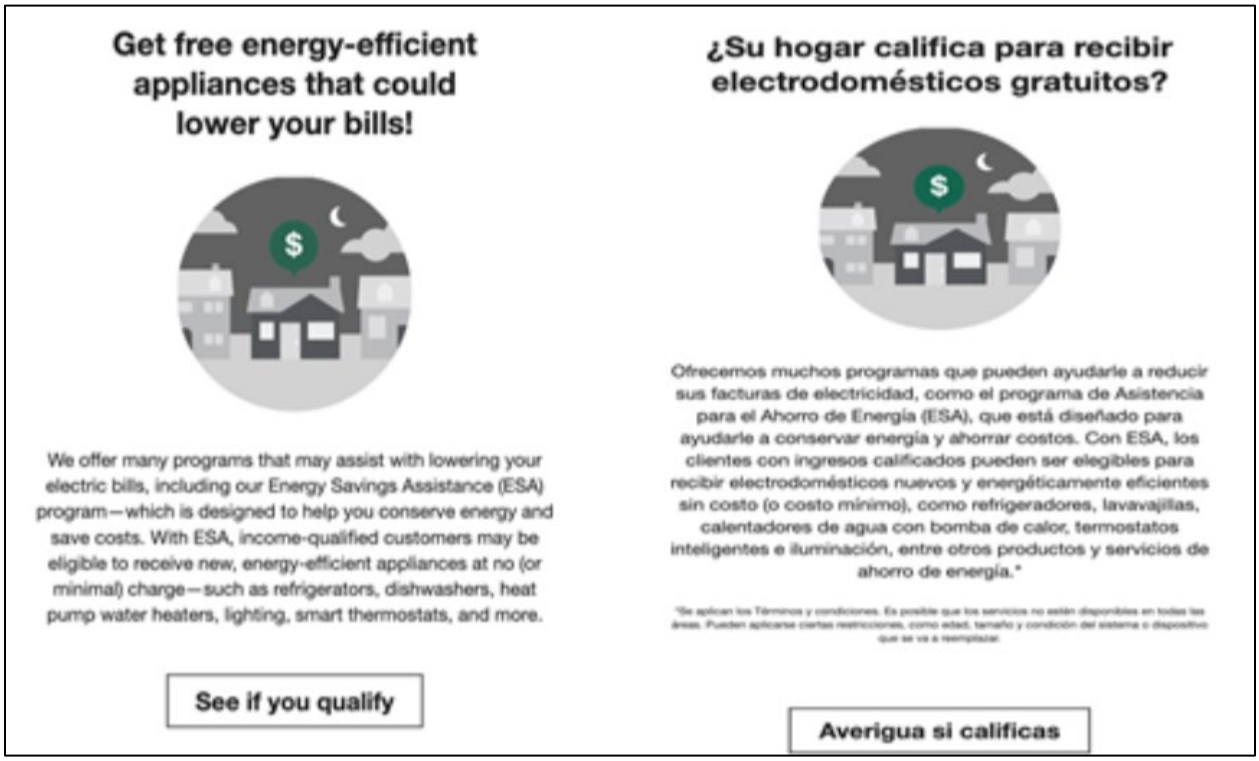
with other customer programs. As part of these efforts, ESA developed a trifold marketing brochure highlighting available ESA appliances and electrification measures, which was incorporated into direct marketing campaigns for the Medical Baseline Allowance (MBL) and Arrearage Management Plan (AMP) programs over the course of the year. This approach enabled ESA messaging to reach customers already engaged through other assistance programs, increasing exposure while minimizing duplicative outreach. In addition, ESA materials were included in MBL-based campaigns serving Low Income Home Energy Assistance Program (LIHEAP) customers, with similar MBL-leveraged co-marketing efforts planned as part of ongoing outreach activities.

**Example of ESA Brochure**




Home Energy Report (HER) – The HER is a user-friendly communication sent to SCE customers. HERs provide residential customers with personalized information to help them lower and manage their energy use in various styles. HERs also use the customer's household energy consumption data to present compelling and behavior-based intervention strategies and actionable insights designed to drive energy and demand savings. The ESA module was successfully included in the July through August deployment and sent to over 1.4 million emails to customers and generated over 3,600 clicks.

**Example of ESA messaging on the Home Energy Report**




**Inbound Calls**

Customers who call SCE's CCC are informed of and referred to the ESA program. Customers are assigned to a contractor serving their service area. ESA contractors then follow up on leads and contact customers to assess ESA program eligibility and enrollment. In 2025, SCE received over 7,800 ESA-related calls from interested customers.

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

Following significant program design and implementation changes in 2023 and continued refinement in 2024, 2025 represented the first full year in which the redesigned delivery model operated at scale. While the core components of ESA program outreach and enrollment, assessment, measure

installation, and inspections remained structurally consistent with prior years, during this period, SCE focused on optimizing execution, building on lessons learned from prior years to improve coordination, enhance customer targeting, and support increased production under a stabilized operating environment.

**Identification, Outreach and Enrollment**

In 2025, customer identification continued to prioritize income-qualified households with higher energy use and greater potential for energy savings, consistent with program design enhancements introduced in 2023. Identification strategies were further strengthened through improved data integration and analytics enabled by iEnergy, which enhanced SCE's ability to more effectively target customers experiencing high energy burden. These advances supported expanded use of data analysis and opportunity modeling to identify under-penetrated geographic areas with high ESA eligibility.

In 2025, ESA continued to mature and strengthen its engagement with Tribal communities through increased coordination, relationship management, and operational alignment. A key milestone was the full implementation of the Bridgeport agreement. While the agreement had been established previously, 2025 marked the first year in which all required coordination elements were fully in place, allowing the program to operationalize services effectively within the Tribal community. Successful Tribal engagement requires a project management–oriented approach rather than a traditional volume-based enrollment model. This included close coordination with Tribal liaisons, verification of service addresses within reservation boundaries, alignment on scheduling expectations, and confirmation that proposed measures were acceptable to the Tribe prior to installation. These efforts required ongoing coordination among multiple parties throughout outreach, enrollment, and installation phases and represented a notable evolution in how ESA delivers services in Tribal contexts.

In 2025, ESA advanced a more targeted outreach strategy by expanding and refining its outreach agency network through a competitive Request for Proposal (RFP) process that concluded in 2024. This effort resulted in the

selection of specialized outreach organizations that are particularly well suited to engage hard to reach customer populations. This approach represented a shift toward more focused, niche engagement strategies. Rather than prioritizing high lead volume like traditional outreach, the new outreach agencies emphasized reaching customers that may experience additional barriers to participation, recognizing that these engagements may yield fewer leads but stronger customer commitment and follow through. Onboarding these agencies allows ESA to evaluate whether deeper, trust-based engagement translates into higher-quality leads and improved conversion outcomes over time.

In parallel, ESA made operational adjustments to lead management practices to reduce customer attrition and ensure customers moved through the enrollment pipeline efficiently. This included selectively reassigning leads among contractors to address backlogs and maintain service continuity. These changes supported overall program stability while sustaining enrollment momentum throughout the year.

**Measure Installation**

In 2025, ESA operated under a more mature implementation of its service delivery model. While eligible measures and core installation requirements remained largely unchanged, contractors were better positioned to deliver services due to improved coordination, clearer processes, and accumulated program experience. The program also expanded training efforts related to HPWH installations. These training courses were intended to increase contractor comfort and proficiency with installations, supporting quality and consistency in service delivery.

SCE also introduced a rural incentive to address the higher costs and logistical challenges of serving remote and mountainous regions. Its inclusion reflected the program's ongoing efforts to address geographic service challenges and encourage participation in rural areas. These communities often have less access to new and energy-efficient appliances due to the higher costs and logistical difficulties associated with installations in remote and mountainous

locations. The rural incentive was designed to help mitigate these barriers by offsetting the additional challenges of serving these areas.

**Inspections**

In 2025, inspection protocols focused on improving the handover process between contractors and inspectors. Efforts centered on clearer communication and better alignment within the program system to enable smoother transitions and reduce delays. While incremental improvements were made, most major system enhancements—supporting data access and workflow optimization—are scheduled for implementation in the first half of 2026. These upcoming upgrades are expected to further streamline handoffs and strengthen coordination for both contractors and inspectors.

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

SCE has focused on strengthening partnerships with Tribal communities in 2025 through a structured outreach program aimed at educating Tribal leaders on income-qualified energy programs and promoting community engagement. This includes the Mini Grant Outreach Program, community events, safety meetings, and workforce initiatives.

Early in the year, SCE initiated outreach to identify Tribal organizations within its service area for participation in the 2025 Tribal Mini Grant Outreach Program and to expand structured engagement opportunities. SCE's Tribal outreach emphasized practical, community-facing education and resiliency support. The Mini Grant Program included the Tule River, Bridgeport, and Soboba Tribes, and the outreach strategy focused on equipping Tribal leaders with information and resources to increase awareness and drive program participation.

In the spring, SCE participated in three Tribal Earth Day events at Soboba, Morongo, Bishop Paiute, and Pechanga. In collaboration with internal partners

such as Local Public Affairs, Public Safety Power Shutoff (PSPS), and Customer Solutions, SCE shared information about EE and income qualified programs (IQP), including CARE, FERA, and ESA. SCE also addressed wildfire safety and mitigation questions raised by community members.

In June, SCE's outreach included a visit to the Bridgeport Indian Colony, where the Energy Assistance Program supported 23 residents with new energy-efficient appliances. This effort demonstrated direct customer benefits alongside broader education and outreach.

In the second half of the year, SCE expanded Tribal engagement to include workforce exposure, leadership convenings, and enhanced community education. In August, SCE sponsored the inaugural Central Valley Native Futures event with the Tule River Tribe, introducing local students to EE careers and workforce training, with a follow-up visit to the Tulare Energy Education Center (EEC) planned. That same month, SCE participated in the Tribal Leaders Energy Summit, which brought together more than 160 Tribal leaders, energy experts, and government representatives to address energy resilience, hazard communication, and emerging technologies. The summit was recognized by the U.S. Department of Energy and the California Public Utilities Commission, with the Governor's Office of Indian Affairs proposing it as an annual requirement. SCE also participated in monthly safety meetings and hosted two Citizen PowerTalk workshops in August, further strengthening community education efforts.

By the fall, Mini Grant participation expanded to include additional Tribal partners, and SCE continued integrating Tribal outreach within safety and preparedness touchpoints. In October, the Tule River, Bridgeport, Soboba, and Chemehuevi Tribes were participating in the Mini Grant Program. SCE's outreach also included monthly safety meetings and participation in the Pechanga Fire Prevention Open House community event. These efforts reinforced public safety coordination while continuing education on IQP offerings and available resources.

Across 2025, SCE emphasized pairing relationship building with measurable engagement. SCE conducted activities throughout the year and documented a total of 36 Tribal-focused events. This cadence supported ongoing communication, strengthened collaborative relationships, and sustained awareness of IQP and resiliency resources.

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

Customers with a functional central HVAC system and Wi-Fi may be eligible for a SCT from ESA. A SCT with wi-fi connectivity enables customers to participate in Demand Response (DR) programs, which offer the dual benefits of lowering customer bills and reducing peak load on the electric grid. The total number of SCTs installed and their energy savings are detailed in Table 2ESA Main Program Total – 2025 Completed & Expensed Installation in the Appendix.

In accordance with D.17-12-009,[15] PG&E, SCE, and SDG&E were directed to select a load disaggregation vendor to create individual CARE program customer reports that illustrate disaggregated household usage by end use, over time. These reports were to be accessible to ESA program contractors and customers that supplemented customer self-service functionalities that are available on the respective utilities customer portal commonly referred to as My Energy or My Account.

SCE launched the first phase of the Load Disaggregation Report on October 17, 2024, delivering emailed reports to CARE and FERA customers. The second phase was launched on February 19, 2025, expanding access to the

[15] D. 17-12-009, OPs 94, 96, 97.

Disaggregation Report through My Account for customers and iEnergy for contractors.

During 2025, outreach emails were successfully delivered to 4,751,627 customers, with 1,400,272 emails opened, resulting in an overall 29.47% open rate.

Also, part of the second phase, CARE and FERA program welcome letters were updated to inform newly enrolled customers that they can download their Load Disaggregation Reports through My Account. These reports are available in five languages: English, Spanish, Chinese (Mandarin), Korean, and Vietnamese.

Additionally, information about SCE's DR programs was incorporated into the in-home energy education provided to customers. This was completed during both the enrollment and assessment phases, as well as the installation phase, when applicable. Costs for the leave-behind materials (flyers, enrollment pamphlets, etc.) were covered by the respective DR program.

### 1.2.7 Managing Energy Use

SCE contractors consistently review the ESA program's Customer Energy Education and Resource Guide with each participating customer, either through in-person interactions or virtual engagements. The guide is available in both printed and digital formats across seven languages and may also be provided in Braille upon request. Its primary purpose is to provide low-income customers with practical information to support energy conservation and help reduce utility costs. The guide also outlines the steps for enrolling in SCE My Account, the online self-service portal available on SCE.com. Through this platform, customers can access additional tools and resources designed to save time, energy, and money, as well as participate in residential EE rebate and demand response programs.

### 1.2.8 Services to Reduce Energy Bills

ESA contractors are mandated to provide at least 20 minutes of in-home energy education during their Enrollment and Assessment visit with customers.

This education includes energy-saving techniques and specific cost-saving strategies tailored to each customer's home.

Additionally, contractors offer information on SCE's Arrearage Management Plan (AMP) program, MBL, and other assistance programs designed to help customers reduce their energy costs.

ESA contractors also encourage customers to visit https://www.sce.com/residential/assistance to explore all of SCE's financial assistance programs. ESA contractors serve as a valuable communication channel, informing customers about the benefits and resources available through SCE, state agencies, and local programs.

## 1.3 Energy Savings Assistance Program Customer Enrollment

### 1.3.1 Report the number of customers or households treated, the IOU specific 2025 household treatment target, and the percentage of households treated. If the IOU was not able to reach the total household target, please explain.

In PY 2025, the ESA program met and exceeded its homes treated target at the portfolio level. SCE treated a total of 65,442 homes, representing 110 percent of the households treated goal of 59,512. This performance reflects contributions across the ESA Main program, the MFWB In Unit program, and the ESA BE pilot, representing a broader accounting of program impacts than in prior years. The strong homes treated performance in 2025 demonstrates meaningful progress in program scale, delivery efficiency, and customer reach. The increased number of households served reflects improvements in outreach, enrollment throughput, system performance, and contractor execution compared to earlier years.

By 2025, the combined effects of contractor stabilization, improved system performance, clearer workflows, and targeted program delivery refinements enabled the ESA program to transition from stabilization to scaled execution and optimization. Key contributors to improved performance in 2025 included:

- Increased lead generation and conversion driven by expanded, data-driven outreach efforts
- More predictable enrollment and assessment workflows supported by improved iEnergy stability
- Stronger contractor execution as field experience increased and training expanded
- Continued use of advance payments and milestone-based invoicing to support contractor cash flow
- Inclusion of multifamily and pilot program activity in portfolio-level reporting

As a result, SCE significantly increased the number of households served in 2025 and exceeded the portfolio homes treated target, reflecting meaningful progress toward program maturity and sustained delivery capacity.

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

In 2025, the ESA program implemented improvements to the enrollment process through coordination with SoCalGas on income-verification practices supported by PRIZM data. While this effort began in 2024, 2025 marked the first year these enhancements were fully incorporated into ESA enrollment activities. The updates were designed to better align enrollment approaches across utility programs and simplify the income-verification experience for customers. These changes helped reduce the need for duplicative documentation while continuing to apply the program's existing income eligibility requirements. Prior to implementation, contractors received guidance and training to support appropriate use of the new approach, ensuring a measured and consistent rollout that maintained program integrity.

In 2025, SCE continued the long-standing practice to utilize categorical eligibility and self-certification to streamline enrollment efforts for the ESA Program. Categorical eligibility based on qualifying programs is used to simplify

the enrollment income verification and data collection process for customer enrollment.

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

In 2025, SCE achieved 26,892,090 kWh of energy savings, representing 80 percent of the portfolio energy savings goal. While the ESA program did not fully meet its energy savings targets at the portfolio level, this performance reflects contributions across the ESA Main program, the MFWB In-Unit and Common Area/Whole Building components, and the ESA BE pilot, representing a broader accounting of program impacts than in prior years.

Despite not fully achieving the authorized savings targets, 2025 represented a significant improvement over 2024, when the program achieved approximately 58 percent of the energy savings goal. The more than 20-percentage-point improvement year over year reflects continued recovery from earlier operational challenges and progress in installation throughput, contractor execution, and savings realization.

There were several interrelated factors that may have contributed to the program not fully achieving its energy savings goals in 2025.

- Inventory-related delays continued to affect the timing and sequencing of measure installations, particularly for high-savings measures such as HPWHs, HVAC equipment, and certain refrigeration products. Extended lead times for key equipment may have limited contractors' ability to complete full measure packages within the PY.
- The continued maturation of the deeper savings program design introduced in 2023 may have affected savings realization. While prioritizing higher-energy-use customers has

increased long-term savings potential, deeper savings measures often require more complex installations, longer scheduling windows, and greater coordination with inventory and permitting processes. These operational realities could have constrained the pace at which higher-savings measures could be fully deployed within the PY.

- System and process transitions continued to influence savings realization. Although iEnergy system performance improved substantially in 2025 compared to 2024, ongoing refinements to workflows, documentation requirements, may have affected the timing of when savings could be fully claimed and reported.

At the same time, ESA observed meaningful progress in claimable energy savings in 2025. The program applied refined claimable kWh calculations during the year and recorded an increase in claimable savings compared to the prior year. These refinements improved alignment between installed measures and reported savings and helped address methodological limitations identified during earlier program years. Claimable savings did not fully offset inventory- and timing-related constraints in 2025 but represent positive progress in savings realization and provide a stronger foundation for achieving energy savings targets as installation activity continues to scale.

Looking ahead, SCE is planning several targeted refinements in 2026 to further increase energy savings outcomes and better align program delivery with savings goals.

- Improved inventory forecasting and coordination, including earlier ordering and enhanced visibility into vendor supply timelines, to reduce installation delays for high-savings measures.

- Greater emphasis on full measure installation packages, supported by contractor guidance and system prompts to ensure all feasible measures are installed where appropriate.
- Continued optimization of measure mix, prioritizing technologies with higher verified savings while maintaining program accessibility for income-qualified customers.
- Ongoing enhancements to iEnergy workflows and savings attribution, supporting more timely and accurate reporting of installed and claimable savings.
- Expanded contractor training and technical assistance, particularly for complex measures such as HPWHs and HVAC systems, to reduce rework, inspection failures, and deferred installations.

Together, these actions are expected to strengthen the program's ability to convert increased enrollment and homes treated into higher realized energy savings in future program years.

| ESA Table **1.1.1.8** Claimable kWh for ESA Main | | |
|---|---|---|
| **Total Savings Methodology** | **kWh (Annual)** | **% of 2025 Authorized Forecasted Planning Assumptions** |
| As Reported | 20,697,740 | 62% |
| As Reported with Heat Pump Negative Savings[16] Removed | 22,886,483 | 68% |
| As Reported with Heat Pump Negative Savings[18] Removed and Replaced with Claimable kWh | 28,502,938 | 85% |

The ESA Table **1.1.1.8** Claimable kWh presents a comparison of total savings in kWh determined by the methodology of savings calculations. The

16 Negative kWh savings for Heat Pump Water Heater and Heat Pump HVAC measures.

reported savings are 20,697,740 kWh, which accounts for 62% of the forecast. When heat pump negative savings are removed, the savings increase to 22,886,483 kWh, representing 68% of the forecast. Furthermore, when these negative savings are replaced with claimable kWh, the total savings rise to 28,502,938 kWh, achieving 85% of the forecast. This table underscores the impact of how savings calculations methodologies affect kWh savings.

## 1.4 Disability Enrollment Efforts

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

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

Targeted customer outreach efforts encouraged households to schedule assessments with ESA service providers to review their homes and determine program measure eligibility. SCE does not inquire if a customer, or someone in their household, has a disability. A customer may self-identify that they, or someone in their household, is disabled. Alternatively, during in-home assessments, the service provider representative may learn that someone is living in the home that is disabled.

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

SCE's Marketing, Education, and Outreach (ME&O) efforts continued to emphasize accessible and inclusive outreach approaches by collaborating with organizations that serve customers with a range of health, accessibility, and functional needs. While SCE does not collect or track disability status, it leverages certain program participation indicators available in its systems—such

as enrollment in the MBL Program—to help inform outreach planning and service delivery. Participation in MBL may indicate households with medical or energy-dependence considerations that warrant additional attention to accessibility, communication, and accommodation needs. These indicators are used solely to support effective, inclusive outreach and to ensure ESA services are delivered in a manner that is responsive to customer needs.

As stated in ***Section 1.2.3***, MBL criteria is included in direct targeting predictive statistical models used to prioritize those households most likely to be approved for ESA enrollment. SCE cross promoted ESA with programs such as MBL to reach this customer segment. In training workshops delivered to ESA service providers, SCE includes guidelines on proper etiquette to observe when working with customers with disabilities. Through this approach service providers can customize service delivery for households based on their specialized needs.

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

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

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

Most ESA enrollments come from various sources such as SCE Referrals, Joint Utility, or Outreach efforts, which consist of a sub-set of customers who voluntarily self-identify themselves and/or a household member as disabled, or who were enrolled in MBL or CARE programs. SCE Referrals are from various SCE sources such as marketing campaigns, calls to the CCC, and sign-ups from SCE.com. Joint Utility enrollments are from SCE and other utilities such as SoCalGas or SouthWest Gas. Outreach enrollments result from contractor outreach, canvassing and door knocking activities. Enrollment numbers are likely underreported as SCE must rely on customers with disabilities to voluntarily self-identify. (See 2025 Disability Enrollments table below for information on enrollment numbers of customers with disabilities.)

| **2026 Disability Enrollments (Self-reported)** | | | |
|---|---|---|---|
| **Source** | **Total Enrollments** | **Disability Enrollments** | **% of Disability Enrollments** |
| **SCE Referral** | 17,199 | 3,880 | **23%** |
| **Joint Utility** | 36,847 | 3,665 | **10%** |
| **Outreach** | 91 | 25 | **27%** |
| **Total**[17] | **54,137** | **7,570** | **14%** |
| ***Target Enrollment Rate*** | | | ***15%*** |

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

SCE is not permitted by law to ask customers or household members if they have disabilities and therefore must rely on customers to voluntarily self-identify their disability for tracking purposes. The numbers represented above relate specifically to those customers who have self-identified and are likely not

[17] Excludes Disabled enrollments with missing categories, or which declined to provide.

representative of the total customers served by SCE's ESA program in this segment. In 2025, 14% of ESA participants self-identified as belonging to the disabled community, with SCE Referral at 23%, Joint Utility at 10%, and Outreach at 27%.

In 2025, ESA achieved disability enrollment levels of 14 percent, just one percentage point below the program target and a substantial improvement compared to prior years. This represents a notable increase from 2024, when disability-related enrollments accounted for approximately 9 percent of total ESA participants.

While no single causal factor was identified, the YOY increase reflects a meaningful shift relative to historical performance. Potential contributing factors for the improvement in disability related enrollments include the use of varied, data driven marketing approaches, PRIZM aligned enrollment practices, and increased comarketing efforts with partner organizations such as the AMP and the MBL program. Although these efforts were not designed to target disability status directly, they may have supported broader reach into customer populations with accessibility or health related needs. A definitive attribution, however, is not possible.

## 1.5 Leveraging Success, Including Low-Income Home Energy Assistance Program (LIHEAP)

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

In 2025, SCE shared ESA program customer leads and enrollments with the following programs: Disadvantaged Community – Single-family Solar Homes (DAC-SASH) and SOMAH. The DAC-SASH program aids with upfront financial incentives towards the installation of solar generating systems on homes of low-income homeowners who are resident homeowners of single-family homes in DAC areas. SCE receives a list of new DAC-SASH participants monthly from the

DAC-SASH program administrator. SCE provides these leads to ESA program contractors for future potential enrollments.

In October 2025, ESA coordinated with GRID Alternatives' (administrator of the DAC-SASH program) by distributing DAC-SASH informational brochures through ESA contractors as part of routine Energy Education activities. A digital version of the brochure was also made available alongside ESA Energy Education materials to support consistent messaging across in-person and digital outreach channels. These materials informed eligible ESA customers about opportunities to receive no-cost rooftop solar systems through DAC-SASH and encouraged participation in complementary programs that further reduce long-term energy costs. This collaboration reflects ESA's strategy to maximize customer impact through coordinated outreach and cross-program leveraging, rather than standalone service delivery.

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

SCE also continues to share customer enrollment data with other utilities such as SoCalGas, PG&E, and Southwest Gas to identify eligible households in overlapping service areas. In 2025 SCE provided Southwest Gas with over 1,700 leads and received about 1,300 leads from Southwest Gas. SCE works with several contractors that also have contracts with the SoCalGas ESA program. This customer sharing has multiple benefits, including avoiding duplication of efforts by reducing the number of contractor visits to a customer's home, and helping to avoid additional expenses. SCE received over 500 Joint Utility leads through this effort.

Additionally, SCE leverages the Comprehensive Manufactured Home Program (CMHP) contractor to identify and enroll eligible MH into the ESA program. The CMHP offers a specific set of HVAC EE services for dwellings and common areas of manufactured housing in SCE's service area. These services are

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

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

Many of the benefits of leveraging with other external programs are not always quantifiable. Working with external programs has likely resulted in increased awareness of ESA, which may lead to new enrollments. Perhaps more importantly, leveraging ESA in combination with multiple external programs is also likely to enhance the credibility of marketing for all the programs involved, thereby helping overcome the public perception that receiving free measures from ESA (or any other source) is "too good to be true". For example, leveraging with the CMHP program likely increases ESA program awareness amongst MH households in general by word of mouth, with enrollees telling their neighbors and friends about the benefits of the program.

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

Although no shared projects were completed in 2025, SCE will continue to leverage any opportunities with customers served by the California Department of Community Services & Development's (CSD) Low-Income Weatherization Program (LIWP). This is a state program that provides low-income households with no cost solar systems and EE upgrades.

Since CSD eligibility requirements for measure replacements are more flexible than the ESA program's requirements, identifying feasible projects has been limited. For instance, the ESA program replaces refrigerators that are 15

years or older. However, CSD's LIWP can replace refrigerators that are newer than 15 years old.

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

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

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

- California Water Association
- Liberty Utilities
- California Water Service
- Golden State Water
- Great Oaks Water
- San Gabriel Valley Water
- San Jose Water
- Suburban Water

## 1.6 Integration Success

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

Contractors providing ESA program enrollment services assist customers by informing them about the CARE discount programs and inquire about potential interest in program participation. The customer's request to participate is noted on the ESA enrollment, and the information is sent to the CARE team at SCE for enrollment in the appropriate rate discount. A file extract is received from the ESA Program on a monthly basis. This information is cross-checked

against the active CARE enrollment lists to verify that the customer is not already enrolled. Once confirmed through robotic processes, the customer is automatically enrolled in the appropriate discount rate program using the income information provided in the ESA Program data extract.

The ESA and CARE programs continue to coordinate their respective marketing plans to create cross-enrollment opportunities where feasible.

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

There were no new efforts to integrate and coordinate SCE's ESA program with the EE Residential Program, as SCE focused on improving and sustaining the momentum under the new ESA program design.

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

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

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

The ESA Program coordinates efforts with activities in the EE Programs in the following ways: SCE's HER is a personalized report that provides insights into a household's energy usage. It helps customers understand how much energy

they are consuming, compares usage with similar homes, and offers tips on how to save energy and reduce the electricity bill. The ESA program takes advantage of coordination opportunities within SCE's EE Programs, such as co-marketing ESA on SCE's HERs that are sent to a broad base of SCE customers. ESA messaging was included in approximately 1.4 million HERs sent to customers in July and August of 2025. The ESA module was included in both print and emails versions of the HER. Workforce, Education and Training (WE&T) is funded through the EE Proceeding. SCE encourages the ESA contractors to attend the EEC Training Courses; these are all funded through the EE program WE&T budget. Each month, SCE provides ESA contractors with the schedule for EEC courses in both Irwindale and Tulare via email. These communications serve as a reminder and invitation for them to participate in the various educational programs. Some examples of the courses offered include: Benefits and Installation of HPWH:

- Hot Water Design for HPWH
- Residential Electrification – 5Ws and 1H (Webinar)
- Practical Guide to All-Electric Residential Buildings (Webinar)
- BE Community-Based Organization (CBO) Training (Presented by Technology and Equipment for Clean Heating (TECH) Clean CA and SCE)
- Title 24: What's New in the Residential 2025 Energy Code (Webinar)

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

As part of its integration efforts, when appropriate, the ESA program provides information related to DR programs such as the Smart Energy Program (SEP) and Summer Discount Plan (SDP) during the installation of HVAC replacements. Specifically, customers deemed eligible for HVAC replacement are provided with information brochures for participation in both SEP and SDP;

installation crew members briefly explain the benefits of the programs to the customer. Additionally, ESA shares HVAC and Smart Thermostat installation data monthly with the DR teams. There were 70 ESA customers that participated in SDP and 129 customers that participated in SEP, for a total of 199 customers participating in DR programs.

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

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

Refer to ***Section 1.6.7***, below.

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

The California Solar Initiative provides incentives for solar technologies in SCE's service area. GRID Alternatives implements California's SOMAH program and acts as the administrator of the DAC-SASH program. SCE continues to partner with GRID Alternatives for the DAC-SASH program and Center for Sustainable Energy for the SOMAH program. SCE continued to provide GRID Alternatives with monthly lists of owner-occupied, single-family households that meet ESA program requirements of the CARE program high-usage process. The referral list contains, at a minimum, the customer-of-record's name, address, phone number, preferred language, household income, and size. In 2025, SCE provided GRID Alternatives with 19 referrals. SCE receives referrals from GRID Alternatives and in 2025 received 373 referrals.

In 2025, SCE provided 675 MFWB program referrals to the SOMAH administrator. During the same period, SCE received 36 referrals from the SOMAH administrator, which were subsequently provided to the MFWB implementer for consideration and potential program participation.

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

For annual report results, *see* ESA Table 13B (Clean Energy Referral, Leveraging, and Coordination) in the Appendix.

## 1.7 Workforce Education & Training

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

In 2025, SCE extended a contract with Proteus, Inc. to support the implementation of the Sustainable Energy Efficiency Development (SEED) program. This initiative is designed to equip individuals from low-income and disadvantaged communities with essential soft and technical skills. The program aligns with the WE&T objectives established in D.21-05-015. Additional details are provided in ***Section 1.7.3***.

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

SCE communicated extensively via email to all ESA contractors and vendors to keep them informed about the educational offerings at the EECs in Tulare and Irwindale, California. These communications served as reminders and invitations for all contractors and vendors to participate in the various educational programs offered throughout the year.

In July 2025, the SCE EEC launched the Contractor Demand Building Program to conduct HPWH training across various locations in Southern California. The program offered 42 training courses, providing participants with high-level knowledge and understanding of BE and decarbonization. These trainings equipped contractors with basic knowledge of HPWH technology and its components, proper installation techniques, leveraging rebates and incentives for

customer benefit, information about DR opportunities, and troubleshooting to ensure efficient HPWH operation.

In August 2025, in partnership with Ventura TV and RHEEM manufacture, a third-party vendor, SCE hosted a training session on HPWH and HP-AC at the EEC in Irwindale, California. This training focused on ensuring contractors were well-versed in correct installation procedures for HPWH technology, proper programming of the HPWH and effectively marketing this technology to customers.

In September 2025, SCE in collaboration with Energy Efficiency Resources, Inc. (EER) and Allied Manufacturing, hosted an in-person training at the EEC in Irwindale, California. The session covered Central HVAC and Pool Pump technologies and emphasized proper installation practices, accurate equipment programming, and effective customer engagement strategies. This training was designed to reinforce contractor proficiency and support consistent, high-quality implementation of energy-efficient measure(s).

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

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

  In 2025, the ESA Program supported workforce development objectives by leveraging existing EE WE&T activities, including training delivered through SCE's EECs and the Career Workforce Readiness program, to help create career pathways for disadvantaged workers. In addition, the ESA Program supported workforce development through the SEED program.

  The purpose of SCE's partnership with Proteus, Inc. is to continue supporting the implementation of the SEED program, which aims to equip

individuals in low-income areas and DACs with soft and technical skills. This program aligns with the WE&T objectives outlined in D.21-05-015. The program has several key objectives such as the following:

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 through the career ladder.
3. *Monitoring and Metrics*: The program will establish metrics to monitor effectiveness in achieving goals.

The SEED program consists of an eight-week cohort class, with the first four weeks dedicated to classroom learning and the remaining four weeks to hands-on training. The curriculum includes 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, HVAC installations and more.

In 2025, the SEED program offered five cohort classes, graduating a total of 85 participants. Of these graduates, 24 secured employment, and 11 were offered job positions but declined.

Students will focus on classroom learning, covering both theory and concepts. In addition, students will focus in completing the 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.

Support for SEED represents .6% of the ESA Main Program's total budget.

- **Number of Career & Workforce Readiness (CWR) participants who have been employed for 12 months after**

**receiving the training. (Provide contractors early warning of need for this information)**

Career & Workforce Readiness (CWRs) are administered as a statewide program in which PG&E serves as the IOU lead contract administrator. Metrics are tracked for the IOUs at the statewide level.

In 2025, 1,045 participants enrolled in training through the CWR program with 701 participants who completed training were placed in jobs using EE skills and 475 were employed for 12 months after receiving the training. Many students are still actively involved in training and have not yet been placed in jobs.

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

The percentage of total WE&T program participants that meet the definition of disadvantaged workers is 77%. For additional information, please reference the table Energy Education Annual Report Pg.48 under the Workforce Education and Training Program

## 1.8 Studies

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

**Energy Savings Assistance Program Non-Energy Impacts Study**

The statewide Non-Energy Impacts (NEI) Study was proposed to address the need for updated California-specific data on non-energy program impacts associated with Health, Comfort, and Safety (HCS). SCE served as the contract manager for this study and Evergreen Economics was selected as the third-party

consulting firm after the completion of a competitive solicitation process. The focus of activities associated with the ESA NEI study in 2025 was the completion of a survey to gather data from ESA participants and a similar group of non-participants, and analysis to develop updated ESA NEI for comfort, noise, and indoor air quality, which were subsequently incorporated into SCE's ESA Program Cost Effectiveness Test (ESACET).[18]

The customer survey was developed and fielded in March 2025. Using a conjoint methodology, the evaluator developed average IOU first year non-energy impact values for comfort, noise, and indoor air quality equal to $9, $1, and $1, respectively. Upon completion of the analysis, Evergreen Economics delivered a draft report, prepared and delivered a public webinar about the results and submitted a final report on June 2025.

The comfort, noise, and noise reduction non-energy benefit values were then incorporated into the latest version of the IOUs' non-energy benefits (NEB) tool within ESACET and was used in the PY 2028-2033 IQP Application and will be applied for all subsequent ESACET applications until such time that improved NEI are developed and added. Note that comfort and noise NEI valuation is dependent on the specific measure mixes installed each year and may vary across program years and IOUs. A memorandum was sent to the low-income service list, which provided a comparison of the NEI valuation before and after incorporating updating comfort and noise benefits from the study.[19] Using PY 2023 program data as a reference (to produce a parallel comparison that aligns with the study period), the overall NEB valuation reduced by 16% on average for all IOUs. For SCE specifically, the NEB valuation was reduced by 26%.[20]

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18 Concerns about collecting health related data led to an adjustment of study scope to instead focus on quantifying comfort (e.g., reduced draftiness, and increased comfort in winter and summer) and noise benefits (e.g., noise reduction in homes from both indoor and outdoor sources) of ESA participants. A non-energy benefits study proposed in the SCE's PY 2028-2033 Income Qualified Programs Application will be used to explore and quantify health and safety benefits.

19 2026-02 - ESA Non-Energy Benefits - Tool Update Memo" sent to the Low-Income Service List A. 19-11-003 on February 3, 2026.

20 *Id.*

**The following key activities took place during 2025:**

- From January to March 2025, the Evergreen Economics consulting team completed implementation of a web survey with a total of 1,303 completes (865 ESA participants and 438 comparison group respondents).
- In April, the consultant completed analysis of the data collected through the survey and delivered a draft report to the study team for review and comment.
- A public workshop to present study findings was held on May 28, 2025 with a comment period running through June 4th.
- The study was finalized on June 17, 2025, and posted on the CPUC's Public Documents Area.[21]
- From July through September, SCE developed its IOU-specific values for comfort, noise reduction, and indoor air quality improvements that were used to update ESACET.
- SCE closed out the contract with Evergreen Economics through the end of 2025.

***2025 CARE/ESA Low Income Needs Assessment (LINA)***

The Low Income Needs Assessment (LINA) is a mandated study required to be completed every three years by Assembly Bill (AB) 327 and Public Utilities Code (PUC) §382(d). Each LINA is expected to examine the energy-related needs of income qualified customers residing in one or more of the four IOUs' service territories in California.

The primary goal of the 2025 LINA Study was to gain a deeper understanding of the needs of customers with particularly high or low energy usage and develop recommendations on how the IQP can best serve these customers. SoCalGas managed the contract for this study on behalf of the ED and the IOUs, and Evergreen Economics was selected as the evaluation consultant. The study's draft research plan was presented to the Low-Income Oversight

[21] Evergreen Economics, ESA Non-Energy Impact Study, *available at* https://pda.energydataweb.com/api/view/4163/2025ES~1.PDF.

Board (LIOB) in April 2024 so that members could provide their feedback for incorporation into the finalized research plan.

High- and low-usage income qualified households were defined as the 90$^{th}$ and 10$^{th}$ percentiles of annual electricity and gas consumption by climate zone group. This approach allows for differentiation in climate across IOU service territories. Using secondary data sources, Evergreen Economics conducted a market characterization to profile high- and low-energy usage customers. The consultant also implemented a multi-mode survey, which was conducted with 1,103 active CARE and FERA program participants, stratified by climate groups and usage levels. The survey gathered information on demographics, home characteristics, energy behaviors, and behaviors that drove high- and low-energy usage. This information was complemented by data gathered from seven in-person focus groups conducted in multiple languages, including Spanish, Cantonese, and Vietnamese.

Based on these research activities, Evergreen Economics provided a list of recommendations. Some of the recommendations reflect current activities SCE is employing to serve its customers through ESA and CARE. The study suggested primary cooling system replacements for high-energy using households in high cooling areas with older cooling systems. It also recommended replacement of older dishwashers and clothes dryers for high-energy using households with older equipment. Benefits of smart strips and second refrigerator replacements for high-energy using customers were also noted. The following activities occurred throughout 2025 in support of this study.

Based on these research activities, Evergreen Economics provided a list of recommendations. Some of the recommendations reflect current activities SCE is employing to serve its customers through ESA and CARE. The study suggested primary cooling system replacements for high-energy using households in high cooling areas with older cooling systems. It also recommended replacement of older dishwashers and clothes dryers for high-energy using households with older equipment. Benefits of smart strips and second Survey implementation was completed in March 2025. Focus groups conducted in English, Spanish,

Cantonese, and Vietnamese took place in Summer 2025. Evergreen Economics delivered a draft report to ED and the IOUs in August and study results were presented to the LIOB in September 2025.The study report was finalized on October 30, 2025 and posted to the CPUC Public Documents Area website.[22]

**ESA Main Impact and Process Evaluation**

In accordance with D.21-06-015, the California IOUs are in the process of planning an impact and process evaluation of the ESA Main program covering the implementation activities carried out in 2024, with the potential to add activities in 2025 should the IOUs finalize tracking and billing data for this year in time to include in the evaluation. The ESA Main program served qualified households in single-family residences and MH regardless of whether they were renters or homeowners. This evaluation is expected to serve as the primary method to estimate weather-normalized program impacts and to inform future program delivery strategies.

The ESA Main Impact and Process Evaluation held its kickoff meeting and began scope planning in June 2025. The study team, which includes representatives from each of the IOUs and selected ED team members, conducted weekly meetings through the remainder of Q2 and Q3 of 2025 to discuss study scope and development of an RFP package. The lead IOU, SoCalGas, issued an RFP in October 2025, and solicitation activities progressed through the remainder of the year. In Q1 of 2026, the study team will review proposals and select a third-party evaluator to conduct the study through this competitive solicitation process. The study is expected to be completed by Q4 2027.

[22] https://pda.energydataweb.com/api/view/4241/2025%20LINA%20Final%20Report_103025.pdf.

**1.8.2 For studies that concluded in 2025, submit a Final Study Report describing: (1) overview of study; (2) budget spent vs. authorized budget; (3) final results of study; and (4) recommendations.**

No studies were completed in 2025.

## 1.9 Pilots

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

**ESA Whole Home Pilot Evaluation**

In D.21-06-015, Attachment 2, Section 7, the Commission allowed the IOUs to consider a variety of program designs, including regional implementation, particularly in the shared service area for SoCalGas and SCE for the ESA WH Pilot. SoCalGas and SCE are jointly implementing the pilot to reduce customer confusion, streamline the process and costs of the Joint Pilot, and to provide more comprehensive services that include both gas and electric measures to customers. As was done in the 2024 research program, the 2025 research effort featured significant process evaluation research with customer participants and non-participants (NP) to help explain program strengths and weaknesses as program uptake remained below targets. Limited impact evaluation work was completed in 2025.

**Process Evaluation – Non-participant (NP) Survey Results**

The NP survey was structured to provide feedback to SCE, SoCalGas, and the implementer on the characteristics of customers who have not yet participated in the pilot (non-participants) and deliver insight about their experiences and barriers regarding pilot outreach, awareness, and experience.

**Key Findings from Non-participant Survey**

- While half of the respondents reported that they had seen or heard of the pilot, when prompted, most respondents did not remember seeing direct mail about the pilot, which may mean that they are conflating or confusing programs.
- Potential data quality issues in the implementation data could hinder the success of pilot marketing and execution, as well as its evaluation.
- Of respondents who indicated that they knew of the pilot learned about it from direct mail (38%, n=45) but reported preferring email for future outreach.
- After reviewing pilot marketing materials, respondents generally found the fact sheet to be useful, though some need more information or reassurance before applying.
- The information provided through marketing materials may not be sufficient to educate customers on program offerings and qualifications.
- Respondents who wanted additional details most often cited wanting to know how much the program would cost, qualification requirements, and options if they do not qualify.
- After reviewing the pilot marketing materials, most respondents did not have any additional outstanding questions about pilot details.
- Slightly more than half of respondents reported having high electric bills, which aligns with criteria used to target customers for the pilot.
- Most respondents were homeowners in older homes who had lived in their homes for more than five years. They primarily used central air conditioning to cool their homes, a gas furnace to heat their homes, and either a programmable or manual thermostat.
- Most respondents (1) identified as white; (2) speak English and identified this as the language they spoke most often; and (3) have some college, a technical college degree, or a two-year college degree.

**Contractor Survey Findings**

The process evaluation research also included program participant and contractor interviews. The objectives were to gain insights into how program processes are working, what successes and challenges they are having, and suggestions for improvement.

- Many of the contractors who work with the Whole Home Pilot are also active in the ESA Main program and have had previous experience working with SCE and SoCalGas.
- Feedback from active contractors suggests that program improvements are proving effective in reducing the challenges they experience in completing jobs, and the steady increase in assessments, enrollments, and installations in the past six months supports this. However, there are some notable issues identified in previous interviews regarding 2023 program experiences that persist in 2025:

**Persistent Program Challenges**

- Continued poor quality of leads (information outdated, customers ineligible)
- Slow reviews of assessment and modeling
- Customers' lack of knowledge of the program
- Customer utility data requirements
- Delays due to one HERS rater

**Interim Impact Evaluation**

The goal of the Interim Impacts Findings Report of 2025 includes the following:

- Estimate the annual electricity and gas savings for participants in the Plus and Deep pathways for the ESA Whole Home Pilot program.
- Compare estimated impacts with ex ante values from tracking data provided by the implementer.
- Summarize bill impacts (pending).

The research team decided upon the following methodology:

1. Develop control groups

2. Weather normalize both pre- and post-usage data
3. Use OpenDSM's OpenEEmeter Python libraries for computations
4. Build an hourly model for electric impacts
5. Develop a standard billing model for gas impacts
6. Estimate a two-stage difference-in-differences (DiD) model via "did2s" R package with a first stage to remove fixed effects of time and location

**Analysis Results**

- Savings for the Plus pathway were largely aligned with ex ante values, hence consistent with the realization rate.
- For the Deep pathway, however, while some ex-post savings align with estimated savings, the majority are well below the 15% savings threshold to qualify for Deep.
- For gas, both the Plus and Deep pathways exhibit ex post savings that were lower than ex ante values.
- There was some evidence that ex ante estimates for Deep were excessively high.
- There was no tracking data pre-usage to cross validate.
- Savings were estimated robustly, considering the very small sample size.
- Statistically significant savings of around 10% for electric were found.
- There were no significant results for gas.
- Tracking data consistency complicates our ability to identify sources for the low realization rates.
- With a larger sample and resolved tracking issues, the second phase of analysis should shed more light on the pilots' impacts.

***ESA Building Electrification Pilot Evaluation***

SCE ESA BE Pilot continued evaluation activities throughout calendar year 2025 to assess program design, implementation effectiveness, anticipated energy and GHG impacts. The evaluation is designed to support regulatory

oversight, inform continuous program improvement, and generate insights to guide future income qualified electrification program design.

**Evaluation Scope and Objectives**

The ESA BE Pilot evaluation is structured to assess both process and impact elements across the lifecycle of the pilot. The evaluation focuses on, but is not limited to, the following objectives:

- Assessing the effectiveness of Pilot design and delivery approaches used to support comprehensive BE in income qualified single family homes
- Assessment of Pilot benefits and costs
- Evaluating customer experience across enrollment, assessment, installation, and post installation phases
- Examining contractor and implementer processes, including coordination, timelines, and implementation challenges
- Assessing expected energy savings, fuel substitution impacts, and GHG reduction potential and customer bill impacts using approved methodologies
- Identifying implementation lessons learned and opportunities to improve scalability, cost effectiveness, and customer outcomes in future program offerings

**Evaluation Activities Conducted in 2025**

During 2025, evaluation activities progressed to support both formative learning and preparation for subsequent reporting. Key activities completed or advanced during the year included:

- Continued development and refinement of the evaluation framework covering process evaluation and impact evaluation planning
- Ongoing coordination between the BE Program team, implementer, and Evaluation, Measurement, and Verification (EM&V) teams to support data availability and evaluation readiness
- Program documentation and implementation approach review to support evaluation design and planned assessment activities

- Continued collection and organization of participation and project tracking information to support future process and impact evaluation reporting

**Interim and Draft Evaluation Reporting (Timing and Treatment)**

Interim impact and process evaluation findings and related draft materials were not completed for review during 2025; interim findings were developed and circulated for internal review in 2026. Accordingly, interim findings are not reported in this 2025 Annual Report narrative.

**Relationship to Program Performance**

Evaluation activities in 2025 occurred alongside continued implementation of the ESA BE Pilot, which maintained a pipeline of projects across enrollment, installation, and completion phases. The evaluation design accounts for the program's phased delivery approach and incorporates learning from operational experience to ensure that evaluation outputs reflect implementation conditions.

**Next Steps and Forward-Looking Evaluation Milestones (Early 2026)**

Evaluation activities for the ESA BE Pilot continue into early 2026. Planned milestones include completion of interim evaluation reporting deliverables and continued data collection to support a comprehensive final impact evaluation report consistent with the evaluation plan.

**Clean Energy Homes Pilot**

The CEH Pilot was approved for closure in 2024 due to sustained underperformance and limited market interest. As a result, PY 2025 evaluation activities focused primarily on program ramp-down, close out, and documentation of lessons learned to inform future program design.

SCE worked with the program evaluator Apex Analytics (Apex) to complete close out research activities. Prior evaluation planning and data

collection efforts conducted in earlier years informed the 2025 close out work but were not the primary focus of PY 2025 activities.

**PY Close-Out 2025 Activities**

During 2025, SCE coordinated with the CPUC ED regarding the program phase-down and close-out approach. Evaluation activities in PY 2025 included:

- Continued targeted interviews with market participants and program and implementation staff to better understand persistent barriers to participation.
- Focused assessment of program design, eligibility criteria, incentive structure, and market conditions contributing to low enrollment.
- Development of documented lessons learned to support program closure and inform future affordable housing and new construction program designs.

Apex synthesized findings from prior evaluation work and PY 2025 close-out research. Apex delivered a lessons learned memorandum which supported SCE's decision to phase down and close the CEH Pilot.

**Key Lessons Learned and Recommendations**

Based on the close-out research conducted in 2025, the following recommendations were identified:

- **Geographic Eligibility:** Restrictive geographic eligibility significantly limited the pool of eligible applicants. Expanding eligibility to include all SCE, IOU, and non-IOU territories may have increased participation and improved equity in the distribution of program benefits. Market conditions, geographic constraints, and eligibility parameters collectively limited the program's ability to demonstrate success.
- **Design Assistance & Incentive Offering:** Program requirements did not align well with standard development workflows. In particular, the pre permit design review requirement created administrative friction and constrained participation. While the intent was to maximize implementation of best practice recommendations, similar benefits could have been achieved by offering non-mandatory design guidance. Design incentives were also

insufficient to motivate participation. Increasing base design incentives on a per bedroom basis and raising the incentive cap may have made the program more competitive. The program's incentive targets exceeded available market supply, limiting overall participation.

- **Tenant Education Offering:** The tenant education component would have benefited from a more structured approach. A dual pathway model—offering both standardized, pre-approved activities supported by program developed materials and a custom pathway for tailored scopes of work—may have improved participation and outcomes.

Participants expressed ongoing uncertainty regarding reimbursement for time and labor, underscoring the need for clearer guidance and proactive communication. Explicit direction on reimbursable costs, including limited administrative expenses (capped at 15 percent of total incentives), site management training, and operations and maintenance training for maintenance staff, could have supported more meaningful engagement. Given that installed equipment was new, future programs should also support strategies to sustain long term GHG reduction outcomes.

Since the CEH Pilot was closed, the close out evaluation  did confirm that incentive programs supporting new construction affordable housing require strong alignment with market conditions, development workflows, and incentive adequacy to succeed. Lessons learned from the CEH Pilot will inform the design of future programs. The BUILD Program continues to serve as a strong example of an effective model when these conditions are met.

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

No Pilots have been completed during 2025.

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

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

**ESA WG**

D.21-06-015 specified the requirement for the IOUs to establish an ESA WG with multiple sub-groups to address a diverse set of program operations and improvements; one of the guiding principles being to provide energy savings and hardship reduction to low-income households in line with IOU program goals. The ESA WG held its first kick-off meeting in January 2022 and since then, the group has been meeting six times a year to address specific subjects and/or deliverables with rotating SWG discussions.

The ESA WG functions were initially divided into the ESA Council and three Sub-Working Groups (SWGs): ESA Program Cost-Effectiveness (CE) SWG, ESA Program Policy & Procedures and Installation Standards Manuals (PP&IS) SWG, and Universal Application System (UAS) SWG. D.22-12-029 added the CARE/FERA Post-Enrollment Verification (PEV) SWG to expand the SWGs from three to four for PY 2023.

The ESA WG operates with specific guiding principles that are outlined in the Charter and Governance documents, and once the planned SWG tasks are completed, the SWG members delegate the SWG charter back to ESA WG. Prior to 2025, three of the four SWGs were completed: the CARE/FERA PEV SWG in 2024, the ESA Program CE SWG in 2023 and UAS SWG in 2022.

**CARE/FERA PEV SWG**

This SWG was tasked with developing recommendations for improving the income verification procedures policies. This SWG was open to the public and supported by selected ESA WG Members. Although this SWG ended activity at the close of the 2023 PY, the IOUs didn't present their conclusive annual findings until the ESA WG June Public Meeting in 2024, officially completing this SWG.

Status: Completed in 2024.

**PP&IS SWG**

The statewide PP&IS Manuals Sub-Working Group (PP&IS SWG) discusses and recommends revisions to the P&P Manual and IS Manuals and conducts an initial assessment of "healthy building materials," and reviews proposed revisions to Main ESA and MFWB measures. Since 2022, this SWG has held public meetings and is supported by selected ESA WG Members. This SWG meets on the second Wednesday every other month, is open to the public and accepts new participants.

Status: Ongoing into 2026.

### 1.10.2 What were the accomplishments of each WG and SWG in the 2025 PY?

**2025 ESA WG**

In 2025, the ESA WG grew to twelve non-IOU members, comprised of contractors and non-profit organizations and retained four IOU members and one ED representative. The ESA WG completed six statewide public meetings throughout 2025, capturing the interest of more than 400 total attendees including ESA WG IOUs, non-IOUs member organizations and the public.

In addition to delivering annual and monthly reports as outlined in the decision, the ESA WG collaborated on several additional items including, but not limited to:

- The Clean Energy workshop,
- IQP California Energy Data and Reporting System (CEDARS) updates,
- Pilot Program budget(s),
- Northern and southern Multi-Family programs,
- Income qualified potential and goals study report results,
- ESA workforce development,
- PG&E FERA barriers studies,
- ESA BE pilot AL,
- Full cycle applications, and

- Contractor experiences with city permitting process, marketing and outreach.

**2025 PP&IS SWG**

The PP&IS SWG continued executing its core function throughout 2025 including revisions and updates to the manual, updates to PP&IS measure specifications to include polices and installation standards and modifications, and revisions to the charter. The SWG met bi-monthly and provided updates and/or presentations in five out of six ESA WG public meetings.

2025 accomplishments for this SWG include but are not limited to the following:

- Released two revisions of statewide ESA program P&P manual,
- Completed one revision of IS Manual (v.1.5),
- Released two revisions of MFWB Program P&P Manual,
- Completed one revision of Measure Spec Manual (v4.0),
- Provided loading order (LO) guidance to ESA WG Council and ED,
- Developed infographic document detailing partial electrification's effects on the pressure dynamics of a home and examples of when NGAT may be needed,
- Developed decision tree outlining when combustion appliance testing is needed during electrification and
- Developed guidance document regarding upgrading and sizing the main distribution panel.

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

In 2025, the ESA WG held a total of six public meetings and 12 council meetings. Throughout the six Public Meetings, the ESA WG presented a combination of annual and monthly reports as outlined in the decision as well as additional meeting topics as suggested by stakeholders. In addition to the public and council meetings held, two additional meetings were held to help further achieve the objectives outlined in the Decision and Charter: The Multi-Family

workshop and the TECH Low Income Electrification Findings presentation. Both in collaboration with the ED, the Multi-Family workshop was held to discuss the MFWB program model and multifamily-specific challenges while the TECH Clean California team presented insights and analysis on the benefits, opportunities, and strategies for advancing low-income electrification for ESA-eligible customers—specifically focusing on heat pump deployment in alignment with both programmatic and state heat pump adoption goals.

Ongoing opportunities for growth identified during the 2025 PY included balancing HCS and energy savings measures; ESA workforce development planning, training, and recruitment; outreach and marketing adaptations for contractors; permit acquisition and inspection delays; Multifamily Whole Building program challenges; and program lessons learned as new Full Cycle Applications are prepared. The WG has discussed and set goals for the 2026 PY including a list of priority topics and objectives to address the challenges faced in 2025.

## 1.12 Multifamily Properties

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

SCE's Multifamily Market Characterization Final Report, dated October 23, 2025, provides a comprehensive assessment of five-plus unit multifamily properties within SCE service territory and serves as a reference framework for documenting multifamily housing stock characteristics, energy consumption patterns, and low-income eligibility in support of regulatory reporting requirements. This section summarizes key characterization findings using consistent methodology and terminology applied in prior PY reporting.

The market characterization was developed by Residential Energy and Water Intelligence (Res-Intel) using a combination of tax assessor records, commercial property databases, low-income housing datasets, and SCE electric meter metadata. Multifamily properties were identified as sites with five or more

dwelling units, and multi-parcel developments were aggregated to the site level to improve data accuracy. Properties were classified as deed-restricted using federal, state, and local affordable housing databases, while all remaining properties were categorized as non-deed-restricted.

Based on the updated analysis, SCE identified 39,014 multifamily properties with five or more units, representing approximately 889,887 dwelling units across the service territory. Of these, 1,794 properties were identified as deed-restricted low-income multifamily sites, accounting for approximately 126,014 units. The remaining properties were classified as non-deed-restricted market-rate multifamily housing.

The multifamily portfolio is geographically concentrated in highly urbanized areas and is primarily composed of small- to mid-sized properties. While the majority of properties consist of fewer than 20 dwelling units, larger properties represent a disproportionate share of total units. Properties identified as mixed-use account for a relatively small portion of the overall portfolio and were analyzed separately for energy benchmarking purposes due to differing load characteristics.

Energy consumption metrics in the characterization study are reported using benchmarking-based Energy Use Intensity (EUI). The average Site EUI for non-mixed-use multifamily properties is approximately 14.9 kBtu per square foot, as reported in the Final Report. These values are provided for descriptive purposes only and do not reflect ESA program tracking data.

| Property Type | Estimated Number of Properties | Estimated Total Conditioned Area (million sq. ft.) | Average Conditioned Area per Property (thousand sq. ft.) | Average Site EUI (kBtu/sq.ft.) | ESA-Treated Properties |
|---|---|---|---|---|---|
| Deed-Restricted Multifamily | 1,794 | ~126 | ~70 | ≈14.9 | 33 |
| Non-Deed-Restricted Multifamily | 37,220 | ~764 | ~20 | ≈14.9 | 0 |
| Total | 39,014 | ~890 | — | ≈14.9 | 33 |

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

Multifamily common area activities in southern California are delivered through the Southern MFWB program and focus on enrolling eligible multifamily properties, conducting comprehensive assessments, and installing approved common area measures (CAM) as part of a coordinated whole-building approach. In SCE's service territory, PY 2025 activities emphasized property owner engagement, technical assessments, development of incentive proposals for common area and whole-building measures, coordination with owner-selected or qualified trade ally contractors, and inspection and verification prior to project closeout.

By the end of 2025, 33 multifamily common area projects were completed within SCE's service territory, resulting in EE upgrades benefiting 9,894 tenant units. All common area projects were implemented exclusively within deed-restricted low-income multifamily properties. No electrification projects were completed within SCE's service territory during 2025, as program efforts during the year were primarily focused on establishing project pipelines, completing assessments, and advancing non-electrification CAM.

Program delivery during the first half of 2025 was significantly affected by system configuration and invoicing challenges that disrupted contractor payment processing and slowed field activity. These issues constrained production early in the year and contributed to delays in project initiation and completion. In addition, reporting limitations reduced program visibility and limited timely performance monitoring during the early portion of the PY.

To mitigate these challenges, corrective actions were implemented to stabilize operations and support continued delivery. These actions included adjustments to payment processes, accelerated invoice review procedures, and temporary advance funding to maintain subcontractor stability and preserve production capacity. As system functionality improved later in the year, program delivery progressed, accompanied by increased contractor capacity, improved documentation quality, and reduced invoicing delays.

As of the end of 2025, 156 multifamily properties within SCE's service territory had active project plans in various stages of development, demonstrating a pipeline of future common area work. In addition, the implementer, RHA, reported their pipeline includes 1,062 multifamily property prospects, including electrification opportunities. Enhanced coordination with complementary initiatives such as the SOMAH and TECH programs may create opportunities to enhance integrated service delivery in future program years.

### 1.12.3 Normalized Metered Energy Consumption (NMEC) Analysis of Multi-family Common Area Measures (MF-CAM) Initiative.

As per D.16-11-022 and D.17-12-009, current Multifamily Common Area Measures (MF CAM) annual reports are expected to include normalized energy use and savings, which amounts to measuring savings at the meter using Advanced Metering Infrastructure (AMI) data. The analysis requires 12-months of metered consumption data, prior to and after measure installation. As such, this analysis was conducted for the two properties treated between January 2024 and December 2024, with a minimum of 12-months of post-installation consumption data by the end of PY 2025.

| | Targeted Units | Installed Measures |
|---|---|---|
| Site 1 | 58 | Heat Pump Split System + Smart Thermostat |
| Site 2 | 30 | Smart Thermostat + Power Strip |

Based on the modeled results, neither property produced statistically significant results using the pre-specified alpha level of 0.05[23]. On the portfolio-level, the ESA related changes did not have a significant impact on decreasing usage across the two eligible properties.

| | |
|---|---|
| Annual Pre-Period Usage | 119.8 MWh |
| Estimated Savings | -0.2 MWh |
| 95% Confidence Interval | [-9.1 MWh, 8.8 MWh] |

[23] Pre- and post- usage data were intentionally excluded to safeguard customer privacy in accordance with data protection requirements.

# CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE) ANNUAL REPORT

## 2. CARE PROGRAM EXECUTIVE SUMMARY

### Summary of 2025 Results

The CARE program provides a discounted electric rate to income-qualified customers within SCE's service territory whose household income does not exceed 200 percent of the Federal Poverty Guidelines.[24] Eligible customer segments include single-family residences, sub-metered multi-family properties, nonprofit group living facilities, agricultural employee housing, and migrant farmworker housing. Enrolled customers receive an average rate reduction of approximately 32.5 percent on their monthly electricity charges.[25]

This Annual Report summarizes SCE's CARE program performance for PY 2025, including enrollment outcomes, outreach activities, and program expenditures. As of year-end 2025, CARE enrollment totaled 1,364,107 customers, representing a penetration level of 106 percent of the estimated eligible population.[26] Compared to the prior year, CARE participation increased by 64,488 customers. CARE customers realized an average monthly electric bill reduction of $55.03 in 2025. In total, SCE delivered more than $876 million in CARE rate subsidies to participating customers during the reporting period.

### Procedural Background

Consistent with the ESA program, the CARE program operated in 2025 in accordance with the direction and program requirements set forth in D. 21-06-015. Among its key directives, D.21-06-015 authorized SCE's CARE administrative budget and subsidy forecast for PY 2021–2026 and established a minimum CARE enrollment goal of 92 percent within SCE's service territory for those program years.[27] Within this Commission-approved framework, SCE

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24 California Public. Utilities Code § 739.1(a).

25 Following D.25-06-010 and effective June 1,2025, CARE residents of Catalina Island, receive the following discounts: electricity, water and gas at 32.5%.

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

27 D.21-06-015, Attachment 1.

administered the CARE program in compliance with applicable eligibility criteria and administrative requirements.

Recent legislative actions further expanded CARE program eligibility and introduced targeted structural enhancements to better align the program with State housing and homelessness initiatives. Assembly Bill (AB) 2672 extended CARE eligibility to income-qualified residents of Project Homekey–funded housing developments.[28] Project Homekey is a State-administered initiative established through legislative and budgetary actions to accelerate the development of permanent supportive housing by enabling the acquisition, rehabilitation, and conversion of existing properties, including hotels and motels, to address homelessness, which SCE implemented for CARE eligibility effective June 1, 2025.

AB 205[29] directed the CPUC to implement an income-graduated fixed charge for residential electric rates. In D.24-05-028, the CPUC established a new Base Services Charge (BSC), which SCE implemented for residential customers in late 2025, with discounted charges for CARE and FERA customers. The BSC recovers a portion of fixed grid costs and is intended to promote greater equity and affordability. Monthly charges are $6 for Tier 1 customers (up to 200 percent of the federal poverty level or CARE-eligible), $12 for Tier 2 customers (200–250 percent of the federal poverty level or FERA-eligible), and $24 for all other residential customers.[30]

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[28] AB 2672 amends PUC Section 739.1(i), *available at* https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=PUC&sectionNum=739.1.

[29] In June 2022, the California Legislature enacted Assembly Bill (AB) 205 (Stats. 2022, Ch. 61).

[30] Resolution E-5356, p. 5.

## 2.1 Participant Information

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

| CARE Table 2.1.1.1<br>2024 Residential CARE Program | | |
|---|---|---|
| Electric Enrollments by Month | | |
| **PY 2025** | **CARE Enrollments** | **Percentage Change** |
| Jan | 1,353,319 | |
| Feb | 1,350,016 | -0.26% |
| Mar | 1,337,247 | -0.99% |
| Apr | 1,338,136 | 0.07% |
| May | 1,332,105 | -0.47% |
| Jun | 1,328,245 | -0.30% |
| Jul | 1,329,989 | 0.14% |
| Aug | 1,335,829 | 0.45% |
| Sep | 1,350,779 | 1.16% |
| Oct | 1,353,642 | 0.22% |
| Nov | 1,358,502 | 0.38% |
| Dec | 1,364,107 | 0.44% |

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

SCE used the joint utility methodology adopted in D.01-03-028 to develop monthly enrollment estimates by energy source in 2025.[31] This methodology entails annual estimation of eligibility for CARE, FERA and ESA and other

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

income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state.

Sources for the 2025 eligibility estimates included:

- The January 2025 Health and Human Services (HHS) Federal Poverty Guidelines (FPG)[32] ("bundling" one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327),
- Current year small area vendor marginal distributions on household characteristics,
- Census American Community Survey (ACS) Five Year Summary Block Group Data (2020-2024),
- Five years of American Community Survey Public Use Microdata Survey (ACS PUMS: years 2019-2024, skipping Covid-impacted 2020 data),
- Utility individually-, sub-, and master-metered household counts,
- Department of Finance Consumer Price Index series, and
- Various Geographic Information System sources.

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

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

SCE counts the number of households (by small area, by county, and overall) that are enrolled in CARE. The CARE household total, including

[32] Federal Register/Vol. 90, No. 11/January 17, 2025/Notices; p.5917.

individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility to estimate the CARE enrollment rate.

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

The joint utility methodology, as described above, was used throughout 2025.

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

CARE program eligibility is based on small and large areas, focusing on individual residential meters and sub-metered units. Master meters without sub-meters and non-residential meters are excluded from the "technical eligibility" count.

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

Refer to ***Section 2.1.2*** for details. This approach estimates household size at the block group level using current income and householder-age data. These estimates are linked with counts of metered households at the small-area level. Utility-specific estimates are then adjusted to various geographic levels within the utility area, such as Zip+2, ZIP tract, county, and territory. Additionally, statewide estimates are provided for all areas, regardless of utility boundaries.

#### 2.1.2.4 Describe how current CARE customers were counted.

SCE produces a monthly report detailing all flagged customers currently enrolled in the CARE program within the specified date range. This report includes critical enrollment information necessary for reporting purposes, such as program status, enrollment dates, and recertification/verification process dates.

Additionally, SCE generates a separate report for tenants who receive the CARE discount through their master-metered facilities. This report identifies the number of dwelling units in each master-metered facility marked as enrolled in the CARE program. SCE provides a report, or Tenant List, to each master-meter customer. See ***Section 2.1.7*** hereof, where SCE explains the mismatch that occurred between the Tenant Lists and the number of units receiving a CARE or FERA discount (as well as MBL allocations) on the master-meter customer's bill. The current CARE customers are counted based on "enrolled" customers, which is reflected on the Tenant Lists.

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

The energy source-specific participation rate is calculated by dividing the total number of CARE customers participating in each energy source by the estimated eligible CARE population for that energy source.

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

| | |
|---|---|
| Electric | 29% |
| Gas[33] | 11% |

[33] SCE only provides gas services on Catalina Island; 11% is based on the number of CARE gas customers (147) divided by the total of Catalina Island accounts (1,390).

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

| | |
|---|---|
| Electric | 45,026 |
| Gas | N/A |

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

| | |
|---|---|
| Electric | 20,285 |
| Gas | N/A |

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

| | |
|---|---|
| Electric | 45% |
| Gas | N/A |

**2.1.7 Discuss any problems encountered administering the CARE Program for sub-metered tenants and/or master-meter customers during the reporting period and how they were addressed to resolve them.**

Domestic Master-meter Service (DMS) customers are property owners or managers with multiple sub-metered units under a master meter. DMS customers are billed by SCE for the total usage shown on the master meter. DMS customers must pass through any CARE/FERA discounts or MBL credits to enrolled tenants. The number of units enrolled in CARE/FERA and/or MBL programs, along with the total discounted or credited amount, is stated on the DMS customer's bill.

Since 2021, customers being enrolled into CARE, FERA or MBL ("Programs") were being manually entered into SCE's Program enrollment system. However, the manual process that updated the billing system to reflect sub-metered tenants' enrollment in the Programs was not consistently performed and eventually stopped. This led to discrepancies between the number Program discounts and allowances the DMS customer was entitled to receive for its sub-

metered tenants and the credits and allowances actually received by the DMS customer on their bills. In some cases, the discrepancy caused a DMS customer to receive more Program discounts than it should have received, and in other cases, the discrepancy caused a DMS customer to receive fewer Program discounts than it should have received based on the number of sub-metered tenants enrolled in the Programs.

Additionally, approximately 250 DMS service accounts experienced a change that required a new account to be opened. For these DMS sites, the CARE/FERA discounts and MBL allowances were not transferred to the new account, resulting in a loss of the associated CARE/FERA discounts and MBL allowances. In 2025, SCE corrected the Programs enrollment issues on a going-forward basis.

In May 2025, SCE also found that recertification letters had not been sent to customers, leading to some customers being de-enrolled from the Programs. SCE has now re-enrolled incorrectly removed customers and started the rebill process in December, issuing appropriate bill credits as part of the overall DMS remediation efforts.

Throughout 2025, SCE worked with ED to develop a remediation plan that included: rebilling the DMS customers, informing DMS customers and their tenants of the error and their respective rights and obligations with respect to the billing credits provided by SCE to the DMS customers, and locating tenants that have moved out.

On September 23, 2025, SCE also met with the California Public Advocates Office to socialize the remediation plan and respond to questions regarding the issue.

On November 18, 2025, SCE submitted a Tier 1 DMS Remediation AL (Advice 5686-E) which was accepted on December 17, 2025, without protest.

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

As part of the Mobile Home Park (MHP) Utility Conversion Program, SCE integrates targeted customer education and outreach to ensure MH residents are aware of available assistance programs. Once an MHP is selected, SCE conducts onsite informational meetings and coordinate resident communications. During these engagements, CARE enrollment materials and EE literature are distributed to explain eligibility requirements, program benefits, and application options, helping income-qualified residents access bill assistance and energy-saving resources. In parallel, SCE supports the conversion of MHPs from sub-metered service to direct utility service by coordinating closely with park owners throughout application, construction, and resident engagement. Upon transfer to direct service, back-end operational processes ensure that customers already enrolled in CARE, FERA, or MBL are seamlessly transitioned to new individual accounts without disruption of benefits, while customers not previously enrolled are provided information on how to apply. These coordinated outreach and operational efforts facilitate a smooth customer transition while preserving affordability protections for eligible households.

## 2.2 CARE Budget Summary

### 2.2.1 Please provide CARE Program summary costs.

**CARE Table 2.2.1.1**
**2025 CARE Program Summary Costs**

| CARE Budget Categories | 2025 Authorized Budget | 2025 Actual Expenses | % of Budget Spent |
|---|---|---|---|
| Outreach | $ 3,794,128 | $ 1,731,404 | 46% |
| Processing, Certification and Recertification | $ 1,660,211 | $ 1,982,343 | 119% |
| Post Enrollment Verification | $ 524,278 | $ 162,061 | 31% |
| Information Tech./Programming | $ 570,000 | $ 154,616 | 27% |
| CHANGES | $ 525,000 | $ 486,962 | 93% |
| Measurement and Evaluation | $ 36,000 | $ 75,091 | 209% |
| Regulatory Compliance | $ 597,354 | $ 634,634 | 106% |
| General Administration | $ 1,459,095 | $ 2,423,028 | 166% |
| CPUC Energy Division Staff | $ 135,625 | $ 199,218 | 147% |
| **Total Expenses** | **$ 9,301,691** | **$ 7,849,358** | **84%** |
| Subsidies and Benefits | $ 421,034,721 | $ 867,781,311 | 206% |
| **Total Program Costs and Discounts** | **$ 430,336,412** | **$ 875,630,669** | **203%** |

In 2025, total CARE administrative expenditures were $7.85 million, representing 84 percent of the authorized administrative budget of $9.30 million. Spending supported core program operations, eligibility oversight, and regulatory requirements in a year marked by sustained, high CARE participation levels.

Administrative expenditures exceeded authorized amounts in select categories, including Processing, Certification, and Recertification, General Administration, and Regulatory Compliance. These cost levels align with the operational demands associated with very high program participation, including increased application processing volumes, ongoing eligibility maintenance, centralized program management support, and the scope and timing of required regulatory activities.

By contrast, Marketing and Outreach expenditures were below authorized levels, reflecting a controlled reduction in outreach activities as CARE continued to demonstrate participation rates above the estimated eligible customer population. Lower spending in this category is consistent with a mature program environment in which broad-based outreach was not necessary to sustain enrollment levels.

Administrative spending supported the delivery of CARE benefits while maintaining compliance with Commission requirements. Program subsidies reached 206 percent of the authorized subsidy budget in 2025, reflecting a significant increase in enrolled customers combined with rising electricity rates over time, which together drove higher aggregate discount levels. CARE bill discounts and subsidies totaled $867.8 million, resulting in total program costs and discounts of $875.6 million for the year.

**Community Help and Awareness of Natural Gas and Electric Services (CHANGES) program**

The CHANGES program, which assists customers with limited English proficiency (LEP) through CBOs, is administered by the International Institute of Los Angeles (IILA). IILA has been a longstanding member of the CHANGES statewide consortium since 2010.

The CHANGES staff and IOUs continued to meet quarterly throughout 2025 to discuss updates on

- CHANGES Evaluation
- Bridge Funding
- CARE Proceeding
- Website updates
- Factsheet updates
- IOU updates on residential or other program services (if any); and
- IILA updates on CHANGES activities

SCE met with CHANGES staff to strengthen interactions between SCE, CHANGES CBOs, and LEP customers. SCE moved back to supporting CHANGES CBOs through a dedicated support line for CHANGES at 1-866-743-1648, where SCE agents are trained to handle CHANGES-related issues, including payment plans. In addition, SCE shared some CHANGES CBOs have adopted call-handling practices that are counterproductive. These concerns were shared with CPUC staff to discourage continuation of those practices.

### 2.2.2 Please provide the CARE Program enrollment rate to date.

| Participants Enrolled | Estimated Eligible Participants | Enrollment Rate | Target Met? |
|---|---|---|---|
| 1,364,107 | 1,284,448 | 106% | Yes |

### 2.2.3 Discuss any issues or challenges to maintain enrollment goals, including enrollment, recertification, and post-enrollment verification, how those issues or challenges were addressed, and why goals were not met (if applicable).

During the reporting period, SCE met and exceeded CARE enrollment targets. While operational and external factors affected recertification and PEV activities, these challenges did not materially affect program participation or SCE's ability to sustain enrollment levels.

SCE administered PEVs for Traditional and High-Usage CARE customers consistent with Commission-approved criteria, using targeted customer selection and reminder notifications to support timely completion while minimizing unnecessary attrition. Consistent with D.19-07-015, CARE and FERA customers subject to an Emergency Protection Order (EPO) are exempt from recertification and PEV requirements during the protected period. EPOs, declared by the Governor of California, provide consumer protections for customers experiencing disaster-related service disruption or degradation for at least 12 months, with extensions as applicable. During this period, SCE is required to suspend CARE/FERA removals, postpone recertification requests, and freeze PEV activities.

Historically, SCE implemented EPO protections using a "ZIP-code approach," under which all CARE and FERA customers within an EPO-impacted ZIP code received these protections. Beginning in December 2025, SCE transitioned to protecting only directly impacted customers, defined as those who experienced service disruption or degradation during the emergency event, as

specified in D.19-07-015.[34] SCE identifies directly impacted customers using customer self-reports, damage assessments conducted by SCE or external agencies, and outage data. An exception remains for Domestic Master-Metered Service (DMS) customers and Traditional/High-Usage PEVs, for which SCE continues to apply EPO protections at the ZIP-code level. SCE intends to transition these remaining activities to a directly impacted customer approach in 2026. As of December 2025, 155 of 770 ZIP codes in SCE's service territory were subject to an EPO, based on outage events lasting 24 hours or more[35].

In June 2025, SCE identified issues in which CARE/FERA recertification and verification notices were inadvertently issued to customers under active EPOs. These customers should have been exempt from recertification, verification, disconnections, late payment charges, reconnection fees, and deposits. The issue resulted from system configuration and process gaps, including incomplete ZIP-code suppression logic, reliance on mailing addresses, rather than premise addresses, ZIP+4 mismatches, and legacy limitations following the COVID-19 moratorium. As a result, some customers were incorrectly removed from CARE/FERA or transitioned between programs.

In August 2025, SCE proactively disclosed the issue to ED and began providing biweekly remediation updates to the ED. As of year-end, SCE had re-enrolled and corrected approximately 1,000 directly impacted customers and implemented the following remediation actions:

- Conducted a root-cause analysis identifying
- System and process gaps effecting EPO-related suppression of recertification and verification activities.
- Implemented enhanced controls to prevent future errors, including addressing delayed EPO declarations and enrollment changes such as move-ins and AMP participation.

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34 See D.19-07-015, Conclusion of Law 4 and 5.

35 It should be noted that the count and expiration dates are subject to change as new EPO events are called and causes ZIP codes to be assigned a new date later than in previous reporting.

- Re-enrolled directly affected CARE/FERA customers, prioritizing those under active EPO protections.
- Issued bill credits through standard Rule 17 billing correction processes for customers with enrollment gaps, with approximately 26 percent of impacted accounts credited by year-end 2025.
- Refined impact analysis by transitioning from print-literal review to billing operand data to improve accuracy.

In addition, SCE addressed DMS account enrollment and billing issues in 2025, as discussed further in Section 2.1.7. Throughout the year, SCE implemented system enhancements and process improvements that supported sustained CARE participation, resulting in SCE meeting or exceeding all CARE enrollment goals during the reporting period.

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

The table below presents a monthly summary of customer complaints related to CARE recertification activities that were received and resolved by SCE's Consumer Affairs Department. Complaints associated with recertification generally involve issues related to benefit removals, processing delays, and program eligibility questions.

In 2025, SCE continued tracking both informal and formal complaints related to CARE recertification. Based on SCE's review, no formal complaints pertaining to CARE recertification were received during the reporting year. Formal complaints are filed with the Commission's Consumer Affairs Branch (CAB) and are adjudicated through a formal hearing process. This tracking was implemented to strengthen oversight and enhance transparency in complaint reporting.

SCE continued to address CARE/FERA and MBL issues throughout 2025, including matters affecting tenants served under DMS arrangements, as discussed in the 2024 Annual Report and further explained in Section 2.1.7. As part of these

ongoing efforts, SCE conducted an additional review of customer contact databases to identify potential informal complaints related to CARE recertification that may not have been escalated to the Consumer Affairs Department. This review did not identify any additional recertification-related complaints warranting reporting.

| Month | CARE Recertification Complaint Received | Nature of Complaint |
|---|---|---|
| January | 1 | Customer CARE account had a missing discount and bill discrepancy. |
| February | 2 | Customer CARE account had a missing discount. |
| March | 2 | Customer inquiry on the recertification process |
| April | 1 | Customer inquiry on the recertification process |
| May | 1 | Customer inquiry on when they are required to recertify |
| June | 4 | Customer inquiry on the recertification process |
| July | 3 | Customer inquiry on the recertification process |
| August | 2 | Customer inquiry on the recertification process |
| September | 1 | Various questions pertaining to the recertification process |
| October | 3 | Removed from rate due to failure to complete recertification |
| November | 1 | Customer CARE account had a missing discount. |
| December | 0 | |

## 2.3 CARE Program Costs

### 2.3.1 Discount Cost

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

| | |
|---|---|
| Average Monthly Electric Discount | $ 55.03 |

| | |
|---|---|
| Average Monthly Gas Discount[36] | $ 14.39 |

The average monthly CARE discount cost is calculated by dividing the total recorded CARE bill discount for each month by the number of enrolled CARE customers in that month and then averaging those monthly per customer discounts over the 12-month reporting period.

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

| | |
|---|---|
| Electric Subsidy | $ 867,781,311 |
| Gas Subsidy[37] | $ 25,341 |

**2.3.2 Administrative Cost**

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

See CARE Table 2.2.1 – CARE Program Summary Costs.

**2.3.2.2 Explain what is included in each administrative cost category.**

**Outreach**

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

**Processing, Certification and Recertification**

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

[36] The average monthly gas discount applies only to residents of Catalina Island.

[37] The average gas subsidy applies only to residents of Catalina Island.

**Post Enrollment Verification (PEV)**

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

**Information Technology (IT) /Programming**

Covers programming, labor costs for system enhancements, compliance, and process maintenance.

**CHANGES Program**

Includes Cost of CHANGES program as invoiced by ED.

**Measurement and Evaluation**

Includes costs for the Categorical Eligibility study, an evaluation of the CHANGES program, and planning for the 2025 LINA.

**Regulatory Compliance**

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

**General Administration**

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

**Commission Energy Division Staff Funding**

Includes CPUC ED Staff expenditures.

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

| | |
|---|---|
| Electric CARE | $ 112,702,858[38] |

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

SCE does not include CARE-related costs in base rates. According to D.97-08-056, the CPUC directed that SCE's administrative costs related to the CARE program be included in Public Purpose Programs rates. Later, D.02-09-021 required SCE to establish a CARE balancing account for monthly recording purposes, which includes:

- The variance between CARE discounts granted to eligible customers and CARE surcharges billed to non-CARE customers.
- The difference between the authorized amounts for CARE administration and the actual expenses for CARE administration.

[38] *See* A.26-04-002, Energy Resource Recovery Account (ERRA) Review Of Operations 2025, Exhibit SCE-02, p. 63 (April 01, 2026).

- Costs related to the CARE automatic enrollment program.
- Costs related to the ED's audit of SCE's CARE program.

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

| CARE Electric Surcharge and Revenue Collected by Customer Class | | | | | |
|---|---|---|---|---|---|
| **Customer** | **Average Monthly** | | **CARE Surcharge as Percent of Bill** | **Total CARE Surcharge Revenue Collected** | **Percentage of CARE Surcharge Revenue Collected** |
| **Class** | **CARE Surcharge** | **Monthly Bill** | | | |
| Residential | $ 22,239,838 | $ 557,273,907 | 4% | $ 266,878,053 | 27.29% |
| Agricultural | $ 1,732,042 | $ 27,000,777 | 6% | $ 20,784,506 | 2.13% |
| Commercial | $ 49,869,318 | $ 662,274,689 | 8% | $ 598,412,597 | 61.19% |
| Industrial | $ 3,819,934 | $ 38,247,400 | 10% | $ 45,839,212 | 4.69% |
| Public Authority | $ 3,766,827 | $ 46,436,003 | 8% | $ 45,195,684 | 4.62% |
| Railroads | $ 75,773 | $ 1,170,367 | 6% | $ 909,271 | 0.09% |
| Interdepartmental | $ 894 | $ 18,915 | 5% | $ 10,722 | 0.00% |

## 2.4 Marketing, Education and Outreach

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

**General Awareness**

In 2025, SCE supported the CARE program through integrated marketing and outreach efforts designed to sustain customer awareness and engagement and include information on Base Services Charge. CARE messaging was incorporated

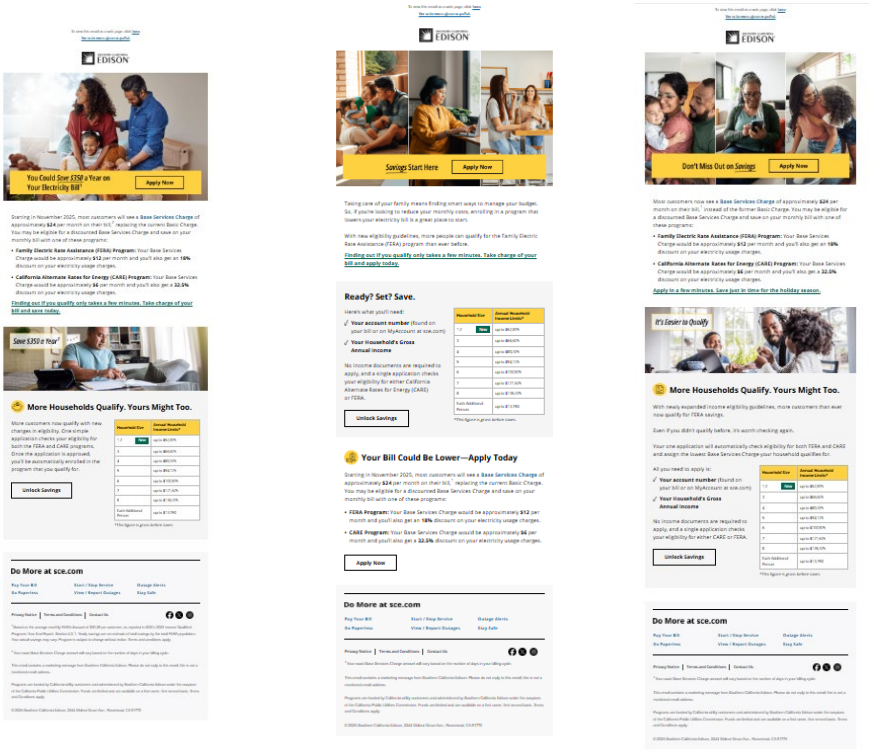
across broader affordability outreach and targeted to customers with a high propensity for CARE eligibility.

Direct Communication Channels: Email Marketing and Direct Mail

In 2025, SCE deployed 3.3 million automated emails targeting high-propensity customers for both CARE and FERA programs. Communications followed a structured cadence from August to December targeting both CARE and FERA audiences.

A refreshed automated email journey launched in August, consisting of three redesigned emails:

1. Introduction Email – Highlighting CARE and FERA program benefits
2. Guidance to Apply Email – Providing pathways to enrollment
3. Reminder Email – Reinforcing benefits and encouraging enrollment




Messaging also incorporated information about the lower BSC, helping customers understand the broader bill-reduction benefits associated with CARE and FERA participation. A new approach in 2025 leveraged Marketing

Technology (MarTech) to identify when customers received their initial BSC notifications. Once the BSC notice was delivered, customers were automatically targeted with the corresponding CARE/FERA communications, ensuring timely, relevant outreach that aligned program awareness with the customer's most recent bill changes. Email open-rate performance was 64%, while sustaining a 5% unique click-to-open rate.

To reach customers without an email address on file, SCE deployed targeted direct mail from March through May (FERA-only) and September through November (CARE + FERA). In 2025, SCE distributed more than 121,000 bilingual mail pieces, including refreshed self-mailers featuring updated creative and messaging. Mailers contained QR codes and URLs directing customers to the CARE/FERA enrollment webpage and included reminders of related assistance programs such as California Lifeline and Internet for All Now.

In June 2025, SCE implemented its annual CARE/FERA solicitation campaign to notify non-participating households of updated CARE and FERA income eligibility guidelines, effective June 1, 2025. The campaign focused on communicating revised income thresholds and eligibility criteria. As part of this effort, SCE distributed approximately 2 million printed application inserts through customer billing statements and delivered approximately 2 million email communications to customers enrolled in paperless billing, consistent with customer communication preferences.

In November, marketing letters with Homekey CARE applications fulfill AB 2672 requirements. Project Homekey is part of California's AB 2672 and seeks to increase housing for those facing or at risk of homelessness. The campaign promoted CARE enrollment to all Homekey awardees in its territory, helping vulnerable groups access energy bill discounts.

In December, direct mail communication was sent to submetered customers and tenants to promote CARE, FERA, and MBL program awareness. A total of 1,277 customer letters and 30,335 tenant letters. The communications informed DMS customers of billing corrections related to CARE, FERA, and/or MBL discounts, detailed the two-phase issuance of retroactive bill credits.

CARE Rate Education Report

In November 2025, SCE identified that it was not utilizing targeted, personalized Rate Education Report (RER) to market to customers with a high likelihood of CARE eligibility, as required. SCE did not provide a tailored digital experience for pre-screened, potentially eligible customers within SCE's online My Account platform. These high-propensity customers continued to receive CARE marketing and outreach solicitations, and existing rate comparison tools have consistently remained available to all customers. However, these tools do not illustrate the potential bill impacts of enrolling in CARE.

SCE has initiated efforts to develop and implement a rate education marketing strategy, including expanded use of propensity-based eligibility data to deliver personalized bill comparisons illustrating the potential CARE discount through customers' preferred communication channels.

SCE.com

Email, direct mail, and digital media collectively drove 297,842 total page visits and 69,473 intent actions to the CARE/FERA enrollment website in 2025 (inclusive of both combined CARE/FERA and FERA specific email/direct mail). These interactions resulted in a 23% intent action rate, which represents the share of visitors who took an action signaling enrollment intent such as starting an application. These actions contributed to 66,046 application starts and 14,339 completed applications.

A new outreach approach helped create connections with households that may not typically engage through digital or traditional outreach channels. Outreach effort included three in-person events in November and December, distributing +1,200 branded tote bags with informational flyers highlighting CARE and FERA benefits. Each event reached an average of 1,400 attendees, allowing ambassadors to speak directly to approximately 1,200 customers about bill-assistance programs.

**Partner Education & Outreach**

Capitation Agencies

The Capitation Fee Program aims to encourage CBOs to collaborate with SCE to assist hard-to-reach customer populations in enrolling in the CARE program. The program reimburses organizations for helping income-qualified customers receive assistance through the program.

The Capitation Fee Program team will be 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. In addition, the Capitation Agency team coordinated with SCE's Community & Climate Equity team to communicate CARE messaging through the SCE network of CBOs as well as in tradeshows and community events throughout SCE's service area. The CBOs are encouraged to apply and become CARE capitation agencies during these community events SCE currently has 60 Capitation Agencies participating in the program. In 2025, Capitation Agencies successfully enrolled 847 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 Faith-Based Organizations (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.

During 2025, SCE hosted a CARE Capitation agency webinar. SCE capitation agencies were informed of SB 1130 as well as the Base Services Charge (BSC). The capitation agencies in turn informed SCE customers of the

new CARE guidelines as well as the BSC when recruiting and enrolling the customers on CARE.

**Community Engagement**

SCE is committed to strengthening outreach and customer communications for IQP programs, with a sustained focus on underserved and linguistically diverse communities. These efforts are coordinated across multiple internal organizations; including Local Public Affairs, Consumer Affairs, Marketing, Corporate Communications, Access and Functional Needs, and Strategic Engagement to ensure messaging is consistent, accessible, and delivered through channels that effectively reach eligible customers and support program participation requirements.

In addition to internal coordination, SCE conducts external outreach by partnering with chambers of commerce, regional centers, food banks, foundations, FBOs, and CBOs to extend program awareness through trusted community networks and increase engagement with hard-to-reach customer segments. To strengthen accountability and reporting quality, SCE has continued enhancing its outreach tracking and reporting approaches, including improved event capture methods and more standardized reporting practices that support consistent documentation of engagement activity.

SCE also expanded cross-collaboration with the Mobile Education Unit (MEU) program to increase in-person, community-based touchpoints and improve access to enrollment support and program education in underserved communities. To augment capacity and broaden coverage, SCE worked with an external outreach agency that supported community event execution and provided recurring monthly activity reporting, which strengthened visibility into event-level engagement and outcomes and helped improve consistency in how results are documented.

In 2025, SCE participated in or hosted more than 196 external engagement activities promoting IQP, engaging approximately 29,000 customers. Of these activities, 73.3% specifically targeted disadvantaged communities.

Other Efforts

In 2025, SCE launched a cost-effective school partnership strategy using the ParentSquare platform to help schools share information about CARE, FERA, and other customer assistance programs with parents and guardians across SCE's service territory. This outreach reached approximately 5,500 schools, generated strong engagement (with over 415 schools requesting program files for distribution), and resulted in continuing invitations for SCE participation in school connected events such as PTSA meetings, community resource fairs, and similar forums—extending program awareness through trusted community channels. As a representative example of the relationships built through this approach, SCE developed a strong partnership with Hawthorne School District, including a presentation to the district's Community Schools team and follow up distribution of program flyers and outreach resources for sharing with families and the broader community.

Press Article Mentions

Media coverage information about IQP programs was shared with several media outlets, including Univision Los Angeles, Telemundo Los Angeles, Univision Palm Springs, NBC Palm Springs, KERO Bakersfield, and the Orange County Register. Coverage discussed the ongoing need for and importance of assistance programs and offered ways to save on energy bills, especially during extreme weather conditions.

Outbound Calls

In 2025, SCE leveraged the Genesys Cloud outbound calling platform as an innovative, scalable outreach tactic to support CARE/FERA customers in meeting ongoing recertification and verification requirements and maintaining program participation. The cloud-based solution enabled automated outbound dialing campaigns from uploaded customer contact lists, routed customers directly to SCE's self-service IVR flow, and provided real-time reporting on contact

attempts and outcomes—reducing reliance on live-agent outreach while expanding reach. As reflected in operational reporting, approximately 75% of outbound calls were consistently transferred to the IVR flow month over month, demonstrating strong customer engagement with the automated self-service experience. This approach strengthened SCE's ability to deliver timely reminders, streamline customer interactions, and improve operational efficiency while helping customers stay informed and compliant with program requirements.

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

**Home Energy Report Total Counts for 2025**

| | |
|---|---|
| Customers enrolled in CARE as of December 31, 2025 | 1,364,107 |
| Number of HER Recipients on a CARE rate | 743,591 |
| Percentage of CARE population that received HERs | 55% |

SCE uses a Randomized Control Trial experimental design model[39] to select customers to receive a HER. In PY 2025, 743,591 CARE customers received HERs. In total, HERs reached approximately 2.4 million customers, 30.8% of those customers were also on CARE. This exceeds the 15% of HERs that should be sent to CARE customers, as mandated by the CPUC.

In May 2025, low-income and bill assistance program information was incorporated into the monthly Home Energy Reports. Featured programs were rotated monthly and included MBL, ESA, AMP, and FERA. Additionally, customers who received monthly digital Home Energy Reports were provided with a printed report on a quarterly basis. The printed version included a Bill Assistance message directing customers to the range of programs available to support bill affordability.

[39] A Randomized Controlled Trial (RCT) is an experimental research design where participants are randomly assigned to groups (treatment or control) to determine the effectiveness of an intervention by comparing outcomes between groups.

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

SCE uses various outreach methods, such as CBOs, events, partnerships with schools and tribal entities, and marketing communications.

The most effective outreach approach combines multiple methods to support CARE awareness, including partnerships with community-based organizations, participation in community events, and coordinated marketing communications. Among these, marketing communications have proven most effective in engaging customers through a multi-channel strategy that includes customer journey emails, direct mail, and paid media. Effectiveness is measured by customer engagement and the number of CARE applications submitted through the sce.com website.

In 2025, SCE implemented a multi-channel marketing strategy with mentions of both CARE and FERA. These channels collectively drove 297,842 page visits to the CARE/FERA enrollment website and generated 69,473 intent actions, defined as customer behaviors signaling interest in enrollment, such as initiating an application. These interactions resulted in an overall intent action rate of 23 percent, demonstrating the effectiveness of integrated marketing communications in motivating customer engagement.

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

Low-income assistance programs have historically faced participation challenges such as limited customer awareness, language, cultural barriers, documentation and eligibility verification requirements, and difficulties reaching highly mobile or under-penetrated populations. However, SCE did not identify material barriers that impeded participation in the CARE Program. Enrollment and penetration levels remained strong and consistently exceeded Commission-approved targets, with CARE achieving a 106 percent penetration rate in 2025. To proactively address these commonly recognized accessibility challenges and

support continued access, SCE implemented several accessibility-focused enhancements during the 2025 reporting year. These efforts included making large-print CARE/FERA applications available online and ensuring that any updates made to the SCE.com CARE/FERA portals remain compliant with Web Content Accessibility Guidelines standards. Additionally, SCE implemented targeted outreach and marketing strategies focused on traditionally hard-to-reach customers. These efforts included multilingual direct-to-consumer and mass-media outreach, with print and digital advertising in Spanish and select Asian languages, as well as CARE marketing materials and customer communications tailored to diverse communities and under-represented geographic areas. These efforts supported sustained enrollment momentum and program accessibility, and no barriers were identified that adversely affected CARE participation or the achievement of program objectives.

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

SCE consistently shares CARE-related enrollment data with other utilities operating in overlapping service territories and with applicable water districts, in accordance with the requirements set forth in D.11-05-020. These data exchanges support coordinated administration of low-income programs, reduce duplicative outreach, and facilitate timely enrollment of eligible customers.

CARE eligibility data are submitted through a secure interface that safeguards customer information and ensures data integrity. Once data are received, SCE's systems automatically validate and match the records against existing CARE enrollments. If a customer record does not align with a current enrollment, SCE's system initiates the creation of a new CARE enrollment in accordance with approved program rules and data-sharing protocols. This process supports efficient enrollment while maintaining appropriate controls over data access and use. SCE conducts data exchanges on both a monthly and quarterly basis, depending on the counterparty and program alignment. Monthly exchanges

occur between investor-owned utilities (IOUs), specifically Southern California Gas Company (SoCalGas) and SCE, as well as across internal low-income programs, including transfers from the ESA program to CARE and from the Low Income Home Energy Assistance Program (LIHEAP) to CARE. Quarterly exchanges are conducted with Southwest Gas and Pacific Gas and Electric Company (PG&E), CPUC-regulated water agencies, and non-CPUC-regulated water agencies, such as the Eastern Municipal Water District (EMWD). Collectively, these exchanges support consistent application of CARE eligibility and coordinated program administration across utilities. In 2025, SCE further expanded its data-sharing framework by onboarding a new non-regulated water agency, Ventura Water, enhancing coordination in overlapping service areas and strengthening support for CARE enrollment through inter-utility data exchanges.

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

SCE supports coordinated administration of its low-income programs through the sharing of CARE customer data and other relevant program information across internal program areas, including the ESA Program and other qualifying assistance programs. These data-sharing practices are intended to improve operational efficiency and reduce duplicative customer requirements.

As part of ESA program delivery, ESA contractors inform customers about the CARE and FERA rate discount programs and respond to questions regarding eligibility and participation. When a customer requests enrollment in CARE or FERA during an ESA interaction, the request is captured through the ESA enrollment process and transmitted to the CARE program for enrollment at the applicable discounted rate. Information sharing also occurs in the reverse direction; when a customer enrolls directly in CARE, enrollment information is shared with the ESA program to support identification of potential ESA participation opportunities.

Beginning in 2025, SCE enhanced cross-program coordination by allowing income information collected through the ESA Program to satisfy CARE PEV requirements for customers already receiving the CARE discount. This approach streamlined ongoing eligibility management by eliminating the need for duplicative income documentation. SCE plans to extend this practice to FERA customers in 2026. Additionally, SCE plans to establish a coordination process in which CARE will notify the ESA program when a customer successfully completes income documentation through the PEV process, enabling exemption from duplicative income re-verification for ESA eligibility.

SCE continues to coordinate CARE enrollment with other low-income assistance programs. Customers enrolled through the Low-Income Home Energy Assistance Program (LIHEAP) are automatically enrolled in CARE and receive information regarding the MBL Program, where applicable. SCE's Arrearage Management Plan (AMP) utilizes CARE enrollment data to support targeted outreach and assistance for CARE customers with outstanding balances. Collectively, these coordination and data-sharing practices support a more seamless customer experience and efficient program administration.

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

SCE leverages the Capitation Fee Project to collaborate with service providers involved in relevant low-income programs, offering personalized assistance to reach SCE's most challenging customer demographic. Throughout 2025 SCE maintained partnerships with its agencies, facilitating the distribution of electronic versions of assistance materials to provide optimal support.

In 2025, SCE worked with 60 Capitation agencies, collectively, the agencies enrolled 847 customers into the CARE program.

Additionally, the CARE team coordinates with SCE's Community & Climate Equity team to communicate CARE messaging through the SCE network of CBOs as well as in tradeshows and community events throughout SCE's

service area. The CBOs are encouraged to apply and become CARE capitation agencies during these community events. On a quarterly basis, SCE furnishes updated messaging to CBOs. The CBOs are encouraged to distribute across their respective networks via email and social media channels.

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

The IQP Load Disaggregation Report supports the requirements and objectives of AB 793 and is intended to benefit SCE's income-qualified customers, including CARE and FERA participants. This project supports the development and availability of end use and electric usage profiles that enhance customer education and enable targeted outreach.

The IQP Load Disaggregation Report was launched in 2024 to provide income-qualified customers with personalized insights into household electricity usage by end use, consistent with CPUC requirements. Phase 1 of the project included report generation and delivery to customers via email, allowing customers to better understand their energy usage patterns and identify potential opportunities for energy savings.

In early 2025, SCE implemented Phase 2 of the IQP Load Disaggregation project, expanding customer access by enabling reports to be downloaded directly through SCE.com My Account within the Data Sharing and Download section. This enhancement improved transparency, self-service access, and ease of retrieval. Updated customer communications and welcome letters were deployed to increase awareness of this capability among income-qualified customers.

Ongoing enhancements to the IQP Load Disaggregation project include expanded digital self-service access and coordination with CCC teams to address customer inquiries and escalations related to report access and usability.

For PY 2025, SCE incurred costs totaling $805,013.20 for the IQP Load Disaggregation Report contract. These costs are tracked by the CARE and ESA balancing accounts to support AB 793 requirements. In addition, -DR program information supported by AB 793-related data was incorporated into ESA in-home energy education efforts. Costs associated with leave-behind materials, including flyers and enrollment pamphlets, were funded and tracked under the applicable DR programs.

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

In 2025, SCE coordinated with the CSD to support cross-referral of low-income customers between CARE and the Low-Income Home Energy Assistance Program (LIHEAP), consistent with Commission-approved data-sharing directives.

As part of this coordination, SCE conducted informational outreach with CSD's Local Service Providers (LSPs), which are community-based organizations that assist customers applying for LIHEAP. SCE facilitated a webinar for LSPs that provided an overview of the CARE program, including eligibility requirements, the CARE online application process, and information related to the Basic Service Charge. This outreach supported LSPs' ability to share accurate CARE program information with eligible customers and assist them during the LIHEAP application process.

During these outreach efforts, LSPs were encouraged to provide CARE program information to their constituents and, where appropriate, assist customers with completing the CARE online application. To support this assistance, SCE provided LSPs with a toll-free telephone number that connects directly to dedicated SCE representatives who can respond to CARE-related inquiries and provide application support as needed.

In addition to outreach and education, throughout 2025, SCE maintained an operational cross-referral process for customers receiving LIHEAP assistance. On a monthly basis, customers who received a LIHEAP payment pledge through CSD's LSPs were automatically enrolled in the CARE program, if not already enrolled. This process supported timely access to CARE benefits for income-qualified customers and reduced the need for duplicative customer action.

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

SCE continued to implement targeted operational improvements to enhance the cost-effectiveness, efficiency, and consistency of CARE program administration, while supporting sustained outreach and enrollment among eligible, non-participating households.

To strengthen program delivery and internal controls, SCE implements a structured correction and monitoring framework for CARE/FERA operations. Under this framework, identified items are tracked to resolution with documented corrective actions and supervisory oversight. Controls include periodic spot checks, with secondary review by supervisors to reinforce accountability and consistency. This process was formalized within CARE/FERA program policies and procedures and supports more efficient issue resolution while reducing the need for repeated corrective effort.

SCE is further strengthening billing accuracy and program integrity by implementing enhanced system controls to prevent duplicate CARE and FERA discounts and to improve account transfer handling through SCE.com. IT impact assessments and implementation planning for these enhancements were completed in early 2025, with project completion expected in Q3 2026. These controls will reduce downstream corrective actions, support consistent application of discounts, and enhance overall customer experience without increasing administrative burden.

In parallel, SCE maintained enhanced program reporting capabilities to support verification and recertification oversight. These reporting enhancements enable ongoing monitoring of enrollment and recertification outcomes, trend analysis, and timely management response.

With respect to outreach and enrollment of non-participating eligible households, SCE continued to leverage centralized, data-driven outreach methods implemented internally rather than through third-party contractors. These efforts focused on targeted customer communications and system-enabled outreach aligned with eligibility triggers and program touchpoints. While formal quantitative cost-effectiveness assessments were not conducted for each discrete enhancement, these initiatives were designed to improve operational efficiency, reduce rework, and support sustained enrollment outcomes through scalable and repeatable processes.

### 2.4.10 Low CARE Enrollment Rate Zip Codes: Identify the low CARE enrollment zip codes, including the names of the cities, and discuss the strategies that were effective or not effective in targeting and enrolling these hard-to-reach households. Include the IOU's corrective action plans and ME&O strategies to maintain and bolster enrollment in these zip codes.

SCE identified several ZIP codes with comparatively low CARE enrollment rates, primarily located in rural, seasonal, or higher-income service areas where the eligible CARE population is smaller or more difficult to reach.

These ZIP codes are listed in the table below.

| Low CARE Penetration Rate Zip Codes | City | County |
|---|---|---|
| 93634 | Lakeshore | Fresno County |
| 93664 | Shaver Lake | Fresno County |
| 93208 | Cantua Creek | Fresno County |
| 92266 | Palo Verde | Imperial County |
| 93529 | June Lake | Mono County |
| 92662 | Newport Coast | Orange County |
| 92617 | Irvine | Orange County |
| 93226 | Hollister | Kern County |
| 92267 | Parker Dam | San Bernardino County |
| 93108 | Montecito | Santa Barbara County |

During the reporting year, SCE consistently exceeded its overall CARE penetration targets early in the year. As a result, SCE strategically applied a data-driven targeting approach leveraging a CARE propensity score. Using the CARE propensity score allows prioritization of customers with a higher likelihood of enrollment. While mass direct mail has historically been effective in driving enrollment at scale, it was less effective in certain low-penetration ZIP codes due to factors such as lower residential density, language barriers, and limited engagement with traditional marketing channels. Through direct response efforts, SCE outreach used CARE propensity scores to identify households most likely to enroll for CARE. While outreach was not uniform across all identified ZIP codes, SCE's efforts reached customers based on individual-level propensity data.

Looking ahead to 2026, SCE plans to maintain and bolster CARE enrollment by continuing to monitor penetration trends, applying preferential targeting where appropriate, and adjusting outreach channels based on customer engagement. SCE plans to continue using the CARE propensity score to guide outreach prioritization, while also identifying customers in identified under-penetrated ZIP codes. The table below identifies under-penetrated service areas as of December 31, 2025, which will remain a key area of emphasis for

SCE's outreach efforts in the coming year. Outreach strategies may include a mix of customer journey emails, targeted direct mail, digital outreach, and in-person community engagement, coordinated with other active low-income customer communications and supported through community events and school partnerships.

| County Name | Pen Rate as of December 31, 2025 (less than 90%) |
|---|---|
| Fresno | 6% |
| Fresno | 6% |
| Imperial | 12% |
| Inyo | 60% |
| Kern | 84% |
| Mono | 33% |
| Santa Barbara | 53% |

## 2.5 Processing CARE Applications

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

As discussed in Section 2.1.7, DMS CARE/FERA recertification activities had not been reinstated following the conclusion of the COVID-19 moratorium on August 26, 2021. In May 2025, SCE resumed auto-recertification process for sub-metered CARE customers.

Moving forward, SCE directly contacts enrolled tenants to initiate recertification. Recertification requests are issued through the customer's preferred communication channel to ensure timely awareness and response. To further facilitate successful recertification, SCE provides multiple advance notices, prior to the recertification deadline. Customers may complete the recertification process via mail, phone, or online. Failure to complete recertification by the established deadline results in automatic de-enrollment from the CARE program, and the customer is transitioned to their Otherwise Applicable Tariff.

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

SCE does not employ any third parties to conduct enrollment, recertification, or verification on its behalf. All CARE enrollment, recertification, and verification activities are administered through SCE's internal processes and supported by SCE-led processing operations.

SCE does contract with third parties under the Capitation Fee Project, approved by the CPUC in D.01-05-033, to extend SCE's outreach efforts. This program facilitates CARE enrollment for eligible low-income customers at the point of service through trusted organizations. SCE partners with CBOs, private entities, and Women, Minority, Disabled Veteran, or Business Enterprise (WMDVBE) contractors, as reflected in CARE Table 7, and pays a $30 capitation fee per newly enrolled customer to offset enrollment assistance costs. These entities support enrollment only and do not perform eligibility determinations, recertification, or income verification, which remain under SCE's control.

Enrollments generated through the Capitation Fee Project have been significantly lower than those achieved through SCE's direct acquisition and outreach efforts. In 2025, SCE's internal, data-driven outreach was substantially more effective in reaching hard-to-reach and under-served customer segments. While the capitation model may be cost-effective on a per-enrollment basis, its overall contribution to total enrollments has been modest. SCE is evaluating opportunities to revitalize the program and explore potential future roles for these partners in supporting recertification and verification-related outreach, while maintaining SCE's responsibility for eligibility determinations and compliance oversight.

## 2.6 Program Management

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

In 2025, CARE program administration was impacted by extended verification timelines, verification threshold limitations, and temporary recertification and verification exemptions implemented under EPOs, including related implementation considerations, as discussed in Section 2.2.3. SCE also identified issues affecting CARE and FERA administration for DMS accounts, including discrepancies among eligible dwelling units, applicable allowances, and billed credits; related issues and remediation efforts are discussed in Section 2.1.7.

Collectively, these events required SCE to balance compliance with emergency-related regulatory directives and corrective actions with ongoing program management responsibilities. In response, SCE enhanced monitoring of enrollment trends and verification activity and implemented additional controls to support the orderly resumption of standard verification and recertification processes as regulatory conditions permitted.

In November 2025, SCE also implemented the residential Base Services Charge (BSC) pursuant to AB 205 and D.24-05-028. Under the Commission-approved structure, CARE customers receive a discounted BSC of approximately $6 per month, compared to approximately $12 per month for FERA customers and $24 per month for non-income-qualified residential customers.[40] To support implementation, SCE conducted targeted customer education and internal readiness activities, including customer communications, billing explanation updates, and training for customer service and program staff.

To further improve transparency and customer understanding of eligibility and verification requirements, SCE established a vendor contract in 2025 to support the development of AI-assisted educational tutorials. Instructional content is under development for implementation in 2026 to support customer

[40] Resolution E-5356, p. 5.

comprehension and successful completion of CARE and FERA eligibility and verification processes.

Overall, these actions enabled SCE to address significant operational and regulatory developments, maintain continuity of service for vulnerable customers, and administer the CARE program in alignment with authorized budgets and applicable regulatory requirements.

## 2.7 Pilots

There are no active pilots for the CARE Program in PY 2025.

## 2.8 Studies

There are no active studies for the CARE Program in PY 2025.

## 2.9 CARE Working Groups and Sub-working Groups (SWG)

### 2.9.1 Identify recommendations provided by the working group to improve program performance that were adopted by the IOU.

The CARE/FERA/PEV Statewide Working Group concluded its work in 2023 and issued recommendations to improve program performance, several of which were adopted by the IOUs and continued or advanced in 2025. A central focus of these recommendations was reducing avoidable disenrollment by strengthening customer notification practices and promoting greater consistency across program administrators. Non-response to Program Eligibility Verification and recertification notices was identified as a primary driver of CARE and FERA disenrollment, with mitigation strategies emphasizing enhanced outreach, automation, and standardized communications.

Consistent with this statewide direction, SCE continued implementing the Genesis outbound communications platform to deliver automated PEV and recertification reminders and maintained a defined communication cadence consistent with regulatory notice requirements.

To reduce administrative burden and avoid duplicative verification, SCE continued coordination across income-qualified programs. CARE customers

participating in the Low-Income Home Energy Assistance Program (LIHEAP) remained exempt from PEV. The IOUs also maintained enhanced program reporting to monitor verification and recertification outcomes. In 2025, SCE continued to report on recertification and verification activities, including PEV re-enrollment rates, as reflected in the CARE Annual Report tables. In addition, the IOUs sustained regular joint utility coordination meetings to share best practices, with SCE remaining an active participant.

## 2.10 Miscellaneous

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

In 2025, SCE maintained active and ongoing coordination with the California Emerging Technology Fund (CETF) in support of affordable broadband ME&O, consistent with the Joint Stipulation objectives. Internet for All and California Lifeline were incorporated into the CARE/FERA direct mail marketing journey, with 179,559 mailers distributed in 2025. SCE operationalized this collaboration through regular meetings and information exchanges with CETF and by integrating CETF-developed “Internet for All” messaging into existing CARE, FERA, and ESA outreach channels, as permitted under the Joint Stipulation.

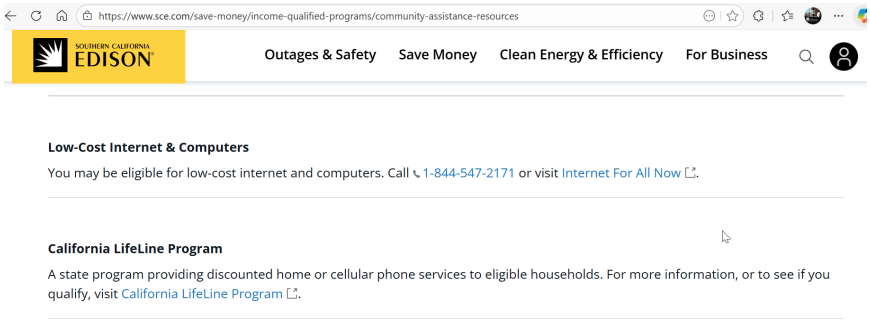
Consistent with CETF guidance, SCE integrated the CETF website link and dedicated phone numbers into SCE CARE/FERA website, refreshed and deployed approved CETF flyers and call scripts, incorporated updated CETF collateral into ESA customer education booklets, and coordinated internally to ensure all customer-facing communications reflected the correct CETF website link, dedicated phone number, and call routing. These updates ensured accurate referral of customers to CETF for broadband eligibility questions and enrollment assistance.

SCE further supported CETF engagement by sharing “Internet for All” information through contractor and partner forums and by providing CETF materials for distribution during community-based outreach. This included

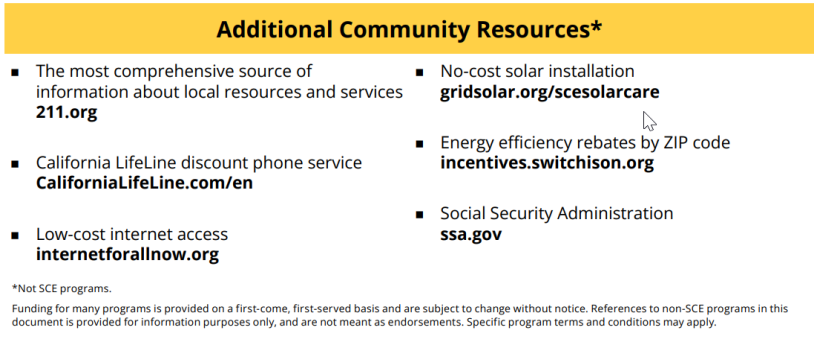
making CETF-funded materials available to CBOs to support local dissemination, consistent with Joint Stipulation provisions related to CBO education and outreach.

The year concluded with a year-end coordination meeting with CETF to review activities and close out annual reporting. As part of this process, SCE provided CETF with the total count of 1,117,295 CARE and FERA customers with email addresses, supporting CETF's outreach planning and fulfilling Joint Stipulation requirements for annual coordination and reporting. These efforts positioned SCE and CETF to maintain momentum and continue collaborative affordable broadband education and outreach in subsequent program years.

**SCE Website Link**




**Magnified Section of Community Resource Guide**




**Magnified Section of Direct Mail Piece**

## You may qualify for a discounted Base Services Charge and SAVE on your electricity costs EVERY month.

Starting in November 2025, most customers will see a **Base Services Charge** of approximately **$24** per month on their bill[1], replacing the current Basic Charge. You may be eligible for a discounted Base Services Charge and save on your monthly bill with one of these programs:

**Family Electric Rate Assistance (FERA) Program:** Your Base Services Charge would be approximately **$12** per month and you'll also get an **18% discount** on your electricity usage charges.

**California Alternate Rates for Energy (CARE) Program:** Your Base Services Charge would be approximately **$6** per month and you'll also get a **32.5% discount** on your electricity usage charges.

**Apply today at sce.com/carefera. It takes just minutes to see which program you may qualify for to save on your bill every month.**

### Other Ways to Save

**Internet For All Now**
Need affordable internet? Learn more about low-cost internet plans.
**internetforallnow.org**

**California Lifeline**
Receive discounted home and cell phone services.
**californialifeline.com**

[1] Based on the average monthly FERA discount of $330.28 per customer, as reported in SCE's 2023 Income Qualified Programs Year-End Report, Section 4.2.1. Yearly savings are an estimate of total savings by the total FERA population. Your actual savings may vary. Program is subject to change without notice. Terms and conditions apply.

[2] Your exact Base Services Charge amount will vary based on the number of days in your billing cycle.

SCE is not affiliated with Internet For All Now or California Lifeline and provides these community assistance resources for informational purposes only.

## More Households Qualify. Yours Might Too.

More customers now qualify with new changes in eligibility. One simple application checks your eligibility for both the FERA and CARE programs. Once the application is approved, you'll be automatically enrolled in the program that you qualify for.

**Effective 6/1/25 - 5/31/26.**

| Household Size | FERA Annual Household Income Limits* |
|---|---|
| 1 – 2 New | up to $52,875 |
| 3 | up to $66,625 |
| 4 | up to $80,375 |
| 5 | up to $94,125 |
| 6 | up to $107,875 |
| 7 | up to $121,625 |
| 8 | up to $135,375 |
| Each Additional Person | up to $13,750 |

**This figure is gross before taxes.*



## Es posible que califiques para un descuento en el Cargo por Servicios Base y un ahorro mensual en tu costo de electricidad.

A partir de noviembre de 2025, la mayoría de los clientes encontrarán un Cargo por Servicios Base de aproximadamente $24 al mes en sus facturas[1], en sustitución del cargo básico actual. Podrías ser elegible a obtener un descuento en el Cargo por Servicios Base y ahorrar en tu factura mensual con uno de estos programas:

**Programa Family Electric Rate Assistance o FERA** (Programa familiar de reducción de las tarifas de energía): Tu Cargo por Servicios Base sería aproximadamente **$12** al mes y también recibirás un **descuento de 18%** en tus cargos por consumo de electricidad.

**Programa California Alternate Rates for Energy o CARE** (Tarifas alternativas de energía para California)**:** Tu Cargo por Servicios Base sería aproximadamente **$6** al mes y también recibirás un **descuento del 32.5%** en tus cargos por consumo de electricidad.

**Presenta tu solicitud hoy mismo sce.com/es/carefera. Te tomará solo unos minutos. Verifica tu elegibilidad y toma el control de tus facturas.**

### Más formas de ahorrar

**Internet For All Now**
¿Buscas internet accesible? Obtén más información sobre planes de bajo costo.
**internetforallnow.org**

**California Lifeline**
Recibe descuentos en servicios de teléfono residencial y teléfono móvil.
**californialifeline.com**

[1] Basado en el descuento mensual promedio de FERA de $30.28 por cliente, según reportado en el Informe de fin de año de los programas calificados por ingresos de 2023 de SCE, Sección 4.2.1. Los ahorros

## Más hogares califican. El tuyo también podría.

Ahora, más clientes califican gracias a los nuevos cambios en la elegibilidad. Una simple solicitud verifica tu elegibilidad a los programas FERA y CARE. Cuando la solicitud este aprobada, estarás automáticamente inscrito al programa que califiques.

**Effective 6/1/25 - 5/31/26.**

| Tamaño del hogar | Límites de ingresos anuales del hogar para FERA* |
|---|---|
| 1 – 2 Nuevo | hasta $52,875 |
| 3 | hasta $66,625 |
| 4 | hasta $80,375 |
| 5 | hasta $94,125 |
| 6 | hasta $107,875 |
| 7 | hasta $121,625 |
| 8 | hasta $135,375 |
| Cada persona adicional | hasta $13,750 |

**Esta cifra es bruta antes de impuestos.*

## 3. CARE EXPANSION PROGRAM

The CARE Expansion Program provides a monthly energy bill discount to qualifying nonprofit, group-living facilities that serve low-income and special-needs populations. Eligible facilities include, but are not limited to, nonprofit group-living facilities, Migrant Farmworker Housing, and Agricultural Employee Housing that meet CARE program requirements.[41] To qualify, a facility must be owned and operated by a nonprofit organization that is exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code. At least 70 percent of the energy consumed at the facility must be attributable to residential use, reflecting its primary function as housing rather than commercial or administrative operations.

In addition, eligible facilities must provide lodging in conjunction with a special-needs or supportive social service—such as meal services, rehabilitation, counseling, or other assistance—and all residents served by the facility must meet CARE income-eligibility requirements. Migrant Farmworker Housing and Agricultural Employee Housing must similarly serve income-qualified residents and operate primarily as residential facilities. For homeless shelters, hospices, and women's shelters, eligibility is further conditioned on the facility having a minimum of six beds, operating for at least 180 days per year, and providing lodging as the primary service. For-profit facilities, as well as facilities that are owned, operated, or subsidized by government entities, are not eligible to participate in the CARE Expansion Program.

### 3.1 Participant Information

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

| 2025 | Commercial[42] | | Residential | |
|---|---|---|---|---|
| Month | Electric | Gas | Electric | Gas |
| Jan | 133 | NA | 362 | NA |
| Feb | 132 | NA | 357 | NA |
| Mar | 134 | NA | 358 | NA |

[41] For PY 2025, SCE did not have any active participants enrolled under the Migrant Farmworker Housing, Agricultural Employee Housing, or Homekey CARE ELI categories.

[42] Discount applies to both commercial and residential facilities if they meet the CARE Expansion qualifications. See D.94-12-049.

| | | | | |
|---|---|---|---|---|
| Apr | 135 | NA | 368 | NA |
| May | 146 | NA | 373 | NA |
| Jun | 146 | NA | 372 | NA |
| Jul | 146 | NA | 371 | NA |
| Aug | 145 | NA | 372 | NA |
| Sep | 145 | NA | 382 | NA |
| Oct | 145 | NA | 381 | NA |
| Nov | 146 | NA | 383 | NA |
| Dec | 147 | NA | 385 | NA |

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

| Facility Type | Electric | Gas |
|---|---|---|
| **Commercial** | 7,723 | NA |
| **Residential** | 4,378 | NA |

## 3.2 Usage Information

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

| Commodity | Electric (kWh) | Gas |
|---|---|---|
| **Commercial** | 9,544 | NA |
| **Residential** | 846 | NA |

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

## 3.3 Program Cost

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

Administrative costs for CARE's Expansion Program are not tracked separately and are included with the overall CARE budget and expenditures.

### 3.3.2 Discount Information

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

| | |
|---|---|
| **Residential Facility Gas Discount** | N/A |
| **Residential Facility Electric Discount** | $1,200 |

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

| | |
|---|---|
| **Commercial Facility Gas Discount** | N/A |
| **Commercial Facility Electric Discount** | $2,499 |

## 3.4 Outreach

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

SCE did not utilize third-party entities to conduct outreach activities on its behalf for the CARE Expansion Program. All outreach activities in 2025 were conducted directly by SCE. In 2025, SCE undertook targeted, utility-led outreach to engage Homekey awardees to raise awareness of available bill-assistance options and facilitate CARE enrollment. As part of this effort, SCE issued a direct mailer to all 76 Homekey awardees describing the CARE program. The outreach emphasized that Homekey awardees may qualify for CARE through a streamlined application process that does not require income documentation and can be completed in just a few minutes. Awardees were encouraged to review the

application materials and access additional information and assistance through SCE's CARE website at sce.com/care.

In 2025, eligible nonprofit group-living facilities could access CARE information through the sce.com/care website, as referenced in SCE's outreach and informational materials.

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

For nonprofit group-living facilities, direct email outreach have proven to be the most effective methods for promoting program awareness and enrollment. These channels allow SCE to communicate directly with facility administrators and authorized representatives who are responsible for managing utility accounts on behalf of residents. Email is particularly effective when paired with online enrollment tools, as it enables recipients to access program information and submit applications electronically at their convenience, while paper mail ensures continued reach to facilities with limited digital access. Outreach effectiveness is measured by tracking key performance indicators, including the volume of completed enrollments received, application response rates, and successful processing of submitted applications attributable to each outreach channel.

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

At this time, SCE's data-sharing activities with other utilities is limited to information related to enrolled CARE participants. SCE does not exchange facility-level information associated with CARE Expansion Program–eligible nonprofit or group-living facilities. Information shared for inter-utility coordination purposes is limited to participant enrollment status and related customer identifiers, consistent with applicable data-privacy requirements and program administration protocols.

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

During the prior year, SCE did not identify material barriers to participation in the CARE Expansion Program. Participation levels indicate that eligible customers are able to access the program effectively, and no systemic impediments to enrollment or ongoing participation were observed or reported. SCE continues to monitor participation trends and customer feedback to ensure continued accessibility and to identify any emerging barriers that may require additional mitigation measures.

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

SCE continued to improve the cost-effectiveness, application processing, and delivery of the CARE Expansion Program by leveraging existing CARE infrastructure and standardized processes. This approach minimized incremental administrative costs while ensuring consistent access for eligible nonprofit group-living facilities.

CARE Expansion participants continued to be served through centralized CARE enrollment systems and workflows, reducing manual processing and avoiding duplicative systems. When Homekey facilities were implemented as an eligible CARE Expansion category, SCE utilized the same enrollment and reporting processes applied to other nonprofit group-living facilities, supporting consistent implementation and oversight without establishing separate administrative or reporting requirements.

Outreach to non-participating facilities relied on utility-led efforts using existing CARE channels, including references to the sce.com/care website in outreach collateral and informational materials distributed through events and

engagement activities. While no separate cost-effectiveness assessment was conducted specifically for CARE Expansion outreach in 2025, SCE's use of standardized platforms and internal resources reflects a cost-conscious approach to supporting enrollment, with program performance monitored through established CARE reporting processes.

## 3.5 Program Management

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

SCE implemented targeted program management initiatives to address two significant developments affecting CARE Expansion program administration: the integration of Homekey housing into CARE eligibility and the resumption of CARE Expansion recertification activities pursuant to Commission direction.

Effective June 1, 2025, SCE formally recognized eligible housing funded through the State of California's Homekey initiative as participants in the CARE program, consistent with statutory expansion of CARE eligibility to residents of permanent supportive housing. Under this expansion, Homekey facilities may qualify for CARE discounted rates where they are owned or administered by public housing authorities or nonprofit entities and where residents substantially meet applicable CARE income eligibility requirements. Incorporating Homekey into the CARE program required coordinated policy alignment, operational planning, and customer-support readiness to ensure consistent implementation while maintaining program integrity.

To address the operational impacts of this eligibility expansion, SCE applied its existing CARE Expansion Program framework for Non-Profit Group Living facilities. Leveraging this established framework enabled SCE to integrate Homekey properties into existing enrollment, verification, and compliance processes while accounting for operational characteristics common to supportive housing environments, including shared or master-metered utility accounts and centralized account management. Eligibility is established at the facility level through submission of required documentation, including verification of nonprofit

or governmental ownership or administration, confirmation of a Homekey award, and attestations regarding residential energy usage and compliance with CARE income eligibility thresholds. This approach reduced administrative complexity and supported consistent application of CARE eligibility standards.

As part of implementation, SCE developed a dedicated application form aligned with nonprofit group-living requirements and made it readily available on SCE's website to facilitate enrollment. SCE also undertook internal readiness activities, including informing call center representatives and processing teams of the expanded eligibility and application process, to ensure customer-facing staff were prepared to address inquiries and provide appropriate support. Beginning in 2026, SCE will initiate and continue coordination with housing authorities, property managers, and nonprofit service providers to facilitate enrollment, address operational questions, and support ongoing compliance for Homekey facilities.

Separately, SCE continued to manage recertification activities for CARE Expansion participants in accordance with Commission direction. All CARE Expansion participants were recertified in 2020 and 2021. Following the Commission's decision in D.21-06-015 to extend the CARE Expansion Program from a two-year to a four-year cycle, SCE resumed recertification of CARE Expansion customers in 2024 and will continue issuing recertification notices as customers become due. These recertification efforts support ongoing eligibility verification and ensure continued compliance with CARE program requirements for Expansion participants, including eligible Homekey facilities.

# FAMILY ELECTRIC RATE ASSISTANCE ANNUAL REPORT

## 4. FERA PROGRAM EXECUTIVE SUMMARY

In compliance with California Senate Bill 1130, SCE filed its FERA Annual Report on March 2, 2026. In the FERA Annual Report, SCE noted that the completed FERA tables would be available in the Low-Income Annual Report to be filed in May. As such, SCE includes the tables with the detailed FERA data as attachments to this Annual Report. SCE has also included some references to FERA in this report, where the context required it because FERA activities were undertaken along with CARE program activities. Please refer to SCE's FERA Annual Report for more information about SCE's 2024 FERA program specifically.

# 5. FUND SHIFTING

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

During 2025, SCE shifted ESA funds within the rules laid out in Section 10.5.8.2 of D.21-06-015. Fund shifting activities were as follows:

- $7,726,386 from prior year committed funds to ESA EE measures and Inspections
- $881,176 shifted from EE to General Admin
- $843,676 shifted from Marketing to Training Center, General Admin, Regulatory Compliance, and CPUC ED
- $5,796,410 unspent carry forward to 2026 for MFWB
- $29,799 unspent carry forward to 2026 for SPOC
- $1,269,918 unspent carry forward to 2026 for Pilot Plus and Pilot Deep
- $1,374,314 unspent carry forward to 2026 for CEH Pilot

**PY 2025 Committed Funds**

SCE utilized the full 2025 authorized budget and no longer has any remaining funds from the current year to commit to work that has not been completed.

**Update on Prior Committed Funds**

SCE utilized $7,726,386 of prior years committed funds on installation jobs that were completed in 2025.

| | Total Commitments |
|---|---|
| Installations | $ 7,078,824 |
| Inspections | $ 647,562 |
| Total | $ 7,726,386 |

Energy savings from completed installations are reported in the year the project is completed. Although some project costs were funded using committed funds from prior

program years, the associated savings are reflected in the same PY in which the budget is expensed.[43]

| | Savings from 2025 Authorized Budget | Savings from Prior Year Committed funds | Total Energy Savings |
|---|---|---|---|
| **kWh** | 18,778,077 | 1,919,662 | 20,697,740 |
| **kW** | 2,951 | 348 | 3,299 |
| **Therms** | (30,057) | 108,252 | 78,195 |

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

During 2025, SCE shifted CARE funds within the rules laid out in Section 10.5.8.2 of D.21-06-015. SCE shifted a total of $1,426,029 from the Outreach category to the following categories:

| | |
|---|---|
| Post Enrollment Verification | $ 322,132 |
| Measurement & Evaluation | $ 39,091 |
| Regulatory Compliance | $ 37,280 |
| General Administration | $ 963,933 |
| CPUC Energy Division | $ 63,593 |
| Total | $ 1,426,029 |

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

There was no ESA, CARE, or FERA program fund shifting activity that occurred in 2025 that fell outside of the fund shifting guidelines in Section 10.5.8.2 of D.21-06-015.

[43] EE Manual, D.12-11-015, p. 92.

## 6. COMMONLY USED ACRONYMS

| ACRONYM | TERM |
|---|---|
| **ACS** | American Community Survey |
| **ADA** | Americans with Disabilities Act |
| **AL** | Advice Letter |
| **AMI** | Advanced Metering Infrastructure |
| **AMP** | Arrearage Management Plan |
| **ASL** | American Sign Language |
| **AWHI** | Advanced Water Heating Initiative |
| **BE** | Building Electrification |
| **BSC** | Base Services Charge |
| **BUILD** | Building Initiative for Low Emissions Development |
| **CAB** | Consumer Affairs Branch |
| **CAM** | Common Area Measures |
| **CARE** | California Alternate Rates for Energy |
| **CBO** | Community-Based Organization |
| **CCC** | Customer Contact Center |
| **CEDARS** | California Energy Data and Reporting System |
| **CEH** | Clean Energy Homes |
| **CETF** | California Emerging Technology Fund |
| **CHANGES** | Community Help and Awareness with Natural Gas and Electricity Services |
| **CMHP** | Comprehensive Manufactured Home Program |
| **CPA** | Cost Per Action |
| **CPLPV** | Cost Per Landing Page Visit |
| **CPM** | Cost Per Thousand |
| **CPUC** | California Public Utilities Commission |
| **CRG** | Community Resource Guide |
| **CSD** | California Department of Community Services & Development |

| ACRONYM | TERM |
|---|---|
| **CTR** | Click-through rate |
| **CWR** | Career & Workforce Readiness |
| **D.** | Decision |
| **DAC** | Disadvantage Communities |
| **DAC-SASH** | Disadvantaged Community – Single-family Solar Homes |
| **DMS** | Domestic Master-Meter Service |
| **DR** | Demand Response |
| **ED** | Energy Division |
| **EE** | Energy Efficiency |
| **EEC** | Energy Education Center |
| **EER** | Energy Efficiency Resources, Inc |
| **EM&V** | Evaluation, Measurement, and Verification |
| **EMAPS** | Energy Management Assistance Partnership System |
| **EMWD** | Eastern Municipal Water District |
| **EPO** | Emergency Protection Order |
| **ESA** | Energy Savings Assistance |
| **ESA WG** | Energy Savings Assistance Working Group |
| **ESA WH** | Energy Savings Assistance Whole Home |
| **ESACET** | Energy Savings Assistance Cost Effectiveness Test |
| **ESAPAM** | Energy Savings Assistance Program Adjustment Mechanism |
| **EUI** | Energy Use Intensity |
| **FBO** | Faith-Based Organization |
| **FERA** | Family Electric Rate Assistance |
| **FPG** | Federal Poverty Guidelines |
| **GHG** | Greenhouse Gas |
| **HCS** | Health, Comfort, and Safety |
| **HER** | Home Energy Report |

| ACRONYM | TERM |
|---|---|
| **HHS** | Health And Human Services |
| **HIPAA** | Health Insurance Portability and Accountability Act |
| **HPWH** | Heat Pump Water Heater |
| **HU PEV** | High Usage Post Enrollment Verification |
| **HVAC** | Heating, Ventilation, and Air Conditioning |
| **ILLA** | International Institute of Los Angeles |
| **IOU** | Investor-Owned Utilities |
| **IQP** | Income Qualified Programs |
| **IT** | Information Technology |
| **kWh** | Kilowatt-hours |
| **LEDs** | Light-Emitting Diodes |
| **LIHEAP** | Low Income Home Energy Assistance Program |
| **LINA** | Low Income Needs Assessment |
| **LIOB** | Low-Income Oversight Board |
| **LIWP** | Low-Income Weatherization Program |
| **LO** | Loading Order |
| **LSP** | Local Service Provider |
| **MASH** | Multifamily Affordable Solar Housing |
| **MBL** | Medical Baseline |
| **ME&O** | Marketing, Education, and Outreach |
| **MF CAM** | Multifamily Common Area Measure |
| **MFWB** | Multifamily Whole Building |
| **MH** | Mobile Home |
| **NEB** | Non-Energy Benefits |
| **NEI** | Non-Energy Impacts |
| **NMEC** | Normalized Metered Energy Consumption |
| **OP** | Ordering Paragraph |

| ACRONYM | TERM |
|---|---|
| **OSHA** | Occupational Safety and Health Administration |
| **PEP** | Pilot Evaluation Plan |
| **PEV** | Post Enrollment Verification |
| **PG&E** | Pacific Gas & Electric Company |
| **PMAX** | ESA Google Performance Max |
| **PP/D** | Pilot Plus/Deep |
| **PP&IS** | Policy and Procedures and Installation Standards |
| **PSPS** | Public Safety Power Shutoff |
| **PUMS** | Public Use Microdata Sample |
| **PY** | Program Year |
| **RER** | Rate Education Report |
| **RFP** | Request For Proposal |
| **RHA** | Richard Heath & Associates, Inc. |
| **SASH** | Single Family Affordable Solar Homes |
| **SCE** | Southern California Edison |
| **SCT** | Smart Communicating Thermostat |
| **SDG&E** | San Diego Gas & Electric Company |
| **SDP** | Summer Discount Plan |
| **SEED** | Sustainable Energy Efficiency Development |
| **SEP** | Smart Energy Program |
| **SEVI** | Socioeconomic Vulnerability Index |
| **SF** | Single-Family |
| **SoCalGas** | Southern California Gas Company |
| **SOMAH** | Solar On Multifamily Affordable Housing |
| **SPOC** | Single Point of Contact |
| **SWG** | Sub-Working Groups |
| **TECH** | Technology and Equipment for Clean Heating |

| ACRONYM | TERM |
|---|---|
| **WE&T** | Workforce Education and Training |
| **WMDVBE** | Women, Minority, Disabled Veteran, or Business Enterprise |
| **WG** | Working Group |
| **YOY** | Year-Over-Year |

# Appendix A

# ESA, CARE, and FERA Program Tables

Summary Highlights – ESA, CARE, and FERA Programs

ESA Summary Table 1 – Expenses, and Energy and Demand Savings Summary

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

ESA Table 1A –Program Expenses Summary

ESA Table 2 – ESA Main (SF, MH) Expenses and Energy Savings by Measures Installed

ESA Table 2A – Multifamily Whole Building Program

ESA Table 2B –Pilot Plus and Pilot Deep

ESA Table 2C – ESA Building Electrification (SCE only) Expenses and Energy Savings by Measures Installed

ESA Table 2D – Clean Energy Homes New Construction Pilot

ESA Table 2E – ESA CSD Leveraging Expenses and Energy Savings by Measures Installed

ESA Table 3 – Program Cost Effectiveness

ESA Table 4 – ESA Detail By Housing Type and Source

ESA Table 5 – ESA Direct Purchases and Installation Contractors

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

ESA– Table 7 – ESA Expenditures Recorded by Cost Element

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

ESA– Table 9 – ESA Life Cycle Bill Savings by Measure

ESA– Table 10 – ESA Bill Savings Calculations

ESA– Table 11 – ESA Fund Shifting

ESA– Table 12 – ESA Categorical and Other Enrollment

ESA– Table 13A – ESA Leveraging and Integration

ESA Table 13B – ESA Clean Energy Referral, Leveraging, and Coordination

ESA Table 14 – ESA Expenditures for Pilots and Studies

ESA Table 15 – ESA Tribal Outreach

ESA Table 16 – ESA Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions

ESA Table 17 – Contractor Advanced Funding and Repayment (SCE only)

CARE Table 1 – CARE Overall Program Expenses

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

CARE Table 3 – CARE Post-Enrollment Verification Results

CARE Table 4 – CARE Self-Certifications, Self-Recertification Applications and Post-Enrollment Verifications

CARE Table 5 – CARE Enrollment by County

CARE Table 6 – CARE Recertification Results

CARE Table 7 – CARE Capitation Contractors

CARE Table 8 – CARE Participants as of Month-End

CARE Table 9 – CARE Average Monthly Usage and Bill

CARE Table 10 – CARE Surcharge and Revenue

CARE Table 11 – CARE Capitation Applications

CARE Table 12 – CARE Expansion Program

CARE Table 13 – CARE High Usage Verification Results

CARE Table 14 – CARE Customer Usage and ESA Program Treatment

CARE Table 15– CARE Categorical Enrollment

CARE Table 16 – CARE and Disadvantaged Communities Enrollment Rate for ZIP Codes

FERA Table 1 – FERA Overall Program Expenses

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

FERA Table 3 – FERA Post-Enrollment Verification Results

FERA Table 4 – FERA Self- Certifications, Self-Recertification Applications and Post-Enrollment Verifications

FERA Table 5 – FERA Enrollment by County

FERA Table 6 – FERA Recertification Results

FERA Table 7 – FERA Capitation Contractors

FERA Table 8 – FERA Average Monthly Usage and Bill

**Southern California Edison**
**Energy Savings Assistance (ESA) Program**
**California Alternate Rates for Energy (CARE) Program and**
**Family Electric Rate Assistance (FERA) Program**
**2025 Summary Highlights**

| 2025 Energy Savings Assistance Program Summary [1] | | | |
|---|---|---|---|
| | **Authorized / Forecasted Planning Assumptions** | **Actual** | **%** |
| Budget | $ 96,372,294 | $ 89,667,997 | 93% |
| Committed Funds [2] | $7,726,386 | $7,726,386 | 100% |
| Summary Homes Treated | 59,512 | $ 65,442 | 110% |
| Summary kWh Saved | 33,507,277 | $ 27,424,784 | 82% |
| Summary kW Demand Reduced | 13,451 | $ 3,747 | 28% |
| Summary Therms Saved | 363,961 | $ 220,152 | 60% |

[1] This includes all programs for the reporting period Main ESA, MFWB, Pilot Plus and Pilot Deep, Building Electrification, Clean Energy Homes, CSD Leveraging.
[2] Commitments per D.17-09-022, OP 131, which stated "For the purposes of this Decision, the term "committed funds" is defined as funds that are committed to a specific California Alternate Rates for Energy (CARE) Program/Energy Savings Assistance (ESA) Program contract or customer project. The term "uncommitted funds" is defined as those unspent funds that are not committed to existing CARE Program/ESA Program projects or contracts. The term "unspent funds," without qualification, refers to all CARE Program/ESA Program authorized yet unspent funds, whether committed or not, unless the term is qualified to specify whether funds are committed."

| 2025 CARE Program Summary | | | |
|---|---|---|---|
| | **Authorized Budget** | **Actual** | **%** |
| Administrative Expenses | $ 9,301,691 | $ 7,849,358 | 84% |
| Subsidies | $ 421,034,721 | $ 867,781,311 | 206% |
| Service Establishment Charge | $ - | $ - | NA |
| **Total Program Costs and Discounts** | **$ 430,336,412** | **$ 875,630,669** | 203% |
| **2025 CARE New Enrollments** | **Automatically Enrolled via Data Sharing, ESA Participation, etc** | **Self Certified as Income or Categorically Eligible** | **Self Certified as Recertification** |
| Method | 8,443 | 270,984 | 232,015 |
| **CARE Enrollment Rate** | **Estimated Eligible Participants** | **Participants** | **Enrollment Rate** |
| **Total Enrolled** | 1,284,448 | 1,364,107 | 106% |

| 2025 FERA Program Summary | | | |
|---|---|---|---|
| | **Authorized Budget** | **Actual** | **%** |
| Administrative Expenses | $ 1,548,601 | $ 979,853 | 63% |
| Subsidies | $ 51,506,652 | $ 14,937,883 | 29% |
| Service Establishment Charge | $ - | $ - | 0% |
| **Total Program Costs and Discounts** | **$ 53,055,253** | **$ 15,917,736** | 30% |
| **2025 FERA New Enrollments** | **Automatically Enrolled via Data Sharing, ESA Participation, etc** | **Self Certified as Income or Categorically Eligible** | **Self Certified as Recertification** |
| Method | 3,513 | 16,190 | 5,125 |
| **FERA Enrollment Rate** | **Estimated Eligible Participants** | **Participants** | **Enrollment Rate** |
| **Total Enrolled** | 357,233 | 45,641 | 13% |

## ESA Summary Table 1 - Expenses, and Energy and Demand Savings Summary
## Southern California Edison
## Program Year 2025 Annual Report
## ESA Summary Table 1A - Expenses Summary

| | Authorized Budget | | | Year to Date Expenses | | | % of Budget Spent YTD | | |
|---|---|---|---|---|---|---|---|---|---|
| **ESA Program Expenses:** | **Electric** | **Gas** | **Total** | **Electric** | **Gas** | **Total** | **Electric** | **Gas** | **Total** |
| | | | | | | | | | |
| ESA Main Program (SF and MH)[1] | $ 64,009,981 | $ - | $ 64,009,981 | $ 71,796,791 | $ - | $ 71,796,791 | 112% | 0% | 112% |
| ESA Multifamily Whole Building[2] | $ 14,700,798 | $ - | $ 14,700,798 | $ 8,986,609 | $ - | $ 8,986,609 | 61% | 0% | 61% |
| ESA Pilot Plus and Pilot Deep | $ 3,884,864 | $ - | $ 3,884,864 | $ 2,617,750 | $ - | $ 2,617,750 | 67% | 0% | 67% |
| Building Electrification Retrofit Pilot | $ 12,115,651 | $ - | $ 12,115,651 | $ 13,564,417 | $ - | $ 13,564,417 | 112% | 0% | 112% |
| Clean Energy Homes New Construction Pilot[3] | $ 1,661,000 | $ - | $ 1,661,000 | $ 286,686 | $ - | $ 286,686 | 17% | 0% | 17% |
| Single Point of Contact (SPOC) | $ 171,929 | $ - | $ 171,929 | $ 142,130 | $ - | $ 142,130 | 83% | 0% | 83% |
| **ESA Program TOTAL** | **$ 96,372,294** | **$ -** | **$ 96,372,294** | **$ 97,394,382** | **$ -** | **$ 97,394,382** | **101%** | **0%** | **101%** |

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

[2] Does not include MFWB Co-Funding Agreement payments/reimbursements to SDG&E (lead utility). Costs illustrates expenses only.

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

## ESA Summary Table 1B - Energy and Demand Savings

| | Authorized / Forecasted Planning Assumptions | | | Actual | | | % | | |
|---|---|---|---|---|---|---|---|---|---|
| **ESA Program:** | **kWh** | **kW** | **Therms** | **kWh** | **kW** | **Therms** | **kWh** | **kW** | **Therms** |
| | | | | | | | | | |
| ESA Main Program (SF and MH) | 31,762,240 | 12,681 | 383,213 | 20,697,740 | 3,299 | 78,195 | 65% | 26% | 20% |
| ESA Multifamily Whole Building | 10,561,043 | - | - | 3,356,022 | 372 | 11,207 | 32% | 0% | 0% |
| ESA Pilot Plus and Pilot Deep | - | - | - | 472,864 | 32 | 9,978 | 0% | 0% | 0% |
| Building Electrification Retrofit Pilot | - | - | - | 2,898,159 | 44 | 120,771 | 0% | 0% | 0% |
| Clean Energy Homes New Construction Pilot | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| CSD Leveraging | - | - | - | - | - | - | 0% | 0% | 0% |
| **ESA Program TOTAL** | **42,323,283** | **12,681** | **383,213** | **27,424,784** | **3,747** | **220,152** | **65%** | **30%** | **57%** |

# ESA Table 1 - ESA Main (SF, MH) Overall Program Expenses
## Southern California Edison
## Program Year 2025 Annual Report

| | 2025 Authorized / Forecasted Budget [1] | | | 2025 Annual Expenses | | | % of Budget Spent | | |
|---|---|---|---|---|---|---|---|---|---|
| **ESA Program:** | **Electric** | **Gas** | **Total** | **Electric** | **Gas** | **Total** | **Electric** | **Gas** | **Total** |
| Energy Efficiency [2] | $ 54,623,567 | | $ 54,623,567 | | | | | | |
| Appliances | | | $ - | $ 20,220,942 | | $ 20,220,942 | | | |
| Domestic Hot Water | | | $ - | $ 12,295,879 | | $ 12,295,879 | | | |
| Enclosure | | | $ - | $ 29,660 | | $ 29,660 | | | |
| HVAC | | | $ - | $ 10,309,405 | | $ 10,309,405 | | | |
| Maintenance | | | $ - | $ 241,665 | | $ 241,665 | | | |
| Lighting | | | $ - | $ 2,282,720 | | $ 2,282,720 | | | |
| Miscellaneous | | | $ - | $ 3,905,008 | | $ 3,905,008 | | | |
| Customer Enrollment | | | $ - | $ 9,699,191 | | $ 9,699,191 | | | |
| In Home Education | | | $ - | $ 1,836,744 | | $ 1,836,744 | | | |
| Pilot | | | $ - | $ - | | $ - | | | |
| **Energy Efficiency TOTAL** | **$ 54,623,567** | **$ -** | **$ 54,623,567** | **$ 60,821,214** | **$ -** | **$ 60,821,214** | 111% | | 111% |
| | | | | | | | | | |
| | | | | | | | | | |
| Training Center | $ 450,488 | | $ 450,488 | $ 546,754 | | $ 546,754 | 121% | | 121% |
| Inspections | $ 950,922 | | $ 950,922 | $ 1,598,484 | | $ 1,598,484 | 168% | | 168% |
| Marketing and Outreach | $ 2,539,025 | | $ 2,539,025 | $ 1,695,349 | | $ 1,695,349 | 67% | | 67% |
| Statewide Marketing Education and Outreach | $ - | | $ - | $ - | | $ - | 0% | | 0% |
| Measurement and Evaluation Studies | $ 92,500 | | $ 92,500 | $ 152,924 | | $ 152,924 | 165% | | 165% |
| Regulatory Compliance | $ 821,669 | | $ 821,669 | $ 1,132,520 | | $ 1,132,520 | 138% | | 138% |
| General Administration | $ 4,480,231 | | $ 4,480,231 | $ 5,724,839 | | $ 5,724,839 | 128% | | 128% |
| CPUC Energy Division | $ 51,579 | | $ 51,579 | $ 124,707 | | $ 124,707 | 242% | | 242% |
| **Administration Subtotal** | **$ 9,386,414** | **$ -** | **$ 9,386,414** | **$ 10,975,576** | **$ -** | **$ 10,975,576** | 117% | | 117% |
| **TOTAL PROGRAM COSTS** | **$ 64,009,981** | **$ -** | **$ 64,009,981** | **$ 71,796,791** | **$ -** | **$ 71,796,791** | **112%** | | **112%** |
| **Funded Outside of ESA Program Budget** | | | | | | | | | |
| Indirect Costs | | | | $ 1,789,683 | | $ 1,789,683 | | | |
| NGAT Costs | | | **$ -** | | | $ - | | | 0% |

| **ESA Program Administrative Expenses[2]** | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Administrative Expenses[3] | | | | $ 5,332,824 | $ - | $ 5,332,824 | | | |
| Total Program Costs | | | | $ 71,796,791 | $ - | $ 71,796,791 | | | |
| % of Administrative Spend | | | | | | 7% | | | |

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

[2] 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."

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

## ESA Table 1A - Program Expenses Summary
## Southern California Edison
## Program Year 2025 Annual Report

### ESA Table 1A-1 - Multifamily Whole Building Program Expenses

| | 2025 Authorized / Forecasted Budget | | | 2025 Annual Expenses | | | % of Budget Spent | | |
|---|---|---|---|---|---|---|---|---|---|
| | Electric | Gas | Total | Electric | Gas | Total | Electric | Gas | Total |
| ESA Multifamily Whole Building | $ 14,700,798 | $ - | $14,700,798 | $ 9,128,739 | $ - | $ 9,128,739 | 62% | 0% | 62% |
| **TOTAL** | **$ 14,700,798** | **$ -** | **$ 14,700,798** | **$ 9,128,739** | **$ -** | **$ 9,128,739** | 62% | 0% | 62% |

### ESA Table 1A-2 - Pilot Plus and Pilot Deep Expenses

| | 2025 Authorized / Forecasted Budget | | | 2025 Annual Expenses | | | % of Budget Spent | | |
|---|---|---|---|---|---|---|---|---|---|
| | Electric | Gas | Total | Electric | Gas | Total | Electric | Gas | Total |
| ESA Pilot Plus and Pilot Deep Program | $ 3,884,864 | $ - | $3,884,864 | $ 2,617,750 | $ - | $ 2,617,750 | 67% | 0% | 67% |
| **TOTAL** | **$ 3,884,864** | **$ -** | **$ 3,884,864** | **$ 2,617,750** | **$ -** | **$ 2,617,750** | 67% | 0% | 67% |

### ESA Table 1A-3 - Building Electrification Expenses

| | 2025 Authorized / Forecasted Budget | | | 2025 Annual Expenses | | | % of Budget Spent | | |
|---|---|---|---|---|---|---|---|---|---|
| | Electric | Gas | Total | Electric | Gas | Total | Electric | Gas | Total |
| ESA Building Electrification Program | $ 12,115,651 | $ - | $12,115,651 | $ 13,564,417 | $ - | $ 13,564,417 | 112% | 0% | 112% |
| **TOTAL** | **$ 12,115,651** | **$ -** | **$ 12,115,651** | **$ 13,564,417** | **$ -** | **$ 13,564,417** | 112% | 0% | 112% |

### ESA Table 1A-4 - Clean Energy Homes Expenses

| | 2025 Authorized / Forecasted Budget | | | 2025 Annual Expenses | | | % of Budget Spent | | |
|---|---|---|---|---|---|---|---|---|---|
| | Electric | Gas | Total | Electric | Gas | Total | Electric | Gas | Total |
| ESA Clean Energy Homes Program | $ 1,661,000 | $ - | $1,661,000 | $ 286,686 | $ - | $ 286,686 | 17% | 0% | 17% |
| **TOTAL** | **$ 1,661,000** | **$ -** | **$ 1,661,000** | **$ 286,686** | **$ -** | **$ 286,686** | 17% | 0% | 17% |

### ESA Table 1A-5 - Leveraging - CSD Expenses

| | 2025 Authorized / Forecasted Budget | | | 2025 Annual Expenses | | | % of Budget Spent | | |
|---|---|---|---|---|---|---|---|---|---|
| | Electric | Gas | Total | Electric | Gas | Total | Electric | Gas | Total |
| ESA Program Leveraging - CSD | $ - | $ - | $0 | $ - | $ - | $ - | 0% | 0% | 0% |
| **TOTAL** | **$ -** | **$ -** | **$ -** | **$ -** | **$ -** | **$ -** | 0% | 0% | 0% |

**ESA Table 2 - ESA Main (SF, MH) Expenses and Energy Savings by Measures Installed**
**Southern California Edison**
**Program Year 2025 Annual Report**

| ESA Main Program Total<br>2025 Completed & Expensed Installation | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Measures** | **Basic** | **Plus** | **Units** | **Quantity Installed** | **kWh [1] (Annual)** | **kW [1] (Annual)** | **Therms [1] (Annual)** | **Expenses ($)** | **% of Expenditures** | **Effective Useful Life (years)** | **Total Measure Life Cycle Bill Savings** |
| **Appliances** | | | | | | | | | | | |
| Clothes Dryer | N/A | N/A | Each | - | - | - | - | - | 0% | | |
| Dishwasher [7] | x | | Each | 40 | 2,233 | (0) | - | 30,549 | 0% | 11 | $6,177 |
| Freezer [7] | x | | Each | 2,536 | 2,150,528 | 259 | - | 3,063,973 | 5% | 11 | $5,949,345 |
| High Efficiency Clothes Washer [7] | x | | Home | 36 | 3,356 | 1 | - | 40,489 | 0% | 11 | $9,284 |
| Induction Cooking Appliance-FS | N/A | N/A | Each | - | - | - | - | - | 0% | | |
| Microwave | N/A | N/A | Each | - | - | - | - | - | 0% | | |
| Refrigerator [7] | x | | Home | 12,505 | 5,856,296 | 703 | - | 17,085,931 | 28% | 14 | $20,619,703 |
| **Domestic Hot Water** | | | | | | | | | | | |
| Combined Showerhead/TSV [7] | x | | Each | 182 | 367 | 0 | - | 8,624 | 0% | 10 | $923 |
| Faucet Aerator | N/A | N/A | Home | - | - | - | - | - | 0% | | |
| Heat Pump Water Heater | N/A | N/A | Each | - | - | - | - | - | 0% | | |
| Heat Pump Water Heater - Electric [7] | x | | Each | 428 | 705,507 | 88 | - | 2,382,309 | 4% | 10 | $1,774,323 |
| Heat Pump Water Heater - Gas [7] | x | | Each | 1,438 | (2,171,371) | (131) | 263,458 | 9,847,656 | 16% | 10 | ($1,825,197) |
| Heat Pump Water Heater - Propane [7] | x | | Each | 7 | (10,569) | (1) | - | 50,871 | 0% | 10 | ($26,580) |
| Low-Flow Showerhead | N/A | N/A | Home | - | - | - | - | - | 0% | | |
| Solar Water Heating | N/A | N/A | Home | - | - | - | - | - | 0% | | |
| Other Domestic Hot Water [2][7] | x | | Home | 134 | 147 | 0 | - | 1,330 | 0% | 10 | $370 |
| Tankless Water Heater | N/A | N/A | Each | | | | | | 0% | | |
| Thermostatic Shower Valve [7] | x | | Each | 45 | 2,227 | 0 | - | 2,298 | 0% | 10 | $5,601 |
| Thermostatic Shower Valve Combined Showerhead | N/A | N/A | Each | - | - | - | - | - | 0% | | |
| Thermostatic Tub Spout/Diverter | N/A | N/A | Each | - | - | - | - | - | 0% | | |
| Water Heater Repair | N/A | N/A | Each | - | - | - | - | - | 0% | | |
| Water Heater Replacement | N/A | N/A | Each | - | - | - | - | - | 0% | | |
| Water Heater Tank and Pipe Insulation | x | | Home | 34 | - | - | - | 2,791 | 0% | 7 | $0 |
| **Enclosure** | | | | | | | | | | | |
| Air Sealing[3] | x | | Home | 199 | 1,911 | 0 | - | $ 6,049 | 0% | 11 | $5,287 |
| Attic Insulation | x | | Home | 2,893 | 1,075 | 0 | - | $ 19,739 | 0% | 20 | $5,407 |
| Attic Insulation CAC NonElect Heat | x | | Home | 380 | 473 | 0 | 81 | $ 3,685 | 0% | 20 | $4,606 |
| Caulking | x | | Home | 9 | 196 | 0 | - | $ 187 | 0% | 11 | $542 |
| Diagnostic Air Sealing | N/A | N/A | Home | - | - | - | - | $ - | 0% | | |
| Floor Insulation | N/A | N/A | Home | - | - | - | - | $ - | 0% | | |
| Minor Home Repairs | N/A | N/A | Home | - | - | - | - | $ - | 0% | | |
| **HVAC** | | | | | | | | | | | |
| Central A/C Replacement [7] | | x | Home | 755 | 138,876 | 21 | - | $ 3,430,036 | 6% | 15 | $523,902 |
| Central Heat Pump-FS (propane or gas space) | N/A | N/A | Each | - | - | - | - | $ - | 0% | | |
| Duct Test and Seal[4] | x | | Home | 1,148 | - | - | - | $ 289,120 | 0% | 0 | $0 |
| Energy Efficient Fan Control [7] | | x | Home | 3 | 330 | 0 | - | $ 1,396 | 0% | 5 | $415 |
| Evaporative Cooler (Installation) [7] | | x | Home | 3,630 | 1,739,100 | 261 | - | $ 4,845,928 | 8% | 15 | $6,560,654 |
| Evaporative Cooler (Replacement) [7] | | x | Home | 5 | 2,805 | 0 | - | $ 6,835 | 0% | 15 | $10,582 |
| Furnace Repair | N/A | N/A | Home | - | - | - | - | $ - | 0% | | |
| Furnace Replacement | N/A | N/A | Home | - | - | - | - | $ - | 0% | | |
| Heat Pump Replacement [7] | | x | Home | 121 | 114,095 | 51 | - | $ 748,487 | 1% | 15 | $430,417 |
| Heat Pump Replacement - CAC Gas [7] | | x | Each | 20 | (17,372) | 15 | 2,931 | $ 109,529 | 0% | 15 | ($4,856) |
| Heat Pump Replacement - CAC Propane [7] | | x | Each | 2 | (2,140) | 2 | - | $ 9,834 | 0% | 15 | ($8,074) |
| High Efficiency Forced Air Unit (HE FAU) | N/A | N/A | Home | - | - | - | - | $ - | 0% | | |
| High Efficiency Forced Air Unit (HE FAU) - Early Replacement | N/A | N/A | Home | - | - | - | - | $ - | 0% | | |
| High Efficiency Forced Air Unit (HE FAU) - On Burnout | N/A | N/A | Home | - | - | - | - | $ - | 0% | | |
| Portable A/C [7] | | x | Each | 13 | (11,193) | (13) | - | $ 6,815 | 0% | 9 | ($25,335) |
| Prescriptive Duct Sealing | N/A | N/A | Home | - | - | - | - | $ - | 0% | | |
| Removed - A/C Time Delay | N/A | N/A | Home | - | - | - | - | $ - | 0% | | |
| Removed - FAU Standing Pilot Conversion | N/A | N/A | Each | - | - | - | - | $ - | 0% | | |
| Room A/C Replacement [7] | | x | Home | 97 | (9,860) | (1) | - | $ 78,911 | 0% | 9 | ($22,318) |
| Smart Thermostat [7] | x | | Home | 2,227 | 579,964 | - | - | $ 782,516 | 1% | 9.1 | $1,327,315 |
| Wholehouse Fan | N/A | N/A | Each | - | - | - | - | $ - | 0% | | |
| **Maintenance** | | | | | | | | | | | |
| Central A/C Tune up [7] | | x | Home | 860 | 101,160 | 68 | (19) | $ 120,137 | 0% | 3.3 | $83,872 |
| Furnace Clean and Tune | N/A | N/A | Home | - | - | - | - | $ - | 0% | | |
| HVAC Air Filter Service [7] | | x | Each | 358 | 3,157 | 1 | - | $ 21,984 | 0% | 1 | $794 |
| Condenser Coil Cleaning [7] | | x | Each | - | - | - | - | $ - | 0% | | |
| Evaporative Cooler - Maint Functioning [7] | | x | Each | 191 | - | - | - | $ 64,479 | 0% | 3 | $0 |
| Evaporative Cooler - Maint Non-Functioning [7] | | x | Each | 71 | 462 | 1 | - | $ 35,065 | 0% | 3 | $349 |
| Evaporative Cooler Maintenance | | x | Home | - | - | - | - | $ - | 0% | | |
| Evaporator Coil [7] | | x | Each | - | - | - | - | $ - | 0% | | |
| Fan Control Adjust [7] | | x | Each | - | - | - | - | $ - | 0% | | |
| Range Hood | N/A | N/A | Home | - | - | - | - | $ - | 0% | | |
| Refrigerant Charge Adjustment [7] | | x | Each | - | - | - | - | $ - | 0% | | |
| **Lighting** | | | | | | | | | | | |
| Exterior Hard wired LED fixtures [7] | x | | Each | 3,554 | 51,905 | - | - | $ 347,254 | 1% | 16 | $208,863 |
| LED A-Lamps [7] | x | | Each | 208,376 | 4,209,168 | 509 | (73,567) | $ 1,923,818 | 3% | 16 | $15,313,065 |
| LED R/BR Lamps [7] | x | | Each | 1,137 | 16,036 | 2 | (301) | $ 11,648 | 0% | 16 | $57,881 |
| Removed - Interior Hard wired LED fixtures | N/A | N/A | Each | | | | | | 0% | | |
| Removed - LED Night Light | N/A | N/A | Each | | | | | | 0% | | |
| Removed - LED Torchiere | N/A | N/A | Each | | | | | | 0% | | |
| Removed - Occupancy Sensor | N/A | N/A | Each | | | | | | 0% | | |
| **Miscellaneous** | | | | | | | | | | | |
| Air Purifier | N/A | N/A | Home | | | | | | 0% | | |
| CO and Smoke Alarm | N/A | N/A | Each | | | | | | 0% | | |
| Cold Storage | N/A | N/A | Each | | | | | | 0% | | |
| Comprehensive Home Health and Safety Check-up | N/A | N/A | Home | | | | | | 0% | | |
| Pool Pumps [7] | x | | Home | 476 | 356,356 | 110 | - | $ 770,471 | 1% | 10 | $896,222 |
| Smart Strip | N/A | N/A | Home | - | - | - | - | $ - | 0% | | |
| Smart Strip Tier II [7] | x | | Each | 49,499 | 6,882,515 | 1,352 | (114,387) | $ 3,134,538 | 5% | 5 | $7,865,357 |
| **Pilots** | | | | | | | | | | | |
| | | | | | | | | | 0% | | |
| **Customer Enrollment** | | | | | | | | | | | |
| ESA Outreach & Assessment | | | Home | 58,515 | | | | $ 9,699,191 | 16% | | |
| ESA In-Home Energy Education | | | Home | 58,328 | | | | $ 1,836,744 | 3% | | |
| | | | | | | | | | | | |
| **Total Savings/Expenditures** | | | | | **20,697,740** | **3,299** | **78,195** | **$ 60,821,214** | **100%** | | **$59,748,894** |
| | | | | | | | | | | | |
| Total Households Weatherized [6] | | | 64 | | | | | | | | |

| | | | | |
|---|---|---|---|---|
| **Households Treated** | | | Total | |
| - Single Family Households Treated | | | Home | 49,440 |
| - Multi-family Households Treated | | | Home | - |
| - Mobile Homes Treated | | | Home | 5,758 |
| **Total Number of Households Treated** | | | Home | 55,198 |
| **# Eligible Households to be Treated for PY[7]** | | | Home | 64,922 |
| **% of Households Treated** | | | % | 85% |
| - Master-Meter Households Treated | | | Home | 2,238 |

| | **Year to Date Expenses** | | | |
|---|---|---|---|---|
| **ESA Main Program** | **Electric** | **Gas** | **Total** | |
| **Administration** | $ 10,975,576 | | $ 10,975,576 | |
| **Direct Implementation (Non-Incentive)** | $ - | | $ - | |
| **Direct Implementation** | $ 60,821,214 | | $ 60,821,214 | *<<Includes measures costs* |
| | | | | |
| **TOTAL ESA Main COSTS** | $ 71,796,791 | $ - | $ 71,796,791 | |

[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] Other Domestic Hot Water includes Faucet Aerators and Low Flow Showerheads.
[3] 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 /
[4] 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.
[5] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, and minor home repairs.
[6] Based on authorized 2025 Program Year budget approved in CPUC Decision 21-06-015 (June 13, 2021).
[7] These measures meet the current definition of Health, Comfort, and Safety (HCS) measures, which are characterized by estimated energy savings of less than 1 therm or 1 kWh.

**ESA Table 2A - Multifamily Whole Building Program**
**Southern California Edison**
**Program Year 2025 Annual Report**

**Table 2A-1 ESA Program - Multifamily Whole Building (Southern IOU)[4]**
**2025 Completed & Expensed Installation**

| Measures[1] | Units (of Measure such as "each") | Measure Type (In-unit vs CAM/WB)[3] | Quantity Installed | Number of Units for Cap-kBTUh and Cap-Tons | kWh (Annual) | kW (Annual) | Therms (Annual) | Expenses ($) | % of Expenditure | Effective Useful Life (years) | 2025 Total Measure Life Cycle Bill Savings |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Appliances** | | | | | | | | | | | |
| High Efficiency Clothes Washer | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| High Efficiency Clothes Washer - CAM | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Refrigerator | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Refrigerator - CAM | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| | - | | | | | | | | 0.00% | | |
| **Domestic Hot Water** | | | | | | | | | | | |
| New: Non-Condensing Domestic Hot Water Boiler | Cap-kBtuh | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| New: Condensing Domestic Hot Water Boiler | Cap-kBtuh | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Storage Water Heater | Cap-kBtuh | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Tankless Water Heater | Cap-kBtuh | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Heat Pump Water Heater | kW | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Demand Control DHW Recirculation Pump | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Low flow Showerhead | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Faucet Aerator | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Thermostatic Tub Spout/Diverter | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| TSV and Low Flow Showerhead | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Thermostatic Shower Valve | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Water Heater Tank and Pipe Insulation | Household | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Water Heater Repair/Replacement | Household | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Heat Pump Water Heater - FS - CAM | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Hot Water Pipe Insulation | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Boiler Controls | Each | CAM/WB | - | | - | - | - | - | | - | - |
| **Envelope** | | | | | | | | | | | |
| Air Sealing | Household | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Attic Insulation | Sq Ft | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Attic Insulation - CAM | Sq Ft | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Wall Insulation Blow-in | Sq Ft | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Windows | Sq Ft | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Window Film | Sq Ft | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Repair Ceiling/Floor/Wall (Interior/Exterior) | Area-ft2 | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| | | | | | | | | | | | |
| **HVAC** | | | | | | | | | | | |
| Air Conditioners Split System - CAM | Cap-Tons | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Heat Pump Split System | Cap-Tons | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| New: Packaged Air Conditioner - CAM | Cap-Tons | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Package Terminal A/C | Cap-Tons | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Package Terminal Heat Pump | Cap-Tons | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Furnace Replacement | Cap-kBtuh | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Space Heating Boiler | Cap-kBtuh | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Smart Thermostats | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Smart Thermostats - CAM | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Furnace Repair/Replacement | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Central A/C Replacement | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| High Efficiency Forced Air Unit (HE FAU) | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Portable A/C | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Central A/C Tune up | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Blower Motor Retrofit | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Efficient Fan Controller | Area-ft2-BA | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| | | | | | | | | | | | |
| **Lighting** | | | | | | | | | | | |
| Interior LED Lighting | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Interior LED Lighting - CAM | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Interior TLED Type A Lamps | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Interior TLED Type C Lamps | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| New: LED T8 Lamp - Interior | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| New: LED T8 Lamp - Exterior | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| LED, New Fixtures, Exterior - CAM | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| LED, New Fixtures, Interior - CAM | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Interior LED Screw-in | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Interior LED Exit Sign | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Exterior LED Lighting | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| New: LED Parking Garage Fixtures | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| LED Exterior Wall or Pole Mounted Fixture | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| LED, Wall Mounted Fixture, Exterior - CAM | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| LED, Pole Mounted Fixture, Exterior - CAM | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| LED Corn Lamp for Exterior Wall or Pole Mounted | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| LED, Type A Lamps - CAM | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| LED, A Lamps - CAM | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Exterior LED Lighting - Pool | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Wall or Ceiling Mounted Occupancy Sensor - CAM | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| LED Diffuse A-Lamps | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| LED Reflector Bulbs | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| LED, PAR/R/BR Lamps, Interior - CAM | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| | | | | | | | | | | | |
| **Miscellaneous** | | | | | | | | | | | |
| Tier-2 Smart Power Strip | Household | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Tier-2 Smart Power Strip - CAM | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Variable Speed Pool Pump | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Cold Storage | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Air Purifier | Household | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| CO and Smoke Alarm | Household | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Minor Repair | Household | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| | | | | | | | | | | | |
| **Electrification** | | | | | | | | | | | |
| New - Central Heat Pump-FS (propane or gas space) | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Heat Pump Clothes Dryer - FS | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Induction Cooktop - FS | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Ductless Mini-split Heat Pump - FS | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Heat Pump Water Heater - FS | Each | In-Unit | - | | - | - | - | - | 0.00% | - | - |
| Heat Pump Pool Heater - FS | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Ductless Mini Split - FS | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| Heat Pump Water Heater - FS | Each | CAM/WB | - | | - | - | - | - | 0.00% | - | - |
| **Customer Enrollment - In Unit** | | | | | | | | | | | |
| ESA Outreach & Assessment | Household | In-Unit | - | | | | | - | 0.00% | | - |
| ESA In-Home Energy Education | Household | In-Unit | - | | | | | - | 0.00% | | - |
| **Ancillary Services** | | | | | | | | | | | |
| Ancillary Services , Common Area - CAM | Each | CAM/WB | | | | | | - | 0.00% | | - |
| Assessment CAM | Each | CAM/WB | | | | | | - | 0.00% | | - |
| Enrollment Whole Building | Each | CAM/WB | | | | | | - | 0.00% | | - |
| Project Completion, Common Area - CAM | Each | CAM/WB | | | | | | - | 0.00% | | - |
| Project Completion, Whole Building | Each | In-Unit | | | | | | - | 0.00% | | - |
| Project Completion, In Unit | Each | CAM/WB | | | | | | - | 0.00% | | - |
| Taxes | | | | | | | | - | 0.00% | | - |
| Shipping | | | | | | | | - | 0.00% | | - |
| Permit Fee | | | | | | | | - | 0.00% | | - |
| QA/Inspection, In Unit | | | | | | | | - | 0.00% | | - |
| Implementer QA/Inspection, In Unit | | | | | | | | - | 0.00% | | - |
| | | | | | | | | | | | |
| **Total** | | | - | - | - | - | - | $ - | 0.00% | | $ - |

**Table 2A-2 ESA Program - Multifamily Whole Building - [SCE]**
**2025 Completed & Expensed Installation [6]**

| Measures[1] | Units (of Measure such as "each") | Measure Type (In-unit vs CAM/WB)[3] | Quantity Installed | Number of Units for Cap-kBTUh and Cap-Tons | kWh (Annual) | kW (Annual) | Therms (Annual) | Expenses ($) | % of Expenditure | Effective Useful Life (years) | 2025 Total Measure Life Cycle Bill Savings |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Appliances** | | | | | | | | | | | |
| High Efficiency Clothes Washer | Each | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| High Efficiency Clothes Washer - CAM | Each | CAM/WB | 21 | - | 5,538 | 1 | 441.00 | $ 28,800 | 0.39% | 11 | $ 12,609 |
| Refrigerator | Each | In-Unit | 963 | - | 522,909 | 63 | - | $ 1,209,659 | 16.17% | 14 | $ 1,515,291 |
| Refrigerator - CAM | Each | CAM/WB | 8 | - | 3,258 | 0 | - | $ 10,272 | 0.14% | 14 | $ 9,441 |
| | - | | | | | | | | | | |
| **Domestic Hot Water** | | | | | | | | | | | |
| New: Non-Condensing Domestic Hot Water I | Cap-kBtuh | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| New: Condensing Domestic Hot Water Boiler | Cap-kBtuh | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Storage Water Heater | Cap-kBtuh | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Tankless Water Heater | Cap-kBtuh | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Heat Pump Water Heater [5] | kW | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Demand Control DHW Recirculation Pump | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Low flow Showerhead | Each | In-Unit | 402 | - | 77,650 | 15 | - | $ 13,531 | 0.18% | 10 | $ 160,725 |
| Faucet Aerator | Each | In-Unit | 939 | - | 90,249 | 18 | - | $ 10,400 | 0.14% | 10 | $ 186,803 |
| Thermostatic Tub Spout/Diverter | Each | In-Unit | 105 | - | 14,499 | 3 | - | $ 13,167 | 0.18% | 10 | $ 30,011 |
| TSV and Low Flow Showerhead | Each | In-Unit | 107 | - | 11,330 | 2 | - | $ 5,080 | 0.07% | 10 | $ 23,452 |
| Thermostatic Shower Valve | Each | In-Unit | 193 | - | 12,672 | 3 | - | $ 8,865 | 0.12% | 10 | $ 26,230 |
| Water Heater Tank and Pipe Insulation | Household | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| Water Heater Repair/Replacement | Household | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| Heat Pump Water Heater - FS - CAM | Each | CAM/WB | 4 | - | (5,340) | - | 781.00 | $ 40,500 | 0.54% | 10 | $ (11,053) |
| Hot Water Pipe Insulation | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Boiler Controls | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| **Envelope** | | | | | | | | | | | |
| Air Sealing | Household | In-Unit | 2,736 | - | - | - | - | $ 29,673 | 0.40% | 3 | $ - |
| Attic Insulation | Sq Ft | In-Unit | 1,850 | - | 77 | 0 | 29.32 | $ 2,057 | 0.03% | 30 | $ 475 |
| Attic Insulation - CAM | Sq Ft | CAM/WB | 86,450 | - | 14,456 | 13 | 975.62 | $ 88,952 | 1.19% | 30 | $ 89,766 |
| Wall Insulation Blow-in | Sq Ft | CAM/WB | 13,000 | - | 7,020 | 5 | 1,404.00 | $ 10,400 | 0.14% | 30 | $ 43,591 |
| Windows | Sq Ft | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Window Film | Sq Ft | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Repair Ceiling/Floor/Wall (Interior/Exterior) | Area-ft2 | In-Unit | 181 | - | - | - | - | $ 2,711 | 0.04% | 3 | $ - |
| | | | | | | | | | | | |
| **HVAC** | | | | | | | | | | | |
| Air Conditioners Split System - CAM | Cap-Tons | CAM/WB | 145 | - | 2,285 | 2 | (6.81) | $ 510,387 | 6.82% | 15 | $ 7,095 |
| Heat Pump Split System | Cap-Tons | CAM/WB | 19 | - | 1,507 | 1 | - | $ 67,390 | 0.90% | 15 | $ 4,679 |
| New: Packaged Air Conditioner - CAM | Cap-Tons | CAM/WB | 4 | - | 1,328 | 0 | 9.60 | $ 7,520 | 0.10% | 15 | $ 4,123 |
| Package Terminal A/C | Cap-Tons | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Package Terminal Heat Pump | Cap-Tons | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Furnace Replacement [5] | Cap-kBtuh | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Space Heating Boiler | Cap-kBtuh | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Smart Thermostats | Each | In-Unit | 3,037 | - | 279,341 | - | 7,070.16 | $ 483,704 | 6.47% | 9 | $ 526,159 |
| Smart Thermostats - CAM | Each | CAM/WB | 51 | - | 3,100 | - | 33.01 | $ 13,426 | 0.18% | 9 | $ 5,839 |
| Furnace Repair/Replacement | Each | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| Central A/C Replacement | Each | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| High Efficiency Forced Air Unit (HE FAU) | Each | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| Portable A/C | Each | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| Central A/C Tune up | Each | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| Blower Motor Retrofit | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Efficient Fan Controller | Area-ft2-BA | In-Unit | 535,633 | - | 207,104 | 198 | 4,093.35 | $ 57,794 | 0.77% | 5 | $ 285,073 |
| | | | | | | | | | | | |
| **Lighting** | | | | | | | | | | | |
| Interior LED Lighting | Each | In-Unit | 4,357 | - | 69,493 | 8 | (1,324.43) | $ 58,084 | 0.78% | 16 | $ 230,147 |
| Interior LED Lighting - CAM | Each | CAM/WB | 836 | - | 23,869 | - | - | $ 111,852 | 1.50% | 16 | $ 79,049 |
| Interior TLED Type A Lamps | Each | In-Unit | 14,167 | - | 88,788 | 10 | (1,643.52) | $ 152,062 | 2.03% | 12 | $ 220,535 |
| Interior TLED Type C Lamps | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| New: LED T8 Lamp - Interior | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| New: LED T8 Lamp - Exterior | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| LED, New Fixtures, Exterior - CAM | Each | CAM/WB | 328 | - | 4,082 | 0 | (78.10) | $ 51,319 | 0.69% | 16 | $ 13,517 |
| LED, New Fixtures, Interior - CAM | Each | CAM/WB | 533 | - | 28,555 | 1 | (261.20) | $ 91,826 | 1.23% | 12 | $ 68,895 |
| Interior LED Screw-in | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Interior LED Exit Sign | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Exterior LED Lighting | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| New: LED Parking Garage Fixtures | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| LED Exterior Wall or Pole Mounted Fixture | Each | CAM/WB | 2 | - | 178 | - | - | $ 1,200 | 0.02% | 16 | $ 590 |
| LED, Wall Mounted Fixture, Exterior - CAM | Each | CAM/WB | 170 | - | 10,879 | 0 | - | $ 43,650 | 0.58% | 16 | $ 36,028 |
| LED, Pole Mounted Fixture, Exterior - CAM | Each | CAM/WB | 33 | - | 2,578 | - | - | $ 17,875 | 0.24% | 12 | $ 8,027 |
| LED Corn Lamp for Exterior Wall or Pole M | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| LED, Type A Lamps - CAM | Each | CAM/WB | 280 | - | 11,035 | 0 | (142.97) | $ 7,344 | 0.10% | 5 | $ 10,529 |
| LED, A Lamps - CAM | Each | CAM/WB | 21 | - | 1,724 | 0 | (32.97) | $ 420 | 0.01% | 12 | $ 4,282 |
| Exterior LED Lighting - Pool | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Wall or Ceiling Mounted Occupancy Sensor - | Each | CAM/WB | 53 | - | 10,394 | 0 | (149.17) | $ 6,319 | 0.08% | 8 | $ 17,212 |
| LED Diffuse A-Lamps | Each | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| LED Reflector Bulbs | Each | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| LED, PAR/R/BR Lamps, Interior - CAM | Each | CAM/WB | 6 | - | 284 | 0 | (1.85) | $ 180 | 0.00% | 12 | $ 706 |
| | | | | | | | | | | | |
| **Miscellaneous** | | | | | | | | | | | |
| Tier-2 Smart Power Strip | Household | In-Unit | 9,448 | - | 1,826,944 | 25 | (2.89) | $ 724,225 | 9.68% | 3 | $ 631,515 |
| Tier-2 Smart Power Strip - CAM | Each | CAM/WB | 4 | - | 773 | 0 | (0.00) | $ 400 | 0.01% | 2 | $ 267 |
| Variable Speed Pool Pump | Each | CAM/WB | 5 | - | 27,670 | 3 | - | $ 15,045 | 0.20% | 3 | $ 57,273 |
| Cold Storage | Each | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| Air Purifier | Household | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| CO and Smoke Alarm | Household | In-Unit | 2,746 | - | - | - | - | $ 57,532 | 0.77% | 3 | $ - |
| Minor Repair | Household | In-Unit | 27,149 | - | - | - | - | $ 414,592 | 5.54% | 3 | $ - |
| | | | | | | | | | | | |
| **Electrification** | | | | | | | | | | | |
| New - Central Heat Pump-FS (propane or ga | Each | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| Heat Pump Clothes Dryer - FS | Each | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| Induction Cooktop - FS | Each | In-Unit | 1 | - | (207) | - | 14.30 | $ 1,762 | 0.02% | 16 | $ (686) |
| Ductless Mini-split Heat Pump - FS | Each | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| Heat Pump Water Heater - FS | Each | In-Unit | - | - | - | - | - | $ - | 0.00% | | $ - |
| Heat Pump Pool Heater - FS | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Ductless Mini Split - FS | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| Heat Pump Water Heater - FS | Each | CAM/WB | - | - | - | - | - | $ - | 0.00% | | $ - |
| **Customer Enrollment - In Unit** | | | | | | | | | | | |
| ESA Outreach & Assessment | Household | In-Unit | 10,887 | | | | | $ 481,720 | 6.44% | | $ - |
| ESA In-Home Energy Education | Household | In-Unit | 10,772 | | | | | $ 179,387 | 2.40% | | $ - |
| **Ancillary Services** | | | | | | | | | | | |
| Ancillary Services , Common Area - CAM | Each | CAM/WB | 14 | | - | - | - | $ 41,935 | 0.56% | | $ - |
| Assessment CAM | Each | CAM/WB | 263 | | - | - | - | $ 711,424 | 9.51% | | $ - |
| Enrollment Whole Building | Each | CAM/WB | 303 | | - | - | - | $ 496,218 | 6.63% | | $ - |
| Project Completion, Common Area - CAM | Each | CAM/WB | 39 | | - | - | - | $ 116,718 | 1.56% | | $ - |
| Project Completion, In Unit | Each | In-Unit | 10,195 | | - | - | - | $ 546,341 | 7.30% | | $ - |
| Project Completion, Whole Building | Each | CAM/WB | 39 | | - | - | - | $ 141,618 | 1.89% | | $ - |
| Taxes | | | 11,457 | | - | - | - | $ 212,636 | 2.84% | | $ - |
| Shipping | | | 11 | | - | - | - | $ 7,055 | 0.09% | | $ - |
| Permit Fee | | | 54 | | - | - | - | $ 15,890 | 0.21% | | $ - |
| QA/Inspection, In Unit | | | 8,729 | | - | - | - | $ 99,015 | 1.32% | | $ - |
| Implementer QA/Inspection, In Unit | | | 8,731 | | - | - | - | $ 59,433 | 0.79% | | $ - |
| | | | | | | | | | | | |
| **Total** | - | | | - | 3,356,022 | 372 | 11,207 | $ 7,479,364 | 100% | - | $ 4,298,197 |

| 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 Households Treated (In-Unit) | Number |
|---|---|
| Total Number of Households Individually Treated | 0 |

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

| Multifamily Properties Treated [6] | Number |
|---|---|
| Total Number of Multifamily Properties Treated[1] | 399 |
| Subtotal of Master-metered Multifamily Properties Treated | N/A |
| Total Number of Multifamily Tenant Units w/in Properties Treated[2] | 13,864 |
| Total Number of buildings w/in Properties Treated | 946 |

21786 3.631

| Multifamily Households Treated (In-Unit) | Number |
|---|---|
| Total Number of Households Individually Treated | 9,894 |

| ESA Program - MFWB | Year to Date Expenses [1][6] Electric | Gas | Total | |
|---|---|---|---|---|
| Administration | $ 1,186,570 | $ - | $ 1,186,570 | |
| Direct Implementation (Non-Incentive) | $ 3,118,587 | $ - | $ 3,118,587 | |
| Direct Implementation | $ 4,681,452 | $ - | $ 4,681,452 | <<Includes measures costs |
| SPOC | $ 142,130 | $ - | $ 142,130 | |
| | | | | |
| TOTAL MFWB COSTS | $ 9,128,739 | $ - | $ 9,128,739 | |

[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.

[4] Southern IOU consolidated data will be provided by SDG&E, the lead utility.

[5] These measures meet the current definition of Health, Comfort, and Safety (HCS) measures, which are characterized by estimated energy savings of less than 1 therm or 1 kWh.

[6] The reported 2025 actual treatment, savings, and costs include projects completed in PY 2024. These units are included in the 2025 Actual total due to delays in receiving Southern Multifamily Whole Building (MFWB) program data.

**Energy Savings Assistance Program Table 2B - Pilot Plus and Pilot Deep**
**Southern California Edison**
**Program Year 2025 Annual Report**

| Measures | Units | ESA Program - Pilot Plus<br>Year-To-Date Completed & Expensed Installation<br>Quantity Installed | kWh (Annual) | kW (Annual) | Therms (Annual) | Expenses ($) | % of Expenditure | Effective Useful Life (years) | 2025 Total Measure Life Cycle Bill Savings |
|---|---|---|---|---|---|---|---|---|---|
| **Appliances** | | | | | | | | | |
| Energy Star Chest Freezer: 14-18 cf | Each | - | - | - | - | $ - | 0% | | - |
| Energy Star Chest Freezer: 20-22 cf | Each | - | - | - | - | $ - | 0% | | - |
| Energy Star Chest Freezer: 5-9 cf | Each | - | - | - | - | $ - | 0% | | - |
| Energy Star Qualified Clothes Washer | Each | - | - | - | - | $ - | 0% | | - |
| HP Washer/Dryer Combo Unit | Each | - | - | - | - | $ - | 0% | | - |
| Energy Star Qualified Dishwashers | Each | 2 | 45 | 0.011 | 1 | $ 2,060 | 2% | 11 | 142 |
| Energy Star Qualified Refrigerators - Large 20+ cf | Each | 3 | 142 | 0.000 | (2) | $ 4,305 | 4% | 14 | 462 |
| Energy Star Qualified Refrigerators - Medium 17 - 19 cf | Each | - | - | - | - | $ - | 0% | | - |
| Energy Star Qualified Refrigerators - Small 14-16 cf | Each | - | - | - | - | $ - | 0% | | - |
| Energy Star Upright Freezer: 13.5-15 cf | Each | - | - | - | - | $ - | 0% | | - |
| Energy Star Upright Freezer: 16-18 cf | Each | - | - | - | - | $ - | 0% | | - |
| Energy Star Upright Freezer: 20-22 cf | Each | - | - | - | - | $ - | 0% | | - |
| **Cooling Measures** | | | | | | | | | |
| Energy Star Qualified Ceiling Fans | Each | 1 | 60 | 0.008 | (1) | $ 300 | 0% | - | - |
| Whole House Fan | Each | - | - | - | - | $ - | 0% | - | - |
| Evaporative cooler installation 3,000 CFM | Each | - | - | - | - | $ - | 0% | - | - |
| Evaporative cooler installation 4,000 CFM | Each | - | - | - | - | $ - | 0% | - | - |
| Evaporative cooler installation 5,000 CFM | Each | - | - | - | - | $ - | 0% | - | - |
| Replace Room AC with Energy Start Qualified RAC - 10k | Each | - | | - | - | $ - | 0% | - | - |
| Replace Room AC with Energy Start Qualified RAC - 12k | Each | - | - | - | - | $ - | 0% | | - |
| Replace Room AC with Energy Start Qualified RAC - 15k | Each | - | - | - | - | $ - | 0% | - | - |
| Replace Room AC with Energy Start Qualified RAC - 6-8k | Each | - | - | - | - | $ - | 0% | | - |
| **Domestic Hot Water** | | | | | | | | | |
| Faucet Aerator | Each | 41 | 292 | 0.156 | 166 | $ 385 | 0% | 7 | 2,015 |
| Low-Flow Showerhead - Handheld | Each | 38 | 1,573 | 0.443 | 257 | $ 1,614 | 1% | 10 | 7,504 |
| Low-Flow Showerhead - Regular | Each | | | | | | 0% | | - |
| Energy Star HE Gas Storage Water Heater - 40G | Each | | | | | | 0% | | - |
| Energy Star HE Gas Storage Water Heater - 50G | Each | | | | | | 0% | | - |
| Replace existing electric W/H with HP Water Heater - 40G | Each | | | | | | 0% | | - |
| Replace existing electric W/H with HP Water Heater - 50G | Each | | | | | | 0% | | - |
| Replace existing electric W/H with HP Water Heater - 80G | Each | | | | | | 0% | | - |
| Replace with Solar Water Heating w/storage back up | Each | | | | | | 0% | | - |
| Replace with Solar Water Heating w/tankless back up | Each | | | | | | 0% | | - |
| Replace with Tankless Water Heater | Each | | | | | | 0% | | - |
| Thermostatic Shower Valve | Each | 38 | 905 | 0.476 | 299 | $ 2,145 | 2% | 10 | 6,408 |
| Thermostatic Tub Spout/Diverter | Each | - | - | - | - | $ - | 0% | | - |
| Water Heater - Repair water leak - NTE $300 | T&M | - | - | - | - | $ - | 0% | | - |
| Water Heater Blanket | Each | - | - | - | - | $ - | 0% | | - |
| Water Heater Pipe Insulation | Each | 13 | - | - | 25 | $ 369 | 0% | | - |
| **Enclosure** | | | | | | | | | |
| Attic Cover Replacement | Each | - | - | - | - | $ - | 0% | | - |
| Attic Insulation, Add R-11 | Per Square | - | - | - | - | $ - | 0% | | - |
| Attic Insulation, Add R-19 | Per Square | 5,311 | 74 | - | 133 | $ 12,508 | 10% | 20 | 4,048 |
| Attic Insulation, Add R-30 | Per Square | 1,879 | 164 | 0.226 | 38 | $ 4,039 | 3% | 20 | 1,870 |
| Attic Insulation, Add R-38 | Per Square | | | | | | 0% | | - |
| Attic Insulation, Add R-49 | Per Square | | | | | | 0% | | - |
| Caulking | Per Linear | | | | | | 0% | | - |
| Cover Plate Gaskets | Per Home | | | | | | 0% | | - |
| Duct Sealing - 120 Minutes | Per System | 18 | 1,878 | 1.008 | 48 | $ 6,840 | 6% | 18 | 9,689 |
| Duct Sealing - 60 Minutes | Per System | - | - | - | - | $ - | 0% | | - |
| Duct Sealing - 90 Minutes | Per System | - | - | - | - | $ - | 0% | | - |
| Floor Insulation, Add R-19 | Per Square | - | - | - | - | $ - | 0% | | - |
| Glass Replacement | Per Square | - | - | - | - | $ - | 0% | | - |
| High Efficiency Windows | Per Square | - | - | - | - | $ - | 0% | | - |
| High-Performance Cool Roofs | Per Square | - | - | - | - | $ - | 0% | | - |
| Insulated Exterior Doors | Per Door | - | - | - | - | $ - | 0% | | - |
| Kitchen Exhaust Dampers | Each | - | - | - | - | $ - | 0% | | - |
| Minor Home / Envelop Repairs - NTE $600 | T&M | - | - | - | - | $ - | 0% | | - |
| Prescriptive Duct Sealing (No HVAC Replacement) | Per System | - | - | - | - | $ - | 0% | | - |
| Radiant Barriers | Per Square | - | - | - | - | $ - | 0% | | - |
| Room AC/Evaporative Cooler Cover | Each | - | - | - | - | $ - | 0% | | - |
| Wall Insulation, Add R-13 | Per Square | - | - | - | - | $ - | 0% | | - |
| Weather-stripping | Per Linear | 576 | - | - | 0 | $ 3,312 | 3% | 15 | 2 |
| Window Film (Tint) | Per Square | - | - | - | - | $ - | 0% | | - |
| **HVAC** | | | | | | | | | |
| Duct Insulation (R-6) | Per Linear | - | - | - | - | $ - | 0% | | - |
| Duct Repair | Each | 1 | - | - | - | $ 32 | 0% | - | - |
| Duct Replacement | Per Linear | 30 | - | - | - | $ 315 | 0% | - | - |
| Duct Test - Title 24 or to perform duct sealing | Per System | 18 | - | - | - | $ 2,550 | 2% | - | - |
| ECM Blower Motor | Each | - | - | - | - | $ - | 0% | | - |
| Efficient Fan Controller | Each | 17 | 5,040 | 5.293 | - | $ 4,675 | 4% | 15 | 19,015 |
| HE Wall Furnace 82% AFUE | Each | - | - | - | - | $ - | 0% | | - |
| HVAC System - Filter Replacement (No HVAC Replacement) | Each | 19 | 155 | 0.072 | - | $ 1,235 | 1% | 1 | 39 |
| HVAC Tune-up | Each | 17 | 839 | 0.289 | (0) | $ 7,330 | 6% | 3 | 632 |
| Mobile Home Split System, 2 TON 16 SEER/60 KBTU 95% | Each | - | - | - | - | $ - | 0% | | - |
| Mobile Home Split System, 2 TON 16 SEER/75 KBTU 95% | Each | - | - | - | - | $ - | 0% | | - |
| Mobile Home Split System, 3 TON 16 SEER/60 KBTU 95% | Each | - | - | - | - | $ - | 0% | | - |
| Mobile Home Split System, 3 TON 16 SEER/75 KBTU 95% | Each | - | - | - | - | $ - | 0% | | - |
| Mobile Home Split System, 4 TON 16 SEER/72 KBTU 95% | Each | - | - | - | - | $ - | 0% | | - |
| Replace FAU with HE FAU, 100 KBTU 95% AFUE | Each | - | - | - | - | $ - | 0% | | - |
| Replace FAU with HE FAU, 40 KBTU 95% AFUE | Each | - | - | - | - | $ - | 0% | | - |
| Replace FAU with HE FAU, 60 KBTU 95% AFUE | Each | - | - | - | - | $ - | 0% | | - |
| Replace FAU with HE FAU, 80 KBTU 95% AFUE | Each | - | - | - | - | $ - | 0% | | - |
| Replace Package G/E with 16+ SEER/80%+ AFUE - 2 1/2 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Package G/E with 16+ SEER/80%+ AFUE - 2 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Package G/E with 16+ SEER/80%+ AFUE - 3 1/2 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Package G/E with 16+ SEER/80%+ AFUE - 3 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Package G/E with 16+ SEER/80%+ AFUE - 4 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Package G/E with 16+ SEER/80%+ AFUE - 5 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Package HP with 16+ SEER/8.5+ HSPF - 2 1/2 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Package HP with 16+ SEER/8.5+ HSPF - 2 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Package HP with 16+ SEER/8.5+ HSPF - 3 1/2 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Package HP with 16+ SEER/8.5+ HSPF - 3 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Package HP with 16+ SEER/8.5+ HSPF - 4 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Package HP with 16+ SEER/8.5+ HSPF - 5 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split AC Only with 16+ SEER - 2 1/2 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split AC Only with 16+ SEER - 2 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split AC Only with 16+ SEER - 3 1/2 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split AC Only with 16+ SEER - 3 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split AC Only with 16+ SEER - 4 Ton | Each | 3 | 1,380 | 1.248 | (6) | $ 18,600 | 16% | 15 | 5,079 |
| Replace Split AC Only with 16+ SEER - 5 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split HP System with 16+ SEER/8.8+ HSPF - 2 1/2 | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split HP System with 16+ SEER/8.8+ HSPF - 2 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split HP System with 16+ SEER/8.8+ HSPF - 3 1/2 | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split HP System with 16+ SEER/8.8+ HSPF - 3 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split HP System with 16+ SEER/8.8+ HSPF - 4 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split HP System with 16+ SEER/8.8+ HSPF - 5 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split System with 16+ SEER/95%+ AFUE - 2 1/2 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split System with 16+ SEER/95%+ AFUE - 2 Ton | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split System with 16+ SEER/95%+ AFUE - 3 1/2 Ton[4] | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split System with 16+ SEER/95%+ AFUE - 3 Ton[4] | Each | - | - | - | - | $ - | 0% | | - |
| Replace Split System with 16+ SEER/95%+ AFUE - 4 Ton | Each | 3 | 1,892 | 1.568 | 19 | $ 24,805 | 21% | 18 | 9,049 |
| Replace Split System with 16+ SEER/95%+ AFUE - 5 Ton[4] | Each | 1 | 895 | 0.720 | 13 | $ 9,850 | 8% | 18 | 4,386 |
| Smart Thermostat | Each | 3 | 515 | - | 27 | $ 705 | 1% | 9 | 1,501 |
| **Maintenance** | | | | | | | | | |
| CO/Smoke Alarm Combo | Each | - | - | - | - | $ - | 0% | | - |
| Comprehensive Home Health and Safety Check-up | Per Home | 21 | - | - | - | $ 1,659 | 1% | - | - |
| Furnace Clean and Tune | Each | 22 | - | - | - | $ 1,617 | 1% | - | - |
| Range Hood | Each | - | - | - | - | $ - | 0% | | - |
| Smoke Alarm | Each | - | - | - | - | $ - | 0% | | - |
| **Lighting** | | | | | | | | | |
| Exterior LED Security Light (photocell and motion sensor) | Each | - | - | - | - | $ - | 0% | | - |
| LED Fixtures - Exterior | Each | - | - | - | - | $ - | 0% | | - |
| LED Fixtures - Interior | Each | - | - | - | - | $ - | 0% | | - |
| LED Lamps - 40w Equivalent | Each | - | - | - | - | $ - | 0% | | - |
| LED Lamps - 60w Equivalent | Each | 128 | 2,879 | 0.230 | (45) | $ 1,560 | 1% | 16 | 10,598 |
| **Miscellaneous** | | | | | | | | | |
| Energy Star Qualified Variable Speed Pool pumps | Each | - | - | - | - | $ - | 0% | | - |
| Home Energy Monitor | Each | 1 | - | - | - | $ 75 | 0% | - | - |
| Tier 2 Smart Power Strips | Each | - | - | - | - | $ - | 0% | | - |
| Vacancy Sensors | Each | - | - | - | - | $ - | 0% | | - |
| **Permitting Fees** | | | | | | | | | |
| Permits | Each | 6 | - | - | - | $ 1,503 | 1% | | |

| Measures | Units | ESA Program - Pilot Deep<br>Year-To-Date Completed & Expensed Installation<br>Quantity Installed | kWh (Annual) | kW (Annual) | Therms (Annual) | Expenses ($) | % of Expenditure |
|---|---|---|---|---|---|---|---|
| **Appliances** | | | | | | | |
| Energy Star Chest Freezer: 14-18 cf | Each | 2 | 698 | - | (3.12) | $ 2,390 | 0% |
| Energy Star Chest Freezer: 20-22 cf | Each | - | - | - | - | $ - | 0% |
| Energy Star Chest Freezer: 5-9 cf | Each | - | - | - | - | $ - | 0% |
| Energy Star Qualified Clothes Washer | Each | 2 | - | - | 20.63 | $ 2,290 | 0% |
| HP Washer/Dryer Combo Unit | Each | - | - | - | - | $ - | 0% |
| Energy Star Qualified Dishwashers | Each | - | - | - | - | $ - | 0% |
| Energy Star Qualified Refrigerators - Large 20+ cf | Each | 25 | 10,865 | - | (69.33) | $ 35,875 | 2% |
| Energy Star Qualified Refrigerators - Medium 17 - 19 cf | Each | - | - | - | - | $ - | 0% |
| Energy Star Qualified Refrigerators - Small 14-16 cf | Each | 1 | 548 | - | (1.38) | $ 1,000 | 0% |
| Energy Star Upright Freezer: 13.5-15 cf | Each | 1 | - | - | - | $ 925 | 0% |
| Energy Star Upright Freezer: 16-18 cf | Each | - | - | - | - | $ - | 0% |
| Energy Star Upright Freezer: 20-22 cf | Each | - | - | - | - | $ - | 0% |
| **Cooling Measures** | | | | | | | |
| Energy Star Qualified Ceiling Fans | Each | 3 | (47) | - | 0.53 | $ 900 | |
| Whole House Fan | Each | 67 | 16,685 | 8.24 | (41.49) | $ 208,356 | 11% |
| Evaporative cooler installation 3,000 CFM | Each | 1 | 17,943 | - | - | $ 1,415 | 0% |
| Evaporative cooler installation 4,000 CFM | Each | 2 | 722 | - | - | $ 3,025 | 0% |
| Evaporative cooler installation 5,000 CFM | Each | 2 | 913 | - | - | $ 3,680 | 0% |
| Replace Room AC with Energy Start Qualified RAC - 10k | Each | - | - | - | - | $ - | 0% |
| Replace Room AC with Energy Start Qualified RAC - 12k | Each | - | - | - | - | $ - | 0% |
| Replace Room AC with Energy Start Qualified RAC - 15k | Each | - | - | - | - | $ - | 0% |
| Replace Room AC with Energy Start Qualified RAC - 6-8k | Each | 2 | 484 | - | - | $ 1,700 | 0% |
| **Domestic Hot Water** | | | | | | | |
| Faucet Aerator | Each | 224 | 1,033 | 0.05 | 668.96 | $ 2,239 | 0% |
| Low-Flow Showerhead - Handheld | Each | 206 | 3,616 | 0.38 | 1,324.28 | $ 8,989 | 0% |
| Low-Flow Showerhead - Regular | Each | 6 | 47 | - | 38.15 | $ 240 | 0% |
| Energy Star HE Gas Storage Water Heater - 40G | Each | - | - | - | - | $ - | 0% |
| Energy Star HE Gas Storage Water Heater - 50G | Each | - | - | - | - | $ - | 0% |
| Replace existing electric W/H with HP Water Heater - 40G | Each | 1 | - | - | 30.93 | $ 2,540 | 0% |
| Replace existing electric W/H with HP Water Heater - 50G | Each | 1 | - | - | 34.17 | $ 3,164 | 0% |
| Replace existing electric W/H with HP Water Heater - 80G | Each | - | - | - | - | $ - | 0% |
| Replace with Solar Water Heating w/storage back up | Each | - | - | - | - | $ - | 0% |
| Replace with Solar Water Heating w/tankless back up | Each | - | - | - | - | $ - | 0% |
| Replace with Tankless Water Heater | Each | 23 | - | - | 1,875.18 | $ 113,410 | 6% |
| Thermostatic Shower Valve | Each | 198 | 2,515 | 0.19 | 1,282.03 | $ 11,644 | 1% |
| Thermostatic Tub Spout/Diverter | Each | 2 | 28 | - | 2.60 | $ 110 | 0% |
| Water Heater - Repair water leak - NTE $300 | T&M | - | - | - | - | $ - | 0% |
| Water Heater Blanket | Each | - | - | - | - | $ - | 0% |
| Water Heater Pipe Insulation | Each | 38 | - | - | (16.88) | $ 1,086 | 0% |
| **Enclosure** | | | | | | | |
| Attic Cover Replacement | Each | - | - | - | - | $ - | 0% |
| Attic Insulation, Add R-11 | Per Square | 11,000 | 1,533 | - | 66.56 | $ 22,550 | 1% |
| Attic Insulation, Add R-19 | Per Square | 39,181 | 7,152 | - | 409.99 | $ 78,166 | 4% |
| Attic Insulation, Add R-30 | Per Square | 21,667 | 11,016 | - | 493.87 | $ 46,583 | 3% |
| Attic Insulation, Add R-38 | Per Square | 12,548 | 7,949 | - | 710.28 | $ 27,022 | 1% |
| Attic Insulation, Add R-49 | Per Square | 1,320 | 24 | - | 97.91 | $ 3,102 | 0% |
| Caulking | Per Linear | - | - | - | - | $ - | 0% |
| Cover Plate Gaskets | Per Home | - | - | - | - | $ - | 0% |
| Duct Sealing - 120 Minutes | Per System | 95 | 26,305 | - | 260.70 | $ 35,280 | 2% |
| Duct Sealing - 60 Minutes | Per System | - | - | - | - | $ - | 0% |
| Duct Sealing - 90 Minutes | Per System | - | - | - | - | $ - | 0% |
| Floor Insulation, Add R-19 | Per Square | - | - | - | - | $ - | 0% |
| Glass Replacement | Per Square | - | - | - | - | $ - | 0% |
| High Efficiency Windows | Per Square | 3,783 | 22,075 | - | 195.65 | $ 213,184 | 12% |
| High-Performance Cool Roofs | Per Square | - | - | - | - | $ - | 0% |
| Insulated Exterior Doors | Per Door | 1 | 4 | - | 7.59 | $ 650 | 0% |
| Kitchen Exhaust Dampers | Each | - | - | - | - | $ - | 0% |
| Minor Home / Envelop Repairs - NTE $600 | T&M | 14 | 52 | - | 0.75 | $ 2,681 | 0% |
| Prescriptive Duct Sealing (No HVAC Replacement) | Per System | - | - | - | - | $ - | 0% |
| Radiant Barriers | Per Square | - | - | - | - | $ - | 0% |
| Room AC/Evaporative Cooler Cover | Each | - | - | - | - | $ - | 0% |
| Wall Insulation, Add R-13 | Per Square | - | - | - | - | $ - | 0% |
| Weather-stripping | Per Linear | 3,111 | 2,543 | - | 802.22 | $ 18,295 | 1% |
| Window Film (Tint) | Per Square | - | - | - | - | $ - | 0% |
| **HVAC** | | | | | | | |
| Duct Insulation (R-6) | Per Linear | - | - | - | - | $ - | 0% |
| Duct Repair | Each | - | - | - | - | $ - | 0% |
| Duct Replacement | Per Linear | 65 | - | - | - | $ 593 | 0% |
| Duct Test - Title 24 or to perform duct sealing | Per System | 132 | - | - | - | $ 20,510 | 1% |
| ECM Blower Motor | Each | 1 | 252 | (1.40) | - | $ 630 | 0% |
| Efficient Fan Controller | Each | 45 | 11,762 | 11.34 | - | $ 12,315 | 1% |
| HE Wall Furnace 82% AFUE | Each | - | - | - | - | $ - | 0% |
| HVAC System - Filter Replacement (No HVAC | Each | 75 | 629 | 0.28 | 26.61 | $ 4,928 | 0% |
| HVAC Tune-up | Each | 16 | 838 | 0.93 | - | $ 6,355 | 0% |
| Mobile Home Split System, 2 TON 16 SEER/60 KBTU | Each | - | - | - | - | $ - | 0% |
| Mobile Home Split System, 2 TON 16 SEER/75 KBTU | Each | - | - | - | - | $ - | 0% |
| Mobile Home Split System, 3 TON 16 SEER/60 KBTU | Each | - | - | - | - | $ - | 0% |
| Mobile Home Split System, 3 TON 16 SEER/75 KBTU | Each | - | - | - | - | $ - | 0% |
| Mobile Home Split System, 4 TON 16 SEER/72 KBTU | Each | - | - | - | - | $ - | 0% |
| Replace FAU with HE FAU, 100 KBTU 95% AFUE | Each | 1 | - | - | 2.59 | $ 6,060 | 0% |
| Replace FAU with HE FAU, 40 KBTU 95% AFUE | Each | - | - | - | - | $ - | 0% |
| Replace FAU with HE FAU, 60 KBTU 95% AFUE | Each | 3 | 5 | - | 163.29 | $ 15,720 | 1% |
| Replace FAU with HE FAU, 80 KBTU 95% AFUE | Each | 1 | (0) | - | 18.11 | $ 5,925 | 0% |
| Replace Package G/E with 16+ SEER/80%+ AFUE - 2 1/2 | Each | 1 | 2,256 | - | 1.06 | $ 9,555 | 1% |
| Replace Package G/E with 16+ SEER/80%+ AFUE - 2 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Package G/E with 16+ SEER/80%+ AFUE - 3 1/2 | Each | - | - | - | - | $ - | 0% |
| Replace Package G/E with 16+ SEER/80%+ AFUE - 3 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Package G/E with 16+ SEER/80%+ AFUE - 4 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Package G/E with 16+ SEER/80%+ AFUE - 5 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Package HP with 16+ SEER/8.5+ HSPF - 2 1/2 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Package HP with 16+ SEER/8.5+ HSPF - 2 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Package HP with 16+ SEER/8.5+ HSPF - 3 1/2 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Package HP with 16+ SEER/8.5+ HSPF - 3 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Package HP with 16+ SEER/8.5+ HSPF - 4 Ton | Each | 1 | 501 | - | (2.27) | $ 9,650 | 1% |
| Replace Package HP with 16+ SEER/8.5+ HSPF - 5 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Split AC Only with 16+ SEER - 2 1/2 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Split AC Only with 16+ SEER - 2 Ton | Each | 1 | 1,422 | - | - | $ 5,525 | 0% |
| Replace Split AC Only with 16+ SEER - 3 1/2 Ton | Each | 17 | 38,652 | - | 188.89 | $ 107,370 | 6% |
| Replace Split AC Only with 16+ SEER - 3 Ton | Each | 26 | 44,309 | - | - | $ 151,540 | 8% |
| Replace Split AC Only with 16+ SEER - 4 Ton | Each | 15 | 33,494 | - | 7.49 | $ 98,610 | 5% |
| Replace Split AC Only with 16+ SEER - 5 Ton | Each | 20 | 60,009 | - | 4.61 | $ 133,480 | 7% |
| Replace Split HP System with 16+ SEER/8.8+ HSPF - 2 1/2 | Each | 2 | 5,303 | - | 1.64 | $ 16,100 | 1% |
| Replace Split HP System with 16+ SEER/8.8+ HSPF - 2 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Split HP System with 16+ SEER/8.8+ HSPF - 3 1/2 | Each | - | - | - | - | $ - | 0% |
| Replace Split HP System with 16+ SEER/8.8+ HSPF - 3 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Split HP System with 16+ SEER/8.8+ HSPF - 4 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Split HP System with 16+ SEER/8.8+ HSPF - 5 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Split System with 16+ SEER/95%+ AFUE - 2 1/2 | Each | - | - | - | - | $ - | 0% |
| Replace Split System with 16+ SEER/95%+ AFUE - 2 Ton | Each | - | - | - | - | $ - | 0% |
| Replace Split System with 16+ SEER/95%+ AFUE - 3 1/2 Ton | Each | 14 | 36,500 | - | 55.56 | $ 119,131 | 6% |
| Replace Split System with 16+ SEER/95%+ AFUE - 3 Ton | Each | 8 | 17,248 | - | 26.03 | $ 69,351 | 4% |
| Replace Split System with 16+ SEER/95%+ AFUE - 4 Ton | Each | 6 | 13,398 | - | 182.52 | $ 57,900 | 3% |
| Replace Split System with 16+ SEER/95%+ AFUE - 5 Ton | Each | 5 | 15,924 | - | 63.60 | $ 49,250 | 3% |
| Smart Thermostat | Each | 34 | 4,998 | - | 222.68 | $ 6,565 | 0% |
| **Maintenance** | | | | | | | |
| CO/Smoke Alarm Combo | Each | 4 | - | - | - | $ 324 | 0% |
| Comprehensive Home Health and Safety Check-up | Per Home | 111 | - | - | - | $ 8,979 | 0% |
| Furnace Clean and Tune | Each | 77 | - | - | - | $ 5,866 | 0% |
| Range Hood | Each | - | - | - | - | $ - | 0% |
| Smoke Alarm | Each | 9 | - | - | - | $ 464 | 0% |
| **Lighting** | | | | | | | |
| Exterior LED Security Light (photocell and motion sensor) | Each | - | - | - | - | $ - | 0% |
| LED Fixtures - Exterior | Each | - | - | - | - | $ - | 0% |
| LED Fixtures - Interior | Each | - | - | - | - | $ - | 0% |
| LED Lamps - 40w Equivalent | Each | - | - | - | - | $ - | 0% |
| LED Lamps - 60w Equivalent | Each | 854 | 31,936 | - | (148.61) | $ 10,248 | 1% |
| **Miscellaneous** | | | | | | | |
| Energy Star Qualified Variable Speed Pool pumps | Each | - | - | - | - | $ - | 0% |
| Home Energy Monitor | Each | - | - | - | - | $ - | 0% |
| Tier 2 Smart Power Strips | Each | - | - | - | - | $ - | 0% |
| Vacancy Sensors | Each | - | - | - | - | $ - | 0% |
| **Permitting Fees** | | | | | | | |
| Permits | Each | 116 | - | - | 0.00 | $ 31,575 | 2% |

| Customer Enrollment | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| ESA WH Outreach & Assessment | Home | 23 | | | | $ 4,800 | 4% | | | |
| ESA WH In-Home Energy Education | Home | - | | | | $ - | 0% | | | |
| | | | | | | | | | | |
| **Total Savings/Expenditures** | | | **18,728** | **11.75** | **974** | **$ 119,188** | **100%** | | **$ 82,441** | |

| Customer Enrollment | | | | | | | |
|---|---|---|---|---|---|---|---|
| ESA WH Outreach & Assessment | Home | 119 | | | | $ 23,440 | 1% |
| ESA WH In-Home Energy Education | Home | - | | | | $ - | 0% |
| | | | | | | | |
| **Total Savings/Expenditures** | | | **454,136** | **20** | **9,005** | **$ 1,840,447** | **100%** |

| Households Treated | | Total |
|---|---|---|
| - Single Family Households Treated | Home | 19 |
| - Mobile Homes Treated | Home | 4 |
| **Total Number of Households Treated** | Home | 23 |

| Households Treated | | Total |
|---|---|---|
| - Single Family Households Treated | Home | 110 |
| - Mobile Homes Treated | Home | 9 |
| **Total Number of Households Treated** | Home | 119 |

| | Year to Date Expenses | | |
|---|---|---|---|
| **ESA Program - Pilot Plus and Pilot Deep** | **Electric** | **Gas** | **Total** |
| **Administration [1]** | $ 443,531 | $ 345,723 | $ 789,254 |
| **Direct Implementation (Non-Incentive) [2]** | $ 349,638 | $ 349,638 | $ 699,276 |
| **Direct Implementation [3]** | $ 1,824,581 | $ 1,085,948 | $ 2,910,529 |
| | | | |
| **TOTAL Pilot Plus and Pilot Deep COSTS** | **$ 2,617,750** | **$ 1,781,308** | **$ 4,399,058** |

*<<Includes measures costs*

| | Year to Date Expenses | | |
|---|---|---|---|
| **ESA Program - Pilot Plus and Pilot Deep** | **Electric** | **Gas** | **Total** |
| **Inspections** | $ 54,249 | $ 54,249 | $ 108,498 |
| **Marketing and Outreach** | $ 107,818 | $ 107,818 | $ 215,636 |
| **General Administration** | $ 111,084 | $ 13,276 | $ 124,360 |
| **Direct Implementer -- ADMIN** | $ 349,638 | $ 349,638 | $ 699,276 |
| **EM&V Studies** | $ 137,730 | $ 137,730 | $ 275,460 |
| **Direct Installation -- Materials** | $ 906,690 | $ 477,026 | $ 1,383,716 |
| **Performance Incentive** | $ 701,935 | $ 363,935 | $ 1,065,870 |
| **Home Audit; Test-In Test-Out** | $ 212,885 | $ 220,533 | $ 433,417 |
| **Remediation & Mitigation** | $ 3,072 | $ 24,454 | $ 27,526 |
| **WE&T** | $ 32,650 | $ 32,650 | $ 65,300 |
| **Total** | **$ 2,617,750** | **$ 1,781,308** | **$ 4,399,058** |

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

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

[3] Direct Implementation includes expenses for measures delivery.

**ESA Table 2C - ESA Building Electrification (SCE only) Expenses and Energy Savings by Measures Installed**
**Southern California Edison**
**Program Year 2025 Annual Report**

| Measures | Units | ESA Program - Building Electrification Retrofit Pilot[1] Year-To-Date Completed & Expensed Installation | | | | | | Effective Useful Life (years) | 2025 Total Measure Life Cycle Bill Savings |
|---|---|---|---|---|---|---|---|---|---|
| | | Quantity Installed | kWh (Annual)[2] | kW (Annual) | Therms (Annual) | Expenses ($) | % of Expenditure | | |
| **Appliances** | | | | | | | | | |
| Electric Dryer | Each | 111 | (33,866) | - | 1,680 | $ 148,906 | 1.4% | 12 | $46,350 |
| Heat Pump Dryer | Each | 7 | (1,603) | - | 102 | $ 14,631 | 0.1% | 12 | $4,182 |
| Induction Cooktop | Each | 10 | (899) | - | 57 | $ 18,690 | 0.2% | 16 | $3,103 |
| Induction Range | Each | 87 | (18,009) | - | 1,244 | $ 188,367 | 1.7% | 16 | $74,202 |
| **Domestic Hot Water** | | | | | | | | | |
| Heat Pump Water Heater | Each | 351 | (436,490) | - | 59,581 | $ 1,823,913 | 16.9% | 20 | $6,585,343 |
| **Enclosure** | | | | | | | | | |
| Attic Insulation | Home | 132 | 76,997 | 44 | 8 | $ 471,526 | 4.4% | 30 | $582,702 |
| **HVAC** | | | | | | | | | |
| Heat Pump HVAC | Each | 367 | (232,388) | - | 58,099 | $ 5,054,551 | 46.8% | 23 | $8,502,580 |
| Duct Seal | Each | 299 | - | - | - | $ 117,168 | 1.1% | - | $0 |
| Smart Thermostat | Each | 190 | 5,827 | - | - | $ 60,175 | 0.6% | 9 | $13,336 |
| **Miscellaneous**[3] | | | | | | | | | |
| Minor Home Repair | Home | 321 | | | | $ 1,178,498 | 10.9% | - | $0 |
| Carbon Monoxide/Smoke Alarm | Each | 1,325 | | | | $ 109,094 | 1.0% | - | $0 |
| Electric Panel | Each | 144 | | | | $ 505,400 | 4.7% | - | $0 |
| Electric Sub-Panel | Each | 35 | | | | $ 66,090 | 0.6% | - | $0 |
| Electrical Circuit Run | Each | 838 | | | | $ 880,440 | 8.2% | - | $0 |
| Induction Cookware | Home | 96 | | | | $ 14,869 | 0.1% | - | $0 |
| **Customer Enrollment** | | | | | | | | | |
| Energy Assessment | Home | 350 | | | | $ 144,565 | 1.3% | - | $0 |
| | | | | | | | | | |
| **Total Savings/Expenditures** | | | **(640,431)** | **44** | **120,771** | **$ 10,796,883** | **100%** | | **$15,811,797** |
| **Claimable kWh Savings**[4] | | | **2,898,159** | | | | | | |

| Households Treated | | Total |
|---|---|---|
| Single Family Households Treated | Home | 350 |
| Estimated Avg. Annual Bill SavingsTreated [5] | Home | $ 467 |

| ESA Program - Building Electrification | Year to Date Expenses | | |
|---|---|---|---|
| | Electric | Gas | Total |
| **Administration** | $ 431,629 | | $ 431,629 |
| **Direct Implementation (Non-Incentive)**[6] | $ 310,898 | | $ 310,898 |
| **Direct Implementation**[7] | $ 12,821,890 | | $ 12,821,890 |
| | | | |
| **TOTAL Building Electrification COSTS** | $ 13,564,417 | $ - | $ 13,564,417 |

*<<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, building permits, and thermostat

[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 reconcilation to reflect actual expenditures of the 2025 reported homes treated and installed measures.

# ESA Table 2D - Clean Energy Homes New Construction Pilot
## Southern California Edison
## Program Year 2025 Annual Report

| ESA CEH Program Offerings | Units | 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 | 954 | | |
| Interest Form denied | Homes | 0 | 0 | 11 | 539 | | |
| Application for direct design assistance **(in progress)** | Homes | 0 | 0 | 0 | 0 | $ - | 0% |
| Application for direct design assistance **(completed)** | Homes | 0 | 0 | 0 | 0 | $ - | 0% |
| Applications for design incentive **(in progress)** [3] | Homes | 0 | 0 | 1 | | $ 50,000 | 1.32% |
| Applications for design incentive **(completed)** | Homes | 0 | 0 | 0 | 0 | $ - | 0% |
| Applications for tenant education incentive **(in progress)**[4] | Homes | 0 | 0 | 2 | 246 | $ 10,723 | 0.28% |
| Applications for tenant education incentive **(completed)** | Homes | 0 | 0 | 0 | 0 | $ - | 0% |
| | | | | | | | |
| **Total Savings/Expenditures** | | | | | | $ 60,723 | 1.60% |
| | | | | | | | |

[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. No new applications will be received in 2025 due to the ramp down of CEH. All marketing and outreach activities have ceased.

[3] The ($) amount for DI is $50K for each project. One project have incentive totals to $50k.

[4] The ($) amount for the TE incentive maximum incentive is $25K for each project. Two projects have incentives totals to estimated at $30k.The Implementer provided direct work on some TE work which lowered the incentive amount. The table was adjusted for the actual amount of $10,723 in November 2025.

| ESA CEH Outreach and Education | Units | Monthly Total | YTD Total |
|---|---|---|---|
| Webinars | Number of webinars | 0 | 0 |
| Active leads | developer | 0 | 0 |

*In 2025 all marketing and outreach activities have ceased. No new webinars, active leads or non-active leads will be tracked.

| Design Assistance Completed Applications | Units | Quantity | Compliance Margin Designed kWh (Annual)* | Compliance Margin Designed BTU (Annual)* | Avoided CO2 Emissions | Estimated Incentive Expenses ($) |
|---|---|---|---|---|---|---|
| Direct Design Assistance | Living Units | 0 | | | | $ - |
| Design Incentive | Living Units | 9 | | | | $ 50,000 |
| **Total Savings/Expenditures** | | | | | | $ 50,000 |

| | Year to Date Expenses | | |
|---|---|---|---|
| ESA Program - Clean Energy Homes | Electric | Gas | Total |
| **Administration** | $ 161,484 | $ - | $ 161,484 |
| **Direct Implementation (Non-Incentive)** | $ 64,479 | $ - | $ 64,479 |
| **Direct Implementation** | $ 60,723 | $ - | $ 60,723 |
| | | | |
| **TOTAL Clean Energy Homes COSTS** | $ 286,686 | $ - | $ 286,686 |

*<<Includes measures costs*

**ESA Table 2E - ESA CSD Leveraging Expenses and Energy Savings by Measures Installed**
**Southern California Edison**
**Program Year 2025 Annual Report**

| | | ESA Program - CSD Leveraging | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | Year-To-Date Completed & Expensed Installation | | | | | | | |
| **Measures** | **Units** | **Quantity Installed** | **kWh (Annual)** | **kW (Annual)** | **Therms (Annual)** | **Expenses ($)** | **% of Expenditure** | **Effective Useful Life (years)** | **2025 Total Measure Life Cycle Bill Savings** |
| **Appliances** | | | | | | | | | |
| Clothes Dryer | Each | | | | | | 0.0% | | |
| Dish Washer | Each | | | | | | 0.0% | | |
| Freezer | Each | | | | | | 0.0% | | |
| High Efficiency Clothes Washer | Each | | | | | | 0.0% | | |
| Induction Cooking Appliance-FS - New | Each | | | | | | 0.0% | | |
| Microwave | Each | | | | | | 0.0% | | |
| Refrigerator | Each | | | | | | 0.0% | | |
| **Domestic Hot Water** | | | | | | | | | |
| Combined Showerhead/TSV | Home | | | | | | 0.0% | | |
| Faucet Aerator | Each | | | | | | 0.0% | | |
| Heat Pump Water Heater | Each | | | | | | 0.0% | | |
| Heat Pump Water Heater - Electric | Each | | | | | | 0.0% | | |
| Heat Pump Water Heater - Gas | Each | | | | | | 0.0% | | |
| Heat Pump Water Heater - Propane | Each | | | | | | 0.0% | | |
| Low-Flow Showerhead | Home | | | | | | 0.0% | | |
| Solar Water Heating | Home | | | | | | 0.0% | | |
| Other Domestic Hot Water | Home | | | | | | 0.0% | | |
| Tankless Water Heater | Each | | | | | | 0.0% | | |
| Thermostatic Shower Valve | Each | | | | | | 0.0% | | |
| Thermostatic Shower Valve Combined Showerhead | Each | | | | | | 0.0% | | |
| Thermostatic Tub Spout/Diverter | Each | | | | | | 0.0% | | |
| Water Heater Repair/Replacement | Each | | | | | | 0.0% | | |
| Water Heater Tank and Pipe Insulation | Each | | | | | | 0.0% | | |
| **Enclosure** | | | | | | | | | |
| Air Sealing | Home | | | | | | 0.0% | | |
| Attic Insulation | Home | | | | | | 0.0% | | |
| Attic Insulation CAC NonElect Heat - New | Home | | | | | | 0.0% | | |
| Caulking | Home | | | | | | 0.0% | | |
| Diagnostic Air Sealing | Home | | | | | | 0.0% | | |
| Floor Insulation | Home | | | | | | 0.0% | | |
| Minor Home Repairs | Home | | | | | | 0.0% | | |
| **HVAC** | | | | | | | | | |
| Central A/C replacement | Each | | | | | | 0.0% | | |
| Central Heat Pump-FS (propane or gas space) | Home | | | | | | 0.0% | | |
| Duct Test and Seal | Each | | | | | | 0.0% | | |
| Energy Efficient Fan Control | Each | | | | | | 0.0% | | |
| Evaporative Cooler (Installation) | Each | | | | | | 0.0% | | |
| Evaporative Cooler (Replacement) | Each | | | | | | 0.0% | | |
| Furnace Repair/Replacement | Home | | | | | | 0.0% | | |
| Heat Pump Replacement | Home | | | | | | 0.0% | | |
| Heat Pump Replacement - CAC Gas - New | Home | | | | | | 0.0% | | |
| Heat Pump Replacement - CAC Propane - New | Home | | | | | | 0.0% | | |
| High Efficiency Forced Air Unit (HE FAU) | Home | | | | | | 0.0% | | |
| High Efficiency Forced Air Unit (HE FAU) - Early Replacen | Home | | | | | | 0.0% | | |
| High Efficiency Forced Air Unit (HE FAU) - On Burnout | Home | | | | | | 0.0% | | |
| Portable A/C | Each | | | | | | 0.0% | | |
| Prescriptive Duct Sealing | Home | | | | | | 0.0% | | |
| Removed - A/C Time Delay | Each | | | | | | 0.0% | | |
| Removed - FAU Standing Pilot Conversion | Each | | | | | | 0.0% | | |
| Room A/C Replacement | Home | | | | | | 0.0% | | |
| Smart Thermostat | Home | | | | | | 0.0% | | |
| Wholehouse Fan | Each | | | | | | 0.0% | | |
| **Maintenance** | | | | | | | | | |
| Central A/C Tune up | Home | | | | | | 0.0% | | |
| Furnace Clean and Tune | Home | | | | | | 0.0% | | |
| HVAC Air Filter Service | Each | | | | | | 0.0% | | |
| Condenser Coil Cleaning - New | Each | | | | | | 0.0% | | |
| Evaporative Cooler - Maint Functioning - New | Each | | | | | | 0.0% | | |
| Evaporative Cooler - Maint Non-Functioning - New | Each | | | | | | 0.0% | | |
| Evaporative Cooler Maintenance | Home | | | | | | 0.0% | | |
| Evaporator Coil - New | Each | | | | | | 0.0% | | |
| Fan Control Adjust - New | Each | | | | | | 0.0% | | |
| Range Hood | Home | | | | | | 0.0% | | |
| Refrigerant Charge Adjustment - New | Each | | | | | | 0.0% | | |
| **Lighting** | | | | | | | | | |
| Exterior Hard wired LED fixtures | Each | | | | | | 0.0% | | |
| LED A-Lamps | Each | | | | | | 0.0% | | |
| LED R/BR Lamps | Each | | | | | | 0.0% | | |
| Removed - Interior Hard wired LED fixtures | Each | | | | | | 0.0% | | |
| Removed - LED Night Light | Each | | | | | | 0.0% | | |
| Removed - LED Torchiere | Each | | | | | | 0.0% | | |
| Removed - Occupancy Sensor | Each | | | | | | 0.0% | | |
| **Miscellaneous** | | | | | | | | | |
| Air Purifier | Home | | | | | | 0.0% | | |
| CO and Smoke Alarm | Each | | | | | | 0.0% | | |
| Cold Storage | Home | | | | | | 0.0% | | |
| Comprehensive Home Health and Safety Check-up | Each | | | | | | 0.0% | | |
| Pool Pumps | Each | | | | | | 0.0% | | |
| Smart Strip | Each | | | | | | 0.0% | | |
| Smart Strip Tier II | Each | | | | | | 0.0% | - | - |
| **Pilots** | | | | | | | | | |
| | | | | | | | | | |
| **Customer Enrollment** | | | | | | | | | |
| Outreach & Assessment | Home | | | | | | 0.0% | | |
| In-Home Education | Home | | | | | | 0.0% | | |
| | | | | | | | | | |
| **Total Savings/Expenditures** | | | - | - | - | $ - | **0.0%** | | $ - |
| | | | | | | | | | |
| Total Households Weatherized | | | | | | | | | |
| | | | | | | | | | |

| **CSD MF Buildings Treated** | | | **Total** |
|---|---|---|---|
| | | | |
| - Multifamily | | | 0 |
| | | | |

| **ESA Program - CSD Leveraging** | **Year to Date Expenses** | | | |
|---|---|---|---|---|
| | **Electric** | **Gas** | **Total** | |
| **Administration** | | | $ - | |
| **Direct Implementation (Non-Incentive)** | | | $ - | |
| **Direct Implementation** | | | $ - | *<<Includes measures costs* |
| | | | | |
| **TOTAL CSD Leveraging COSTS** | $ - | $ - | $ - | |

[1] From ED: Add footnote in Table 2 series to explain that savings for HVAC measures vary by CZ and is averaged in these tables

**ESA Table 3 - Program Cost Effectiveness**
**Southern California Edison**
**Program Year 2025 Annual Report**

| Program | Ratio of Benefits Over Costs | | | | | | |
|---|---|---|---|---|---|---|---|
| | ESACET | Resource Test | TRC | PAC | RIM | SCT Base | SCT High |
| **ESA Main (SF, MH)** | 0.56 | 0.58 | 0.35 | 0.35 | 0.19 | 0.48 | 0.50 |
| **MFWB (In-Unit, CAM/WB)** | 0.53 | 0.50 | 0.24 | 0.24 | 0.15 | 0.34 | 0.36 |
| **ESA Pilot Plus and Pilot Deep** | 0.24 | 0.49 | 0.19 | 0.19 | 0.14 | 0.28 | 0.28 |
| **Building Electrification** | 0.33 | 0.27 | 0.17 | 0.17 | 0.16 | 0.27 | 0.27 |

Notes:

* All program measures, including resource and non-resource measures, are represented in the ESACET. Only measures considered resource measures are represented in the Resource Test. Resource measures, as defined in D.21-06-015, include any measure with a unit savings of less than one kWh or one therm.
* The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs.
* The Resource Test includes energy benefits and program measure and installation costs.
* Energy Division instructed the IOUs to use the results of the PY2015 to 2017 ESA Impact Evaluation for their 2019 and 2020 savings estimates. This does not apply to ESA CAM. ESA CAM savings estimates are based on approved workpapers.
* Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC (renamed the Resource Test).

**ESA Table 4 - ESA Detail by Housing Type and Source[1]**
**Southern California Edison**
**Program Year 2025 Annual Report**

| | | 2025 Energy Savings[2] | | | | |
|---|---|---|---|---|---|---|
| **Customer** | **Housing Type** | **# Homes /Properties Treated** | **(mWh)** | **MW** | **(mTherm)** | **2025 Expenses** |
| **Gas and Electric Customers** | | | | | | |
| **Owners - Total** | | **-** | **-** | **-** | **-** | **$ -** |
| | **Single Family** | | | | | |
| | **Multi Family** | | | | | |
| | **Mobile Homes** | | | | | |
| **Renters - Total** | | **-** | **-** | **-** | **-** | **$ -** |
| | **Single Family** | | | | | |
| | **Multi Family** | | | | | |
| | **Mobile Homes** | | | | | |
| | | | | | | |
| **Electric Customers (only)** | | | | | | |
| **Owners - Total** | | **29,468** | **10,831** | **1.71** | **94.22** | **$ 36,869,503** |
| | **Single Family** | 25,921 | 9,637 | 1.54 | 100.10 | $ 33,959,251 |
| | **Multi Family** | - | - | | - | |
| | **Mobile Homes** | 3,547 | 1,193 | 0.17 | -5.88 | $ 2,910,252 |
| **Renters - Total** | | **25,730** | **8,721** | **1.37** | **-90.59** | **$ 15,090,615** |
| | **Single Family** | 23,527 | 7,952 | 1.25 | -84.22 | $ 13,858,058 |
| | **Multi Family** | - | | | | |
| | **Mobile Homes** | 2,203 | 769 | 0.12 | -6.37 | $ 1,232,557 |
| **ESA Multifamily Whole Building** | | **9,927** | **3,315** | **0.37** | **11.21** | **$ 6,471,296** |
| | **In-Unit** | 9,894 | 3,160 | 0.34 | 8.24 | $ 4,619,757 |
| | **CAM/WB** | 33 | 155 | 0.03 | 2.97 | $ 1,851,539 |
| **Totals:** | | **65,125** | **22,866** | **3.45** | **14.84** | **$ 58,431,414** |

[1] Summary data which includes ESA Main Program (SF, MH)

[2] Savings estimates for ESA treated homes are sourced from the PY 2015 to 2017 ESA Impact Evaluation.

| Year | Utility in Shared Service Territory | Eligible Households in Shared Service Territory | Eligible Households Treated by Both Utilities in Shared Service Territory |
|---|---|---|---|
| **2025** | PG&E | 6,914 | 0 |
| **2025** | SDG&E | 0 | 0 |
| **2025** | SoCalGas | 1,314,269 | 12,255 |

**ESA Table 5 - ESA Direct Purchases & Installation Contractors**
**Southern California Edison**
**Program Year 2025 Annual Report**

| Contractor | County | Contractor Type | | | | 2025 Annual Expenditures |
|---|---|---|---|---|---|---|
| | | Private | CBO | WMDVBE | LIHEAP | |
| Contractor 1 | 3,10 | x | | x | | $ 1,134,947 |
| Contractor 2 | 4,7,8,9,11 | | x | x | | $ 3,736,695 |
| Contractor 3 | All | x | | | | $ 1,499,840 |
| Contractor 4 | 4, 6, 7, 8 | x | | | | $ 1,741,713 |
| Contractor 5 | 1,2,3,4,5,8,9,10,11 | | x | | | $ 7,600,655 |
| Contractor 6 | 4 | | x | x | x | $ 9,652,627 |
| Contractor 7 | 4,9,11 | | x | x | x | $ 2,599,740 |
| Contractor 8 | 2,4,8,10 | x | | x | | $ 9,609,726 |
| Contractor 9 | 2,3,10 | x | | | | $ 3,466,306 |
| Contractor 10 | 4,8 | x | | x | | $ 2,662,938 |
| Contractor 11 | All | x | | x | | $ 12,907,912 |
| Contractor 12 | 4,7,8,12 | x | | x | | $ 2,797,042 |
| Contractor 13 | 4,6 | x | | | | $ 1,135,119 |
| Contractor 14 | 4,6 | | x | | | $ 275,955 |
| **Total Contractor Expenditures** | | | | | | **$ 60,821,214** |

[1] Summary data includes ESA Main Program (SF and MH).

1 Inyo
2 Kern
3 Kings
4 Los Angeles
5 Mono
6 Orange
7 Riverside
8 San Bernardino
9 Santa Barbara
10 Tulare
11 Ventura
12 Fresno
13 Service clients from within the organization
14 Service SCG customers only

**ESA Table 6 - ESA Installation Cost of Program Installation Contractors [1]**
**Southern California Edison**
**Program Year 2025 Annual Report**

| | Unit of Measure | CBO/WMDVBE | | | | | | NON - CBO/WMDVBE | | | | | | 2025 Program Total | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Installations | | Dwellings | | Costs | | Installations | | Dwellings | | Costs | | | | | | Cost/ |
| | | Units | % | Units | % | $ | % | Units | % | Units | % | $ | % | Units Installed | Installations | Costs | Cost/ Unit | Household |
| Dwellings | Each | 277,207 | 94% | | | $44,095,674 | 89% | 16,266 | 6% | | | $ 5,189,604 | 11% | 293,473 | 55,198 | $ 49,285,279 | $ 167.94 | $ 893 |
| **Appliances** | | | | | | | | | | | | | | | | | | |
| Clothes Dryer | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Dishwasher | Each | 36 | 90% | 36 | 90% | $ 27,443 | 90% | 4 | 0% | 4 | 0% | $ 3,106 | 10% | 40 | 40 | $ 30,549 | $ 764 | $ 19 |
| Freezer | Each | 2,175 | 86% | 2,147 | 86% | $ 2,638,160 | 86% | 361 | 0% | 359 | 0% | $ 425,813 | 14% | 2,536 | 2,506 | $ 3,063,973 | $ 1,208 | $ 0 |
| High Efficiency Clothes Washer | Home | 30 | 83% | 30 | 83% | $ 33,148 | 82% | 6 | 0% | 6 | 0% | $ 7,340 | 18% | 36 | 36 | $ 40,489 | $ 1,125 | $ 31 |
| Induction Cooking Appliance-FS | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Microwave | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Refrigerator | Home | 10,575 | 85% | 9,817 | 84% | $14,418,602 | 84% | 1,931 | 0% | 1,818 | 0% | $ 2,667,329 | 16% | 12,506 | 11,635 | $ 17,085,931 | $ 1,366 | $ 0 |
| **Domestic Hot Water** | 0 | | | | | | | | | | | | | | | | | |
| Combined Showerhead/TSV | Each | 182 | 100% | 118 | 100% | $ 8,624 | 100% | - | 0% | - | 0% | $ - | 0% | 182 | 118 | $ 8,624 | $ 47 | $ 0 |
| Faucet Aerator | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Heat Pump Water Heater | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Heat Pump Water Heater - Electric | Each | 337 | 79% | 337 | 79% | $ 1,881,245 | 79% | 91 | 0% | 91 | 0% | $ 501,064 | 21% | 428 | 428 | $ 2,382,309 | $ 5,566 | $ 13 |
| Heat Pump Water Heater - Gas | Each | 1,430 | 99% | 1,428 | 99% | $ 9,811,523 | 100% | 8 | 0% | 8 | 0% | $ 36,133 | 0% | 1,438 | 1,436 | $ 9,847,656 | $ 6,848 | $ 5 |
| Heat Pump Water Heater - Propane | Each | 7 | 100% | 7 | 100% | $ 50,871 | 100% | - | 0% | - | 0% | $ - | 0% | 7 | 7 | $ 50,871 | $ 7,267 | $ 1,038 |
| Low-Flow Showerhead | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Solar Water Heating | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Other Domestic Hot Water | Home | 132 | 99% | 65 | 98% | $ 1,310 | 99% | 2 | 0% | 1 | 0% | $ 20 | 1% | 134 | 66 | $ 1,330 | $ 10 | $ 0 |
| Tankless Water Heater | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Thermostatic Shower Valve | Each | 45 | 100% | 33 | 100% | $ 2,298 | 100% | - | 0% | - | 0% | $ - | 0% | 45 | 33 | $ 2,298 | $ 51 | $ 2 |
| Thermostatic Shower Valve Combined Showerhead | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Thermostatic Tub Spout/Diverter | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Water Heater Repair | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Water Heater Replacement | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Water Heater Tank and Pipe Insulation | Home | 34 | 100% | 34 | 100% | $ 2,791 | 100% | - | 0% | - | 0% | $ - | 0% | 34 | 34 | $ 2,791 | $ 82 | $ 2 |
| **Enclosure** | | | | | | | | | | | | | | | | | | |
| Air Sealing | Home | 193 | 97% | 43 | 98% | $ 5,310 | 88% | 6 | 0% | 1 | 0% | $ 739 | 12% | 199 | 44 | $ 6,049 | $ 30 | $ 1 |
| Attic Insulation | Home | 2,893 | 100% | 8 | 100% | $ 19,739 | 100% | - | 0% | - | 0% | $ - | 0% | 2,893 | 8 | $ 19,739 | $ 7 | $ 1 |
| Attic Insulation CAC NonElect Heat | Home | 380 | 100% | 3 | 100% | $ 3,685 | 100% | - | 0% | - | 0% | $ - | 0% | 380 | 3 | $ 3,685 | $ 10 | $ 3 |
| Caulking | Home | 9 | 100% | 5 | 100% | $ 187 | 100% | - | 0% | - | 0% | $ - | 0% | 9 | 5 | $ 187 | $ 21 | $ 4 |
| Diagnostic Air Sealing | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Floor Insulation | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Minor Home Repairs | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| **HVAC** | | | | | | | | | | | | | | | | | | |
| Central A/C Replacement | Home | 698 | 92% | 431 | 88% | $ 3,061,251 | 89% | 61 | 0% | 59 | 0% | $ 368,785 | 11% | 759 | 490 | $ 3,430,036 | $ 4,519 | $ 9 |
| Central Heat Pump-FS (propane or gas space) | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Duct Test and Seal | Home | 1,017 | 84% | 520 | 84% | $ 233,582 | 81% | 190 | 0% | 97 | 0% | $ 55,538 | 19% | 1,207 | 617 | $ 289,120 | $ 240 | $ 0 |
| Energy Efficient Fan Control | Home | 3 | 100% | 3 | 100% | $ 1,396 | 100% | - | 0% | - | 0% | $ - | 0% | 3 | 3 | $ 1,396 | $ 465 | $ 155 |
| Evaporative Cooler (Installation) | Home | 3,277 | 90% | 3,277 | 90% | $ 4,387,368 | 90% | 358 | 0% | 358 | 0% | $ 465,395 | 10% | 3,635 | 3,635 | $ 4,852,762 | $ 1,335 | $ 0 |
| Evaporative Cooler (Replacement) | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Furnace Repair | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Furnace Replacement | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Heat Pump Replacement | Home | 91 | 75% | 67 | 69% | $ 575,092 | 77% | 30 | 0% | 30 | 0% | $ 175,331 | 23% | 121 | 97 | $ 750,423 | $ 6,202 | $ 64 |
| Heat Pump Replacement - CAC Gas | Each | 13 | 65% | 11 | 61% | $ 69,166 | 64% | 7 | 0% | 7 | 0% | $ 38,427 | 36% | 20 | 18 | $ 107,593 | $ 5,380 | $ 299 |
| Heat Pump Replacement - CAC Propane | Each | 1 | 50% | 1 | 50% | $ 6,071 | 62% | 1 | 0% | 1 | 0% | $ 3,763 | 38% | 2 | 2 | $ 9,834 | $ 4,917 | $ 2,458 |
| High Efficiency Forced Air Unit (HE FAU) | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| High Efficiency Forced Air Unit (HE FAU) - Early | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| High Efficiency Forced Air Unit (HE FAU) - On Burnout | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Portable A/C | Each | 13 | 100% | 13 | 100% | $ 6,815 | 100% | - | 0% | - | 0% | $ - | 0% | 13 | 13 | $ 6,815 | $ 524 | $ 40 |
| Prescriptive Duct Sealing | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Removed - A/C Time Delay | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Removed - FAU Standing Pilot Conversion | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Room A/C Replacement | Home | 86 | 89% | 73 | 89% | $ 68,180 | 86% | 11 | 0% | 9 | 0% | $ 10,731 | 14% | 97 | 82 | $ 78,911 | $ 814 | $ 10 |
| Smart Thermostat | Home | 2,069 | 93% | 1,913 | 93% | $ 726,594 | 93% | 158 | 0% | 155 | 0% | $ 55,922 | 7% | 2,227 | 2,068 | $ 782,516 | $ 351 | $ 0 |
| Wholehouse Fan | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| **Maintenance** | | | | | | | | | | | | | | | | | | |
| Central A/C Tune up | Home | 843 | 98% | 383 | 96% | $ 117,252 | 98% | 17 | 0% | 16 | 0% | $ 2,885 | 2% | 860 | 399 | $ 120,137 | $ 140 | $ 0 |
| Furnace Clean and Tune | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| HVAC Air Filter Service | Each | 334 | 93% | 301 | 93% | $ 20,921 | 95% | 24 | 0% | 24 | 0% | $ 1,063 | 5% | 358 | 325 | $ 21,984 | $ 61 | $ 0 |
| Condenser Coil Cleaning | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Evaporative Cooler - Maint Functioning | Each | 167 | 87% | 166 | 87% | $ 58,515 | 91% | 24 | 0% | 24 | 0% | $ 5,964 | 9% | 191 | 190 | $ 64,479 | $ 338 | $ 2 |
| Evaporative Cooler - Maint Non-Functioning | Each | 70 | 99% | 70 | 99% | $ 34,815 | 99% | 1 | 0% | 1 | 0% | $ 250 | 1% | 71 | 71 | $ 35,065 | $ 494 | $ 7 |
| Evaporative Cooler Maintenance | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Evaporator Coil | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Fan Control Adjust | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Range Hood | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Refrigerant Charge Adjustment | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| **Lighting** | | | | | | | | | | | | | | | | | | |
| Exterior Hard wired LED fixtures | Each | 3,548 | 100% | 1,660 | 100% | $ 346,668 | 100% | 6 | 0% | 6 | 0% | $ 586 | 0% | 3,554 | 1,666 | $ 347,254 | $ 98 | $ 0 |
| LED A-Lamps | Each | 196,950 | 95% | 44,480 | 92% | $ 1,784,326 | 93% | 11,426 | 0% | 3,891 | 0% | $ 139,492 | 7% | 208,376 | 48,371 | $ 1,923,818 | $ 9 | $ 0 |
| LED R/BR Lamps | Each | 1,130 | 99% | 283 | 99% | $ 11,577 | 99% | 7 | 0% | 3 | 0% | $ 71 | 1% | 1,137 | 286 | $ 11,648 | $ 10 | $ 0 |
| Removed - Interior Hard wired LED fixtures | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Removed - LED Night Light | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Removed - LED Torchiere | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Removed - Occupancy Sensor | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| **Miscellaneous** | | | | | | | | | | | | | | | | | | |
| Air Purifier | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| CO and Smoke Alarm | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Cold Storage | Each | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Comprehensive Home Health and Safety Check-up | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Pool Pumps | Home | 388 | 82% | 388 | 82% | $ 636,822 | 83% | 88 | 0% | 88 | 0% | $ 133,649 | 17% | 476 | 476 | $ 770,471 | $ 1,619 | $ 3 |
| Smart Strip | Home | - | 0% | - | 0% | $ - | 0% | - | 0% | - | 0% | $ - | 0% | - | - | $ - | $ - | $ - |
| Smart Strip Tier II | Each | 48,051 | 97% | 25,603 | 96% | $ 3,044,327 | 97% | 1,448 | 0% | 1,019 | 0% | $ 90,210 | 3% | 49,499 | 26,622 | $ 3,134,538 | $ 63 | $ 0 |
| **Pilots** | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | |
| **Customer Enrollment** | | | | | | | | | | | | | | | | | | |
| ESA Outreach & Assessment | Home | 53,486 | 91% | 53,432 | 91% | $ 8,950,081 | 92% | 5,029 | 0% | 5,027 | 0% | $ 749,110 | 8% | 58,515 | 58,459 | $ 9,699,191 | $ 166 | $ 0 |
| ESA In-Home Energy Education | Home | 53,328 | 91% | 53,325 | 91% | $ 1,637,177 | 89% | 5,000 | 0% | 5,000 | 0% | $ 199,567 | 11% | 58,328 | 58,325 | $ 1,836,744 | $ 31 | $ 0 |

[1] Summary data which includes ESA Main Program (SF, MH)

**ESA Table 7 - ESA Expenditures Recorded by Cost Element**
**Southern California Edison**
**Program Year 2025 Annual Report**

| ESA Program: | Labor | Non-Labor | Contractor | Total |
|---|---|---|---|---|
| Energy Efficiency | | | | |
| ESA Main Program (SF, MH, MF In-Unit) | | | | |
| Appliances | | | $ 20,220,942 | $ 20,220,942 |
| Domestic Hot Water | | | $ 12,295,879 | $ 12,295,879 |
| Enclosure | | | $ 29,660 | $ 29,660 |
| HVAC | | | $ 10,309,405 | $ 10,309,405 |
| Maintenance | | | $ 241,665 | $ 241,665 |
| Lighting | | | $ 2,282,720 | $ 2,282,720 |
| Miscellaneous | | | $ 3,905,008 | $ 3,905,008 |
| Customer Enrollment | | | $ 9,699,191 | $ 9,699,191 |
| In Home Education | | | $ 1,836,744 | $ 1,836,744 |
| Pilot | | | $ - | $ - |
| **Energy Efficiency TOTAL** | **$ -** | **$ -** | **$ 60,821,214** | **$ 60,821,214** |
| | | | | |
| Multi-Family Whole Building | $ 2,165 | $ 266 | $ 8,984,178 | $ 8,986,609 |
| SPOC | $ 140,913 | $ 1,217 | $ - | $ 142,130 |
| Pilot Plus and Pilot Deep | $ 102,224 | $ 8,860 | $ 2,506,665 | $ 2,617,749 |
| Building Electrification (SCE Only) | $ 395,771 | $ 10,340 | $ 13,158,306 | $ 13,564,417 |
| Clean Energy Homes (SCE Only) | $ 141,890 | $ 698 | $ 144,098 | $ 286,686 |
| CSD Leveraging | $ - | $ - | $ - | $ - |
| | | | | |
| | | | | |
| Training Center | $ - | $ 79,651 | $ 467,103 | $ 546,754 |
| Workforce Education and Training | | | | $ - |
| Inspections | $ - | $ 5,491 | $ 1,592,993 | $ 1,598,484 |
| Marketing and Outreach | $ - | $ 220,184 | $ 1,475,165 | $ 1,695,349 |
| Statewide Marketing Education and Outreach | | | | $ - |
| Measurement and Evaluation Studies | $ 405 | $ 1,133 | $ 151,387 | $ 152,924 |
| Regulatory Compliance | $ 561,524 | $ 7,149 | $ 563,847 | $ 1,132,520 |
| General Administration | $ 2,627,730 | $ 163,476 | $ 2,933,633 | $ 5,724,839 |
| CPUC Energy Division | $ - | $ 10,159 | $ 114,548 | $ 124,707 |
| **Administration TOTAL** | **$ 3,189,659** | **$ 487,243** | **$ 7,298,675** | **$ 10,975,576** |
| | | | | |
| **TOTAL PROGRAM COSTS** | **$ 3,972,622** | **$ 508,624** | **$ 92,913,136** | **$ 97,394,382** |

**ESA Table 8 - ESA Homes Unwilling / Unable to Participate**
**Southern California Edison**
**Program Year 2025 Annual Report**

| | Reason Provided | | | | | | |
|---|---|---|---|---|---|---|---|
| **County** | **Customer Unwilling/Declined Program Measures** | **Customer Unavailable - Scheduling Conflicts** | **Hazardous Environment (unsafe/unclean)** | **Landlord Refused to Authorize Participation** | **Household Income Exceeds Allowable Limits** | **Unable to Provide Required Documentation** | **Other Infeasible/ Ineligible** |
| Fresno | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Imperial | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Inyo | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
| Kern | 110 | 28 | | 16 | 6 | 55 | 170 |
| Kings | 66 | 14 | | 14 | 6 | 7 | 33 |
| Los Angeles | 2709 | 295 | 5 | 99 | 124 | 218 | 2006 |
| Madera | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Mono | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Orange | 559 | 20 | | 7 | 27 | 13 | 261 |
| Riverside | 826 | 61 | 4 | 44 | 148 | 174 | 619 |
| San Bernardino | 1975 | 86 | | 31 | 177 | 178 | 547 |
| San Diego | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Santa Barbara | 0 | 0 | 0 | 0 | 0 | 0 | 5 |
| Tulare | 277 | 45 | | 25 | 27 | 41 | 350 |
| Tuolumne | - | - | - | - | - | - | - |
| Ventura | 25 | | | 1 | | 10 | 121 |
| **Total** | **6,547** | **549** | **9** | **237** | **515** | **696** | **4,114** |

[1] Summary data for ESA Main Program (SF, MH).

**ESAP Coordinated Treatment (SCE and SCG only)**

| | Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency | | | | |
|---|---|---|---|---|---|
| **# of Households Received Measures from one Utility, but not other Utility or Partnering Agency** | **Customer Unwilling/Declined Program Measures** | **# of Customer Unavailable - Scheduling Conflicts** | **# of Hazardous Environment (unsafe/unclean)** | **Landlord Refused to Authorize Participation** | **# of Other Infeasible/ Ineligible** |
| | 2,243 | 84 | 2 | 286 | 2,800 |
| **Total** | **2,243** | **84** | **2** | **286** | **2,800** |

[1] Summary data for ESA Main Program (SF, MH).

**ESA Table 9 - ESA Life Cycle Bill Savings by Measure**
**Southern California Edison**
**Program Year 2025 Annual Report**

| Residential Energy Rate Used for Bill Savings Calculations [2] | | |
|---|---|---|
| Year | $/kWh[1] | $/Therm |
| 2025 | $ 0.251 | |
| 2026 | $ 0.259 | |
| 2027 | $ 0.267 | |
| 2028 | $ 0.275 | |
| 2029 | $ 0.283 | |
| 2030 | $ 0.292 | |
| 2031 | $ 0.300 | |
| 2032 | $ 0.309 | |
| 2033 | $ 0.319 | |
| 2034 | $ 0.328 | |
| 2035 | $ 0.338 | |
| 2036 | $ 0.348 | |
| 2037 | $ 0.359 | |
| 2038 | $ 0.369 | |
| 2039 | $ 0.380 | |
| 2040 | $ 0.392 | |
| 2041 | $ 0.404 | |
| 2042 | $ 0.416 | |
| 2043 | $ 0.428 | |
| 2044 | $ 0.441 | |
| 2045 | $ 0.454 | |
| 2046 | $ 0.468 | |
| 2047 | $ 0.482 | |
| 2048 | $ 0.496 | |

| Non-Residential Energy Rate Used for Bill Savings Calculations (MFWB) [3] | | |
|---|---|---|
| Year | $/kWh[1] | $/Therm |
| 2025 | $ 0.235 | |
| 2026 | $ 0.242 | |
| 2027 | $ 0.249 | |
| 2028 | $ 0.257 | |
| 2029 | $ 0.265 | |
| 2030 | $ 0.273 | |
| 2031 | $ 0.281 | |
| 2032 | $ 0.289 | |
| 2033 | $ 0.298 | |
| 2034 | $ 0.307 | |
| 2035 | $ 0.316 | |
| 2036 | $ 0.325 | |
| 2037 | $ 0.335 | |
| 2038 | $ 0.345 | |
| 2039 | $ 0.356 | |
| 2040 | $ 0.366 | |
| 2041 | $ 0.377 | |
| 2042 | $ 0.389 | |
| 2043 | $ 0.400 | |
| 2044 | $ 0.412 | |
| 2045 | $ 0.425 | |
| 2046 | $ 0.437 | |
| 2047 | $ 0.450 | |
| 2048 | $ 0.464 | |

[1] For 2025, the average cost per kWh and therm paid by ESA participants is shown. Cost is escalated 3% annually for remaining years.

[2] Summary includes ESA Main Program (SF, MH) Pilot Plus and Pilot Deep, CSD Leveraging, and Building Electrification. Clean Energy Homes is not applicable.

**ESA Table 10 - ESA Bill Savings Calculations**
**Southern California Edison**
**Program Year 2025 Annual Report**

**ESA Table 10A**
**Bill Savings Calculations by Program Year (ESA Main - SF, MH)**

| Program Year | Program Costs | Program Lifecycle Bill Savings | Program Bill Savings/ Cost Ratio | Per Home Average Lifecycle Bill Savings |
|---|---|---|---|---|
| 2016 | $ 56,095,969 | $ 33,470,336 | 0.60 | $ 815 |
| 2017 | $ 61,120,956 | $ 41,459,029 | 0.68 | $ 516 |
| 2018 | $ 67,817,718 | $ 63,225,275 | 0.93 | $ 740 |
| 2019 | $ 90,358,914 | $ 75,721,253 | 0.84 | $ 794 |
| 2020 | $ 54,903,984 | $ 39,800,161 | 0.72 | $ 653 |
| 2021 | $ 81,224,622 | $ 77,038,386 | 0.95 | $ 848 |
| 2022 | $ 54,475,942 | $ 48,191,478 | 0.88 | $ 1,352 |
| 2023 | $ 21,708,461 | $ 13,689,121 | 0.63 | $ 1,038 |
| 2024 | $ 45,306,834 | $ 204,542,994 | 4.51 | $ 4,298 |
| 2025 | $ 71,796,791 | $ 59,748,894 | 0.83 | $ 1,082 |

**ESA Table 10B**
**Bill Savings Calculations by Program Year (Pilot Plus and Pilot Deep)**

| Program Year | Program Costs | Program Lifecycle Bill Savings | Program Bill Savings/ Cost Ratio | Per Home Average Lifecycle Bill Savings |
|---|---|---|---|---|
| 2016 | | | | |
| 2017 | | | | |
| 2018 | | | | |
| 2019 | | | | |
| 2020 | | | | |
| 2021 | | | | |
| 2022 | | | | |
| 2023 | $ 619,352 | $ 12,326 | 0.02 | $ 6,163 |
| 2024 | $ 1,631,552 | $ 203,973 | 0.13 | $ 7,845 |
| 2025 | $ 2,617,750 | $ 2,025,778 | 0.77 | $ 14,266 |

Data for program years prior to 2022 is not applicable as program not authorized until D.21-06-015.

**ESA Table 10C**
**Bill Savings Calculations by Program Year - MFWB**

| Program Year | Program Costs | Program Lifecycle Bill Savings | Program Bill Savings/ Cost Ratio | Per In-Unit Average Lifecycle Bill Savings | Per Property Average Lifecycle Bill Savings |
|---|---|---|---|---|---|
| 2022 | | | | | |
| 2023 | | | | | |
| 2024 | $ 1,656,369 | $ - | 0.00 | $ - | $ - |
| 2025 | $ 9,128,739 | $ 4,298,197 | 0.47 | $ 388 | $ 14,014 |

Data for program years prior to 2022 is not applicable as program not authorized until D.21-06-015.

**ESA Table 10D**
**Bill Savings Calculations by Program Year - Building Electrification**

| Program Year | Program Costs | Program Lifecycle Bill Savings | Program Bill Savings/ Cost Ratio | Per Home Average Lifecycle Bill Savings |
|---|---|---|---|---|
| 2022 | | | | |
| 2023 | $ 535,452 | $ 138,478 | 0.26 | $ 34,620 |
| 2024 | $ 3,017,561 | $ 2,689,415 | 0.89 | $ 23,185 |
| 2025 | $ 13,564,417 | $ 15,811,797 | 1.17 | $ 45,177 |

Data for program years prior to 2022 is not applicable as program not authorized until D.21-06-015.

Note: Clean Energy Homes is not applicable.

**ESA Table 11 - ESA Fund Shifting**
**Southern California Edison**
**Program Year 2025 Annual Report**

| | | | | FUND SHIFT AMOUNT | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | (Budget - Expenditures = | | | Among Categories | | | Carry Forward from 2025 | | | Commitments | | | | | | |
| Program Year 2025 | Variance | | | (1) Shift of Current Year Authorized | | | (2) Shift of Carry Forward | | | (3) Shift of Committed | | | Total Shifted Gas/ Electric | % of Authorized Total | Fund Shifting Source<br>1. Current Year Authorized<br>2. Carried Forward<br>3. Carried Back | To/From Year | Fund Shift Description | Authorization |
| | Electric | Gas | Total | Electric | Gas | Total | Electric | Gas | Total | Electric | Gas | Total | | | | | | |
| ESA Program: | ex. $x,xxx | ex. $x,xxx | ex. $x,xxx | ex. $x,xxx | ex. $x,xxx | ex. $x,xxx | ex. $x,xxx | ex. $x,xxx | ex. $x,xxx | ex. $x,xxx | ex. $x,xxx | ex. $x,xxx | *($x,xxx)* | *x%* | | | | *G-xxxx, D.xx- xx-xxx* |
| **Energy Efficiency [2]** | $(6,197,647) | | **$(6,197,647)** | $ (881,176) | $ - | **$ (881,176)** | $ - | | **$ -** | $ 7,078,824 | | **$ 7,078,824** | $ 6,197,647 | 6.4% | 1. Committed from prior year<br>2. Current year authorized | 2025 | 1. Utilizing prior year committed funds on EE<br>2. Shift from EE measure to Gen Admin | 1.D.21-06-015<br>2. D.17-12-009 |
| Appliances | | | **$ -** | $ - | $ - | **$ -** | $ - | | **$ -** | | | **$ -** | $ - | 0.0% | | | | |
| Domestic Hot Water | | | **$ -** | $ - | $ - | **$ -** | $ - | | **$ -** | | | **$ -** | $ - | 0.0% | | | | |
| Enclosure | | | **$ -** | $ - | $ - | **$ -** | $ - | | **$ -** | | | **$ -** | $ - | 0.0% | | | | |
| HVAC | | | **$ -** | $ - | $ - | **$ -** | $ - | | **$ -** | | | **$ -** | $ - | 0.0% | | | | |
| Maintenance | | | **$ -** | $ - | $ - | **$ -** | $ - | | **$ -** | | | **$ -** | $ - | 0.0% | | | | |
| Lighting | | | **$ -** | $ - | $ - | **$ -** | $ - | | **$ -** | | | **$ -** | $ - | 0.0% | | | | |
| Miscellaneous | | | **$ -** | $ - | $ - | **$ -** | $ - | | **$ -** | | | **$ -** | $ - | 0.0% | | | | |
| Customer Enrollment | | | **$ -** | $ - | $ - | **$ -** | $ - | | **$ -** | | | **$ -** | $ - | 0.0% | | | | |
| In Home Education | | | **$ -** | $ - | $ - | **$ -** | $ - | | **$ -** | | | **$ -** | $ - | 0.0% | | | | |
| Pilot | | | **$ -** | $ - | $ - | **$ -** | $ - | | **$ -** | $ - | | **$ -** | $ - | 0.0% | | | | |
| Multi-Family Whole Building | $ 5,714,189 | | **$ 5,714,189** | $ - | $ - | **$ -** | $ 5,714,189 | | **$ 5,714,189** | $ - | | **$ -** | $ 5,714,189 | 5.9% | 1.Carried Forward | 1. 2025 to 2026 | Carry forward to 2026 | 1.D.21-06-015 |
| SPOC | $ 29,799 | | **$ 29,799** | $ - | $ - | **$ -** | $ 29,799 | | **$ 29,799** | $ - | | **$ -** | $ 29,799 | 0.0% | 1.Carried Forward | 1. 2025 to 2026 | Carry forward to 2026 | 1.D.21-06-015 |
| Pilot Plus and Pilot Deep | $ 1,267,114 | | **$ 1,267,114** | $ - | $ - | **$ -** | $ 1,267,114 | | **$ 1,267,114** | $ - | | **$ -** | $ 1,267,114 | 1.3% | 1.Carried Forward | 1. 2025 to 2026 | Carry forward to 2026 | 1.D.21-06-015 |
| Building Electrification | $(1,448,766) | | **$(1,448,766)** | $ - | $ - | **$ -** | $(1,448,766) | | **$(1,448,766)** | $ - | | **$ -** | $ (1,448,766) | -1.5% | 1.Carried Forward | 1. 2024 to 2025 | Carry forward to 2026 | 1.D.21-06-015 |
| Clean Energy Homes | $ 1,374,314 | | **$ 1,374,314** | $ - | $ - | **$ -** | $ 1,374,314 | | **$ 1,374,314** | $ - | | **$ -** | $ 1,374,314 | 1.4% | 1.Carried Forward | 1. 2025 to 2026 | Carry forward to 2026 | 1.D.21-06-015 |
| Leveraging | $ - | | **$ -** | $ - | $ - | **$ -** | $ - | | **$ -** | $ - | | **$ -** | $ - | 0.0% | | | | |
| **Energy Efficiency TOTAL** | **$ 739,003** | **$ -** | **$ 739,003** | **$ (881,176)** | **$ -** | **$ (881,176)** | **$ 6,936,650** | **$ -** | **$ 6,936,650** | **$ 7,078,824** | **$ -** | **$ 7,078,824** | **$ 13,134,298** | 13.6% | | | | |
| Training Center | $ (96,266) | $ - | **$ (96,266)** | $ 96,266 | $ - | **$ 96,266** | $ - | $ - | **$ -** | $ - | $ - | **$ -** | $ 96,266 | 0.1% | 1. Current Year Authorized | 1. 2025 | Shift from Marketing | 1.D.21-06-015 |
| Inspections | $ (647,562) | $ - | **$ (647,562)** | $ - | $ - | **$ -** | | $ - | **$ -** | $ 647,562 | $ - | **$ 647,562** | $ 647,562 | 0.7% | 1. Prior year commitment | 1. 2025 | Utilizing prior year committed funds on EE | 1.D.21-06-015<br>2. D.17-12-009 |
| Marketing and Outreach | $ 843,676 | $ - | **$ 843,676** | $ (843,676) | $ - | **$ (843,676)** | $ - | $ - | **$ -** | $ - | $ - | **$ -** | $ (843,676) | -0.9% | 1. Current Year Authorized | 1. 2025 | Shift to Training Center, Reg Compliance, Gen Admin CPUC ED | 1.D.21-06-015 |
| Statewide ME&O | $ - | $ - | $ - | $ - | $ - | **$ -** | $ - | $ - | **$ -** | $ - | $ - | **$ -** | $ - | 0.0% | | | | |
| M&E Studies | $ (60,424) | $ - | **$ (60,424)** | $ - | $ - | **$ -** | $ (60,424) | $ - | **$ (60,424)** | $ - | $ - | **$ -** | $ (60,424) | -0.1% | 1.Carried Forward | 1.2024 to 2025 | $60,424 carry forward from 2024 to 2025 | 1.D.21-06-015 |
| Regulatory Compliance | $ (310,851) | $ - | **$ (310,851)** | $ 310,851 | $ - | **$ 310,851** | $ - | $ - | **$ -** | $ - | $ - | **$ -** | $ 310,851 | 0.3% | 1. Current Year Authorized | 1. 2025 | Shift from Marketing | 1.D.21-06-015 |
| General Administration | $(1,244,608) | $ - | **$(1,244,608)** | $ 1,244,608 | $ - | **$ 1,244,608** | $ - | $ - | **$ -** | $ - | $ - | **$ -** | $ 1,244,608 | 1.3% | 1. Current Year Authorized | 1. 2025 | Shift from EE and Marketing | 1.D.21-06-015 |
| CPUC Energy Division | $ (73,128) | $ - | **$ (73,128)** | $ 73,128 | $ - | **$ 73,128** | $ - | $ - | **$ -** | $ - | $ - | **$ -** | $ 73,128 | 0.1% | 1. Current Year Authorized | 1. 2025 | Shift from Marketing | 1.D.21-06-015 |
| | | | | | | | | | | | | | | 0.0% | | | | |
| Subtotal of Administration | $(1,589,162) | | **$(1,589,162)** | $ 881,176 | | **$ 881,176** | $ (60,424) | $ - | **$ (60,424)** | $ 647,562 | $ - | **$ 647,562** | $ 1,468,314 | 1.5% | | | | |
| **TOTAL PROGRAM COSTS** | **$ (850,160)** | **$ -** | **$ (850,160)** | **$ -** | **$ -** | **$ -** | **$ 6,876,226** | **$ -** | **$ 6,876,226** | **$ 7,726,386** | **$ -** | **$ 7,726,386** | **$ 14,602,612** | **15.1%** | | | | |

[1] Subtotal of Administration is comprised of the Training Center, Inspections, Marketing and Outreach, Regulatory Compliance, General Administration, and CPUC Energy Division line items for ESA Main whose funds can be committed since they are part of ESA Main. M&E Studies and SPOC line items can be carried over, and are repre

**ESA Table 12 - ESA Categorical and Other Enrollment**
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| ESA Table 12A<br>ESA Main (SF, MH) | |
|---|---|
| **Type of Enrollment** | **Number of Homes Treated** |
| Women, Infants, and Children Program (WIC) | 2,113 |
| Supplemental Security Income (SSI) | 1,592 |
| CalFresh/Supplemental Nutrition Assistance Program - Food Stamps | 3,779 |
| CalWORKs/Temporary Assistance for Needy Families (TANF) | 132 |
| Tribal TANF | - |
| Medicaid/Medi-Cal for Families | 10,786 |
| Healthy Families A&B | - |
| National School Lunch Program (NSLP) - Free Lunch | 8 |
| Low-income Home Energy Assistance Program (LIHEAP) | - |
| Bureau of Indian Affairs General Assistance | 2 |
| Head Start Income Eligible - (Tribal Only) | - |
| CARE Income Certified | - |
| 80/20 Rule [2] | - |
| Targeted Self Certification | 20,193 |
| Other - Categorical | 1,311 |
| Standard Enrollment | 15,282 |
| **Total** | **55,198** |

| ESA Table 12B<br>ESA Pilot Plus and Pilot Deep | |
|---|---|
| **Type of Enrollment** | **Number of Homes Treated** |
| Women, Infants, and Children Program (WIC) | 1 |
| Supplemental Security Income (SSI) | 1 |
| CalFresh/Supplemental Nutrition Assistance Program - Food Stamps | 8 |
| CalWORKs/Temporary Assistance for Needy Families (TANF) | 1 |
| Tribal TANF | - |
| Medicaid/Medi-Cal for Families | 40 |
| Healthy Families A&B | - |
| National School Lunch Program (NSLP) - Free Lunch | - |
| Low-income Home Energy Assistance Program (LIHEAP) | - |
| Bureau of Indian Affairs General Assistance | - |
| Head Start Income Eligible - (Tribal Only) | - |
| CARE Income Certified | - |
| 80/20 Rule | - |
| Targeted Self Certification | - |
| Other - Categorical | - |
| Standard Enrollment | 91 |
| **Total** | **142** |

| ESA Table 12C<br>ESA Building Electrification (SCE Only) | |
|---|---|
| **Type of Enrollment** | **Number of Homes Treated** |
| Women, Infants, and Children Program (WIC) | 45 |
| Supplemental Security Income (SSI) | 10 |
| CalFresh/Supplemental Nutrition Assistance Program - Food Stamps | 19 |
| CalWORKs/Temporary Assistance for Needy Families (TANF) | - |
| Tribal TANF | - |
| Medicaid/Medi-Cal for Families | 176 |
| Healthy Families A&B | - |
| National School Lunch Program (NSLP) - Free Lunch | - |
| Low-income Home Energy Assistance Program (LIHEAP) | - |
| Bureau of Indian Affairs General Assistance | - |
| Head Start Income Eligible - (Tribal Only) | - |
| CARE Income Certified | - |
| 80/20 Rule | - |
| Targeted Self Certification | - |
| Other - Categorical | - |
| Standard Enrollment | 100 |
| **Total** | **350** |

Note: Categorical enrollment is not applicable to MFWB or Clean Energy Homes.

**ESA Table 13A - ESA Leveraging & Integration [1]**
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**ESA Table 13A-1**
**ESA Main (SF, MH)**

| Partner | Brief Description of Effort | Relationship outside the IOU? | MOU Present? | Amount of Dollars Saved [2] | Amount of Energy Savings [3] | Other Measurable Benefits [3] | Enrollments Resulting from Leveraging Effort [4] | Methodology [5] | Meets all Criteria | If not, Explain |
|---|---|---|---|---|---|---|---|---|---|---|
| Grid Alternatives (SASH program administrator) | G.A. shares with SCE leads for low income SF homes on which they intend to install solar panels. SCE ensures those homes have been or will be enrolled in ESA. | Yes | Yes | $4,030 | 48,750 | No | 130 | [5] | Yes | |
| Other IOU ESA Programs (SoCalGas, PG&E, SWG, Data sharing) | IOUs share lists of homes served in joint territories. | Yes | Yes | $18,011 | 217,875 | No | 581 | [5] | Yes | |
| Whole Home to ESA Main | Number of homes Referred to ESA Main due to home not being able to meet minimum 5% energy savings to be eligible for ESA Whole Home participation. | No | N/A | $38 | 385 | No | 1 | [5] | [6] | |

**NOTES:**

[1] Leveraging, Interdepartmental Integration, Program Coordination, Data Sharing, ME&O, etc.

[2] Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU). In 2025 SCE spent approximately $31 ($1,695,349 / 55,198 HT) per Treated lead through marketing and outreach efforts. a) DAC-SASH: 130 homes x $31 per home = $4,030 b) 581 Treated homes through other IOUs' ESA/low income programs at $31 per saved lead = $18,011. c) Whole Home to Core: 1 homes x $38 per home = $38

[3] Energy savings/benefits. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households. Average kWh saved per Treated home in PY 2025 is 385 kWh as calculated from ESA Table 2 of this report: 20,697,740 kWh / 55,198 treated homes = 385 kWh/home. a) 130 ESA homes treated with SASH 130 x 375 kWh/HT = 48,750 kWh. b) 581 ESA homes treated via IOU data sharing x 375 kWh/Home = 217,875 kWh. c) Whole Home to Main: 1 ESA homes treated x 385 kWh/Home = 385 kWh.

[4] Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

[5] Savings are calculated based on SCE Ex-Ante analysis of DNV-GL ESA Program 2015-2017 Impact Evaluation Final Report, or statewide or SCE workpapers.

[6] This integration effort did not truly save SCE any money. Outreach and marketing costs which would have otherwise been borne by ESA Main were instead paid for by the ESA Whole Home pilot.

**ESA Table 13A-2**
**MFWB**

| Partner | Brief Description of Effort | Relationship outside the IOU? | MOU Present? | Amount of Dollars Saved [2] | Amount of Energy Savings [3] | Other Measurable Benefits [3] | Enrollments Resulting from Leveraging Effort [4] | Methodology [5] | Meets all Criteria | If not, Explain |
|---|---|---|---|---|---|---|---|---|---|---|
| Center for Sustainable Energy (SOMAH Program Administrator) | CSE shares Multifamily property leads with SCE. These properties have already installed solar panels or are pending installation. SCE shares the leads with the MFWB Implementer for potential participation in MFWB. | Yes | Yes | $ 124 | 1500 | N | 4 | [5] | Yes | |

[1] Leveraging, Interdepartmental Integration, Program Coordination, Data Sharing, ME&O, etc.

[2] Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU). In 2025 SCE spent approximately $31 ($1,695,349 / 55,198 HT) per Treated lead through marketing and outreach efforts. a) SOMAH: 4 Properties x $31 per home = $124

[3] Energy savings/benefits. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households. Average kWh saved per Treated home in PY 2025 is 375 kWh as calculated from ESA Table 2 of this report: 20,697,740kWh / 55,198 treated homes = 375 kWh/home. a) 4 ESA properties treated by SOMAH 4 x 375 kWh/HT = 1500 kWh.

[4] Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

[5] Savings are calculated based on SCE Ex-Ante analysis of DNV-GL ESA Program 2015-2017 Impact Evaluation Final Report, or statewide or SCE workpapers.

**ESA Table 13A-3**
**ESA Pilot Plus and Pilot Deep**

| Partner | Brief Description of Effort | Relationship outside the IOU? | MOU Present? | Amount of Dollars Saved [2] | Amount of Energy Savings [3] | Other Measurable Benefits [3] | Enrollments Resulting from Leveraging Effort [4] | Methodology [5] | Meets all Criteria | If not, Explain |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | |

Note: ESA Whole Home Pilot is a targeted pilot being marketed to a limited customer list. Therefore, no leveraging is taking place at this time

**ESA Table 13A-4**
**ESA Building Electrification (SCE Only)**

| Partner | Brief Description of Effort [1] | Relationship outside the IOU? | MOU Present? | Amount of Dollars Saved [2] | Amount of Energy Savings | Other Measurable Benefits | Enrollments Resulting from Leveraging Effort | Methodology | Meets all Criteria | If not, Explain |
|---|---|---|---|---|---|---|---|---|---|---|
| Bassett-Avocado Heights Advanced Energy Community (BAAEC) | Coordinated with BAAEC initiative to leverage external CEC EPIC funding, enabling ESA BE customers to receive solar and battery storage in addition to building electrification measures, while minimizing customer handoffs and avoiding duplication of funding. | Yes | No | $ 11,059 | N/A | Enabled comprehensive electrification packages by addressing cost and infrastructure gaps, improved customer experience through coordinated delivery, and expanded customer benefits beyond ESA-funded measures. | 4 | Coordination entailed pre-qualifying customers through BAAEC, if met ESA eligibility requirements, then received BE measures alongside BAAEC-funded installations. | Yes | N/A |

[1] ESA BE customers could also receive solar and battery storage, which is not funded through ESA BE and instead supported through the California Energy Commission Electric Program Investment Charge (CEC EPIC) initiative.

[2] The reported dollars saved are attributable to heat pump water heaters previously installed through the BAAEC initiative, with no associated costs incurred by the ESA BE Pilot.

**ESA Table 13A-5**
**ESA Clean Energy Homes (SCE Only)**

| Partner | Brief Description of Effort | Relationship outside the IOU? | MOU Present? | Amount of Dollars Saved | Amount of Energy Savings | Other Measurable Benefits | Enrollments Resulting from Leveraging Effort [1] | Methodology | Meets all Criteria | If not, Explain |
|---|---|---|---|---|---|---|---|---|---|---|
| BUILD | Coordination, engagement and outreach to BUILD participants; offering Tenant Energy Education available through CEH Pilot Program | Yes | No | N/A | N/A | N/A | 3 | N/A | N/A | |

[1] Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc. Leveraging BUILD program enrollment for new Tenant Education component of CEH resulted in 6 applications for Tenant Education.

Fields not applicable to specific efforts are marked "N/A".

**ESA Table 13B - ESA Clean Energy Referral, Leveraging, and Coordination**
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| Partner | Brief Description of Effort | # of Referral [1] | # of Leveraging [2] | # of Coordination Efforts [3] | # of Leads [4] | # of Enrollments from Successful Leads [5] |
|---|---|---|---|---|---|---|
| Single-Family Affordable Solar Homes (SASH)[9] [10] | Provides qualified low-income homeowners fixed, up front, capacity-based incentives to help offset the upfront cost of a solar electric system. | 19 | N/A | N/A | 373 | 130 |
| 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. | 675 | 1 | N/A | 36 | 0 |
| Medical Baseline (MBL) [11] | 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 | 148 | 8,847 | 5,160 |
| CARE/FERA Income Verification | 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 | 1,534 | 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 | 606 | 194 |
| 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 | 10 | 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. | 70 | N/A | 17 | N/A | N/A |
| Demand Response - Smart Energy Program (SEP) [7] | Eligible residential customers who own a qualifying Wi-Fi enabled smart thermostat may enroll. During an "energy event", SCE will notify the smart thermostat provider to temporarily adjust the temperature setting on the thermostat up to four degrees to limit A/C usage. Participating customers may qualify for a one-time $75 incentive for enrolling and earn up to $40 annually for participating between June 1 through September 30. | 129 | N/A | 20 | N/A | N/A |
| Tribal Activity | SCE collaborated with Tribal leaders, offering $13K mini grants aimed at providing training on SCE’s income-qualified programs. The objective was to empower Tribal leaders to act as intermediaries within their communities, disseminating information about these programs to increase Tribal enrollments and installations. In addition, the SCE Tribal team engages daily with 13 federally recognized tribes to promote SCE products and services. | N/A | N/A | 36 | 0 | N/A |
| Other Utilities [6] | Southwest Gas | 1,718 | N/A | N/A | 1,313 | 93 |
| Other Utilities [6] | SoCalGas | N/A | N/A | N/A | 512 | 488 |
| Other Utilities [6] | 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 | 2,021 | N/A | 0 | N/A | N/A |
| ESA Whole Home to ESA Main | 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 | 146 | 8 |

[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, tradeshows, 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] YTD 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] 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 single-family households that have completed the Energy Savings Assistance (ESA) Program requirements of the California Alternate Rates for Energy (CARE) Program high usage process."

[10] Enrollments previously calculated as leads successfully imported to ESA systems. Updated to reflect current calculation based on number of imported and enrolled customers.

[11] Number of Leads may be less than previously reported depending on the customers account status at the time the data is provided

## ESA Table 14 - ESA Expenditures for Pilots and Studies
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| | Authorized 2021-26 Funding | | | Year to Date Expenses | | | Cycle to Date Expenses | | | % of Budget Expensed | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 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 | $ 2,617,750 | $ - | $ 2,617,750 | $ 4,243,086 | $ - | $ 4,243,086 | 22% | | 22% |
| Building Electrification Retrofit Pilot | $ 40,832,693 | $ - | $ 40,832,693 | $13,564,417 | $ - | $13,564,417 | $ 17,240,832 | $ - | $ 17,240,832 | 42% | | 42% |
| Clean Energy Homes New Construction Pilot | $ 8,859,000 | $ - | $ 8,859,000 | $ 286,686 | $ - | $ 286,686 | $ 1,265,719 | $ - | $ 1,265,719 | 14% | | 14% |
| **Total Pilots** | **$69,116,010** | **$ -** | **$69,116,010** | **$16,468,853** | **$ -** | **$16,468,853** | **$22,749,638** | **$ -** | **$22,749,638** | **33%** | | **33%** |
| | | | | | | | | | | | | |
| **Pilot Evaluations (SCE)** [6] | | | | | | | | | | | | |
| ESA Pilot Plus/Deep Program Pilot Evaluation | $ 1,744,513 | $ - | $ 1,744,513 | $ 121,837 | $ - | $ 121,837 | $ 350,280 | $ - | $ 350,280 | 20% | | 20% |
| Building Electrification Retrofit Pilot Evaluation | $ 594,930 | $ - | $ 594,930 | $ 173,084 | $ - | $ 173,084 | $ 394,528 | $ - | $ 394,528 | 66% | | 66% |
| Clean Energy Homes New Construction Pilot Evaluation | $ 164,550 | $ - | $ 164,550 | $ 19,172 | $ - | $ 19,172 | $ 47,667 | $ - | $ 47,667 | 29% | | 29% |
| **Total Pilot Evaluations** | **$ 2,503,993** | **$ -** | **$ 2,503,993** | **$ 314,093** | **$ -** | **$ 314,093** | **$ 792,475** | **$ -** | **$ 792,475** | **32%** | | **32%** |
| | | | | | | | | | | | | |
| **Studies** [1][2] | | | | | | | | | | | | |
| Joint IOU - 2025 Low Income Needs Assessment (LINA) Study [3] | $ 75,000 | $ - | $ 75,000 | $ 68,143 | $ - | $ 68,143 | $ 74,169 | $ - | $ 74,169 | 99% | | 99% |
| Joint IOU - 2028 Low Income Needs Assessment (LINA) Study | $ 75,000 | $ - | $ 75,000 | $ - | $ - | $ - | $ - | $ - | $ - | 0% | | 0% |
| Joint IOU - Statewide CARE-ESA Categorical Study [4] | $ 22,495 | $ - | $ 22,495 | $ - | $ - | $ - | $ 22,494 | $ - | $ 22,494 | 100% | | 100% |
| Load Impact Evaluation Study | $ 450,000 | $ - | $ 450,000 | $ - | $ - | $ - | $ - | $ - | $ - | 0% | | 0% |
| ESA Non-Energy Impacts (NEI) Study [5] | $ 150,000 | $ - | $ 150,000 | $ 80,247 | $ - | $ 80,247 | $ 131,712 | $ - | $ 131,712 | 88% | | 88% |
| 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** | **$1,077,495** | **$ -** | **$1,077,495** | **$148,390** | **$ -** | **$148,390** | **$228,375** | **$ -** | **$228,375** | **21%** | | **21%** |

[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 and will cross-bill the other IOUs. The total budget and spend reflected includes SCE's allocated CFA portion only.

[6] Pilot Evaluation budget and expenditures are included in the overall budget and expenditures of the Pilot.
[7] This represents the full evaluation budget.

**ESA Table 15 - ESA Tribal Outreach**
**Southern California Edison**
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| 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, Tule River Indian tribe, Chemehuevi Indian Tribe, Morongo, Agua Caliente, Pechanga, Bishop Paiute |
| Tribes who have not accepted offer to Meet and Confer | 0 | |
| Non-Federally Recognized Tribes who participated in Meet & Confer | 0 | |
| 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) | 8 | Bridgeport Indian Colony, Soboba, Tule River Indian Tribe, Chemehuevi Indian Tribe, Morongo, Agua Caliente, Pechanga, Bishop Paiute |
| Housing Authority and TANF offices who participated in Meet and Confer | 0 | |

**ESA Table 16 - ESA Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions**
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**Program Year 2025 Annual Report**

**ESA Table 16A - 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 Household | Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures) | Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only) | Avg. Cost Per Treated Households | Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Demographic** | | | | | | | | | | | | |
| Housing Type | | | | | | | | | | | | |
| SF | 1,182,355 | 49,448 | 4.18% | 17,762 | 278% | 356 | 356 | 0.060 | 0.34 | 0.34 | $ 968 | 0.068 |
| MH | 109,067 | 5,750 | 5.27% | 1,245 | 462% | 341 | 341 | 0.050 | -2.13 | -2.13 | $ 720 | 0.002 |
| MF In-Unit | 424,628 | | | | | | | | | | | |
| Rent vs. Own | | | | | | | | | | | | |
| Own | 853,550 | 29,468 | 3.45% | 11,930 | 247% | 368 | 368 | 0.060 | 3.22 | 3.22 | $ 1,253 | 0.016 |
| Rent | 866,356 | 25,730 | 2.97% | 7,077 | 364% | 339 | 339 | 0.050 | -3.52 | -3.52 | $ 587 | 0.022 |
| Previous vs. New Participant | | | | | | | | | | | | |
| Previous | - | 10 | 0% | 3 | 333% | 225 | 225 | 0.190 | 59.09 | 59.09 | $ 3,265 | 0.007 |
| New Participant | 27,051 | 55,188 | 204% | 19,004 | 290% | 354 | 354 | 0.060 | 0.07 | 0.07 | $ 942 | 0.018 |
| Seniors | 517,903 | 18,610 | 3.59% | 7,445 | 250% | 368 | 368 | 0.060 | 0.6 | 0.6 | $ 1,038 | 0.020 |
| Veterans | 93,998 | 1,047 | 1.11% | 433 | 242% | 372 | 372 | 0.060 | 5.64 | 5.64 | $ 1,411 | 0.018 |
| Hard-to-Reach[4] | 1,352,338 | 51,504 | 3.81% | 17,596 | 293% | 355 | 355 | 0.060 | -0.1 | -0.1 | $ 929 | 0.018 |
| Vulnerable[5] | 603,866 | 45,587 | 7.55% | 15,783 | 289% | 350 | 350 | 0.060 | -1.1 | -1.1 | $ 820 | 0.024 |
| **Location** | | | | | | | | | | | | |
| DAC | 464,442 | 34,489 | 7.43% | 11,692 | 295% | 356 | 356 | 0.060 | -2.85 | -2.85 | $ 690 | 0.023 |
| Rural | 276,728 | 11,334 | 4.10% | 4,051 | 280% | 404 | 404 | 0.060 | 4.93 | 4.93 | $ 1,554 | 0.040 |
| Tribal | 8,832 | 87 | 0.99% | 26 | 335% | 394 | 394 | 0.060 | 3.22 | 3.22 | $ 1,446 | 0.015 |
| PSPS Zone | 118,256 | 324 | 0.27% | 177 | 183% | 317 | 317 | 0.050 | 1.89 | 1.89 | $ 991 | 0.016 |
| Wildfire Zone | 281,693 | 8,707 | 3.09% | 3,043 | 286% | 321 | 321 | 0.050 | 4.32 | 4.32 | $ 1,200 | 0.008 |
| Climate Zone 06 | 255,968 | 1,877 | 0.73% | 738 | 254% | 297 | 297 | 0.040 | -0.24 | -0.24 | $ 871 | 0.031 |
| Climate Zone 08 | 416,496 | 19,249 | 4.62% | 6,774 | 284% | 329 | 329 | 0.050 | -4.03 | -4.03 | $ 481 | 0.047 |
| Climate Zone 09 | 322,218 | 9,424 | 2.92% | 3,089 | 305% | 400 | 400 | 0.060 | -4.38 | -4.38 | $ 594 | 0.011 |
| Climate Zone 10 | 354,584 | 10,677 | 3.01% | 3,707 | 288% | 281 | 281 | 0.050 | 5.82 | 5.82 | $ 1,160 | 0.017 |
| Climate Zone 13 | 85,320 | 4,923 | 5.77% | 1,741 | 283% | 454 | 454 | 0.070 | 0.12 | 0.12 | $ 1,502 | 0.049 |
| Climate Zone 14 | 168,751 | 7,215 | 4.28% | 2,389 | 302% | 451 | 451 | 0.070 | 6.67 | 6.67 | $ 1,862 | 0.011 |
| Climate Zone 15 | 63,163 | 1,322 | 2.09% | 360 | 367% | 172 | 172 | 0.030 | 10.47 | 10.47 | $ 1,384 | 0.004 |
| Climate Zone 16 | 53,342 | 511 | 0.96% | 209 | 244% | 362 | 362 | 0.060 | -1.98 | -1.98 | $ 928 | 0.045 |
| CARB Communities[6] | 169,417 | 14,901 | 8.80% | 5,143 | 290% | 338 | 338 | 0.050 | -4.35 | -4.35 | $ 479 | 0.060 |
| **Financial** | | | | | | | | | | | | |
| CARE | 1,284,448 | 40,598 | 3.16% | 14,853 | 273% | 357 | 357 | 0.060 | 0.73 | 0.73 | $ 1,009 | 0.066 |
| FERA | 357,233 | 605 | 0.17% | 234 | 259% | 386 | 386 | 0.060 | 4.92 | 4.92 | $ 1,352 | 0.072 |
| Disconnected[7] | 35,313 | 178 | 0.50% | 98 | 182% | 305 | 305 | 0.050 | -1.9 | -1.9 | $ 765 | 0.047 |
| Arrearages | 687,677 | 9,655 | 1.40% | 4,515 | 214% | 359 | 359 | 0.060 | -1.26 | -1.26 | $ 846 | 0.027 |
| High Usage | 69,406 | 1,450 | 2.09% | 650 | 223% | 376 | 376 | 0.060 | 1.42 | 1.42 | $ 1,112 | 0.057 |
| High Energy Burden[8] | 372,317 | 14,834 | 3.98% | 5,117 | 290% | 374 | 374 | 0.060 | 5.41 | 5.41 | $ 1,531 | 0.024 |
| SEVI[9] | | | | | | | | | | | | |
| Low[9] | 203,389 | 2,649 | 1.30% | 969 | 273% | 333 | 333 | 0.050 | 5.82 | 5.82 | $ 1,374 | 0.022 |
| Medium[9] | 595,200 | 17,360 | 2.92% | 6,332 | 274% | 360 | 360 | 0.060 | 3.43 | 3.43 | $ 1,245 | 0.019 |
| High[9] | 523,601 | 35,189 | 6.72% | 11,706 | 301% | 353 | 353 | 0.060 | -2.01 | -2.01 | $ 760 | 0.018 |
| Affordability Ratio[10] | 88,451 | 54,960 | 62.14% | 18,973 | 290% | 355 | 355 | 0.060 | 0.08 | 0.08 | $ 943 | 0.018 |
| **Health Condition** | | | | | | | | | | | | |
| Medical Baseline | 26,355 | 2,726 | 10.34% | 1,110 | 246% | 376 | 376 | 0.060 | 4.05 | 4.05 | $ 1,355 | 0.019 |
| Respiratory[11] | | | | | | | | | | | | |
| Low[11] | 370,549 | 3,629 | 0.98% | 1,302 | 279% | 317 | 317 | 0.050 | 3.63 | 3.63 | $ 1,118 | 0.012 |
| Medium[11] | 506,698 | 25,709 | 5.07% | 8,888 | 289% | 336 | 336 | 0.050 | -0.69 | -0.69 | $ 814 | 0.032 |
| High[11] | 444,943 | 25,860 | 5.81% | 8,817 | 293% | 377 | 377 | 0.060 | 0.35 | 0.35 | $ 1,045 | 0.014 |
| Disabled | 338,216 | 7,569 | 2.24% | 2,789 | 271% | 392 | 392 | 0.060 | 3.29 | 3.29 | $ 1,368 | 0.018 |

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 2024.

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.

## ESA Table 16B - ESA MFWB Whole Building

| Customer Segments | # of Properties Eligible | # of Properties Treated[1] | 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 | Avg. Properties Energy Savings (kWh) / Total Annual Energy Use (kWh) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Location** | | | | | | | | | | | | |
| DAC | | 20 | | | | 5,993 | 5,993 | 1 | 158 | 158 | $ 42,165 | 0.005 |
| Rural | | 6 | | | | 3,353 | 3,353 | 1 | 81 | 81 | $ 25,702 | 0.140 |
| Tribal | | - | | | | - | - | - | - | - | $ - | - |
| PSPS Zone | | - | | | | - | - | - | - | - | $ - | - |
| Wildfire Zone | | - | | | | - | - | - | - | - | $ - | - |
| Climate Zone 06 | | 6 | | | | 2,463 | 2,463 | 0 | (16) | (16) | $ 25,539 | 0.007 |
| Climate Zone 08 | | 5 | | | | 12,236 | 12,236 | 0 | (50) | (50) | $ 90,351 | 0.031 |
| Climate Zone 09 | | 4 | | | | 2,912 | 2,912 | 0 | 100 | 100 | $ 31,135 | 0.342 |
| Climate Zone 10 | | 6 | | | | 4,161 | 4,161 | 3 | 421 | 421 | $ 34,453 | 0.006 |
| Climate Zone 13 | | 3 | | | | 4,415 | 4,415 | 0 | (33) | (33) | $ 18,154 | 0.266 |
| Climate Zone 14 | | 3 | | | | 4,300 | 4,300 | 0 | (35) | (35) | $ 28,430 | 0.042 |
| Climate Zone 15 | | - | | | | - | - | - | - | - | $ - | - |
| Climate Zone 16 | | 1 | | | | 568 | 568 | 0 | 590 | 590 | $ 48,342 | 0.325 |
| CARB Communities[2] | | 3 | | | | 1,915 | 1,915 | 0 | (17) | (17) | $ 31,301 | 0.003 |
| **Other** | | | | | | | | | | | | |
| Vulnerable[3] | | 24 | | | | 5,356 | 5,356 | 1 | 130 | 130 | $ 42,219 | 0.004 |
| High Energy Burden[4] | | 10 | | | | 2,515 | 2,515 | 0 | (20) | (20) | $ 31,665 | 0.016 |
| SEVI[5] | | | | | | | | | | | | |
| Low | | 4 | | | | 1,009 | 1,009 | 0 | 1 | 1 | $ 51,800 | 0.026 |
| Medium | | 12 | | | | 6,942 | 6,942 | 0 | (34) | (34) | $ 56,437 | 0.015 |
| High | | 17 | | | | 3,331 | 3,331 | 1 | 198 | 198 | $ 32,095 | 0.003 |
| Affordability Ratio [6] | | 32 | | | | 4,449 | 4,449 | 1 | 93 | 93 | $ 43,404 | 0.003 |
| Respiratory [7] | | | | | | | | | | | | |
| Low | | 11 | | | | 878 | 878 | 0 | (2) | (2) | $ 44,461 | 0.004 |
| Medium | | 6 | | | | 12,353 | 12,353 | 1 | (17) | (17) | $ 50,820 | 0.047 |
| High | | 16 | | | | 3,762 | 3,762 | 1 | 193 | 193 | $ 39,754 | 0.004 |

Customer Segments:
Households Treated
CARB Communities
Vulnerable
High Energy Burden
SEVI
Affordability Ratio
Respiratory

**NOTES:**

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

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

[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] 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).

[5] 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.

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

[7] Based on Asthma score in CalEnviroScreen 4.0.

## ESA Table 16C MFWB (MF In-unit)

| 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 | Avg. Properties Energy Savings (kWh) / Total Annual Energy Use (kWh) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Rent vs. Own** | | | | | | | | | | | | |
| Own | | 114 | | | | 326 | 326 | 0.04 | 0.32 | 0.32 | $ 543 | 0.00 |
| Rent | | 9,780 | | | | 314 | 314 | 0.03 | 0.83 | 0.83 | $ 465 | 0.00 |
| **Previous vs. New Participant** | | | | | | | | | | | | |
| New | | 9,894 | | | | 314 | 314 | 0.03 | 0.82 | 0.82 | $ 466 | 0.00 |
| Previous | | - | | | | - | - | - | - | - | $ - | - |
| Seniors | | 5,858 | | | | 280 | 280 | 0.02 | 0.26 | 0.26 | $ 480 | 0.00 |
| Veterans | | 166 | | | | 235 | 235 | 0.02 | 0.09 | 0.09 | $ 361 | 0.00 |
| Hard-to-Reach[2] | | 6,830 | | | | 331 | 331 | 0.03 | 0.81 | 0.81 | $ 497 | 0.00 |
| Vulnerable[3] | | 7,872 | | | | 314 | 314 | 0.03 | 0.79 | 0.79 | $ 478 | 0.00 |
| **Location** | | | | | | | | | | | | |
| DAC | | 5,633 | | | | 339 | 339 | 0.03 | 0.80 | 0.80 | $ 499 | 0.00 |
| Rural | | 1,157 | | | | 310 | 310 | 0.05 | 3.17 | 3.17 | $ 422 | 0.00 |
| Tribal | | - | | | | - | - | - | - | - | $ - | - |
| PSPS Zone | | 47 | | | | 100 | 100 | - | 3.79 | 3.79 | $ 220 | 0.00 |
| Wildfire Zone | | 1,192 | | | | 312 | 312 | 0.02 | 0.85 | 0.85 | $ 475 | 0.00 |
| Climate Zone 06 | | 667 | | | | 283 | 283 | 0.03 | 0.54 | 0.54 | $ 457 | 0.00 |
| Climate Zone 08 | | 3,891 | | | | 296 | 296 | 0.02 | (0.05) | (0.05) | $ 421 | 0.00 |
| Climate Zone 09 | | 1,554 | | | | 300 | 300 | 0.02 | 0.20 | 0.20 | $ 583 | 0.00 |
| Climate Zone 10 | | 2,613 | | | | 342 | 342 | 0.01 | 0.46 | 0.46 | $ 496 | 0.00 |
| Climate Zone 13 | | 497 | | | | 283 | 283 | 0.10 | 5.84 | 5.84 | $ 400 | 0.00 |
| Climate Zone 14 | | 268 | | | | 239 | 239 | 0.12 | 9.07 | 9.07 | $ 430 | 0.00 |
| Climate Zone 15 | | 377 | | | | 504 | 504 | 0.23 | 3.12 | 3.12 | $ 376 | 0.00 |
| Climate Zone 16 | | 27 | | | | 330 | 330 | 0.01 | (0.79) | (0.79) | $ 222 | 0.03 |
| CARB Communities[4] | | 1,339 | | | | 194 | 194 | 0.01 | (0.18) | (0.18) | $ 320 | 0.00 |
| **Financial** | | - | | | | | | | | | | |
| CARE | | 6,351 | | | | 327 | 327 | 0.03 | 0.79 | 0.79 | $ 496 | 0.00 |
| FERA | | 47 | | | | 357 | 357 | 0.03 | 0.19 | 0.19 | $ 463 | 0.00 |
| Disconnected | | 26 | | | | 467 | 467 | 0.10 | 3.07 | 3.07 | $ 567 | 0.01 |
| Arrearages | | 1,202 | | | | 378 | 378 | 0.05 | 1.20 | 1.20 | $ 491 | 0.00 |
| High Usage | | 190 | | | | 298 | 298 | 0.03 | 0.87 | 0.87 | $ 496 | 0.00 |
| High Energy Burden [5] | | 2,020 | | | | 312 | 312 | 0.08 | 3.19 | 3.19 | $ 373 | 0.00 |
| SEVI [6] | | | | | | | | | | | | |
| Low | | 750 | | | | 249 | 249 | 0.02 | (0.12) | (0.12) | $ 341 | 0.00 |
| Medium | | 4,134 | | | | 290 | 290 | 0.03 | 0.84 | 0.84 | $ 449 | 0.00 |
| High | | 5,010 | | | | 344 | 344 | 0.04 | 0.95 | 0.95 | $ 498 | 0.00 |
| Affordability Ratio [7] | | 9,839 | | | | 314 | 314 | 0.03 | 0.82 | 0.82 | $ 466 | 0.00 |
| **Health Condition** | | | | | | | | | | | | |
| Medical Baseline | | 264 | | | | 299 | 299 | 0.02 | 0.42 | 0.42 | $ 468 | 0.00 |
| Respiratory[8] | | | | | | | | | | | | |
| Low | | 2,350 | | | | 271 | 271 | 0.04 | 0.19 | 0.19 | $ 396 | 0.00 |
| Medium | | 4,140 | | | | 347 | 347 | 0.03 | 1.16 | 1.16 | $ 563 | 0.00 |
| High | | 3,404 | | | | 303 | 303 | 0.03 | 0.85 | 0.85 | $ 396 | 0.00 |
| Disabled | | 1,649 | | | | 306 | 306 | 0.03 | 0.96 | 0.96 | $ 476 | 0.00 |

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,

[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

[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.

## ESA Table 16D - 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 | Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Demographic** | | | | | | | | | | | | |
| Housing Type | | | | | | | | | | | | |
| SF | 68,689 | 142 | 0% | 59,759 | 0% | 3,284 | - | 0.17 | 70 | - | $ 13,817 | 0.003 |
| MH | N/A | N/A | 0% | N/A | 0% | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| MF In-Unit | N/A | N/A | 0% | N/A | 0% | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| Rent vs. Own [2] | | | | | | | | | | | | |
| Own | 42,895 | 107 | 0% | 37,428 | 0% | 3,436 | - | 0.18 | 69 | - | $ 13,984 | 0.004 |
| Rent | 8,669 | 35 | 0% | 7,558 | 0% | 2,822 | - | 0.17 | 73 | - | $ 13,305 | 0.014 |
| Previous vs. New Participant [3] | | | | | | | | | | | | |
| Previous | 15,341 | 36 | 0% | 13,672 | 0% | 3,122 | - | 0.17 | 54 | | $ 13,198 | 0.004 |
| New Participant | 53,348 | 106 | 0% | 46,087 | 0% | 3,340 | - | 0.17 | 76 | | $ 14,027 | 0.013 |
| Seniors | N/A | N/A | 0% | N/A | 0% | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| Veterans | N/A | N/A | 0% | N/A | 0% | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| Hard-to-Reach | 68,689 | 142 | 0% | 59,759 | 0% | 3,284 | - | 0.17 | 70 | - | $ 13,817 | 0.003 |
| Vulnerable | 44,172 | 3 | 0% | 38,366 | 0% | 7,142 | - | 0.20 | 81 | - | $ 13,643 | 0.097 |
| **Location** | | | | | | | | | | | | |
| DAC | 27,833 | 32 | 0% | 23,420 | 0% | 2,430 | - | 0.18 | 72 | - | $ 12,923 | 0.008 |
| Rural | 11,691 | 75 | 1% | 10,138 | 1% | 3,722 | - | 0.18 | 64 | - | $ 13,555 | 0.007 |
| Tribal | 233 | 1 | 0% | 225 | 0% | 18,766 | - | - | 32 | - | $ 8,639 | 0.000 |
| PSPS Zone | 10,806 | 135 | 1% | 9,320 | 1% | 3,288 | - | 0.17 | 69 | - | $ 13,792 | 0.004 |
| Climate Zone 06 | 1,672 | 0 | 0% | 1,313 | 0% | - | - | - | - | - | $ - | 0.000 |
| Climate Zone 08 | 10,797 | 0 | 0% | 10,030 | 0% | - | - | - | - | - | $ - | 0.000 |
| Climate Zone 09 | 15,445 | 0 | 0% | 13,164 | 0% | - | - | - | - | - | $ - | 0.000 |
| Climate Zone 10 | 27,672 | 141 | 1% | 23,891 | 1% | 3,175 | - | 0.17 | 70 | - | $ 13,854 | 0.003 |
| Climate Zone 13 | N/A | N/A | 0% | N/A | 0% | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| Climate Zone 14 | 9,953 | 0 | 0% | 8,777 | 0% | - | | - | - | | $ - | |
| Climate Zone 15 | 1,706 | 1 | 0% | 1,490 | 0% | 18,766 | - | - | 32 | - | $ 8,639 | 0.000 |
| Climate Zone 16 | 1,050 | 0 | 0% | 796 | 0% | - | - | - | - | - | $ - | |
| CARB Communities | 7,949 | 3 | 0% | 7,671 | 0% | 2,496 | - | 0.27 | 41 | - | $ 15,224 | 0.135 |
| **Financial** | | | | | | | | | | | | |
| CARE | 68,689 | 142 | 0% | 59,759 | 0% | 3,284 | - | 0.17 | 70 | - | $ 13,817 | 0.00 |
| FERA | N/A | N/A | 0% | N/A | 0% | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| Disconnected | 530 | 0 | 0% | 504 | 0% | - | - | - | - | - | $ - | |
| Arrearages | 48,016 | 99 | 0% | 45,311 | 0% | 3,529 | - | 0.16 | 73 | - | $ 14,516 | 0.01 |

| | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| High Usage | 68,689 | 142 | 0% | 59,759 | 0% | 3,284 | - | 0.17 | 70 | - | $ | 13,817 | 0.00 |
| High Energy Burden | 22,556 | 40 | 0% | 28,359 | 0% | 3,983 | - | 0.15 | 60 | - | $ | 13,268.58 | 0.00 |
| SEVI [4] | | | | | | | | | | | | | |
| Low | 10,245 | 18 | 0% | 8,978 | 0% | 3,661 | - | 0.17 | 67 | - | $ | 14,619 | 0.04 |
| Medium | 32,436 | 77 | 0% | 28,217 | 0% | 3,360 | - | 0.17 | 61 | - | $ | 13,266 | 0.01 |
| High | 25,942 | 47 | 0% | 23,279 | 0% | 3,017 | - | 0.18 | 87 | - | $ | 14,412 | 0.01 |
| Affordability Ratio | 53,796 | 32 | 0% | 50,955 | 0% | 3,923 | - | 0.17 | 64 | - | $ | 13,357 | 0.01 |
| **Health Condition** | | | | | | | | | | | | | - |
| Medical Baseline | 1,275 | 4 | 0% | 1,178 | 0% | 4,144 | - | 0.184 | 41.38 | - | $ | 12,371 | 0.11 |
| Respiratory | | | | | | | | | | | | | |
| Low | N/A | N/A | 0% | N/A | 0% | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| Medium | N/A | N/A | 0% | N/A | 0% | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| High | N/A | N/A | 0% | N/A | 0% | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| Disabled | N/A | N/A | 0% | N/A | 0% | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |

[1] Based on entire Program Customer List

[2] Homes with missing Rent vs Own data is not included in the total homes treated

[3] Previous (ESA Enrolled / ESA Treated) vs New (Not ESA Enrolled)

[4] Homes with missing SEVI data is not included in the total homes treated

## ESA Table 16E - 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 | Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Demographic** | | | | | | | | | | | | |
| Housing Type | | | | | 0% | | | | | | | |
| SF | | 350 | | | 0% | 8,280 | 8,280 | 0.13 | 345 | 345 | $ 30,848 | 0.005 |
| MH | | | | | 0% | | | | | | | |
| MF In-Unit | | | | | 0% | | | | | | | |
| Rent vs. Own | | | | | | | | | | | | |
| Own | | 316 | | | 0% | 8,322 | 8,322 | 0 | 348 | 348 | $ 30,792 | 0.006 |
| Rent | | 34 | | | 0% | 7,898 | 7,898 | 0 | 320 | 320 | $ 31,371 | 0.049 |
| Previous vs. New Participant | | | | | | | | | | | | |
| Previous | | | | | 0% | | | | | | | |
| New Participant | | 350 | | | 0% | 8,280 | 8,280 | 0 | 345 | 345 | $ 30,848 | 0.005 |
| Seniors | | | | | 0% | | | | | | | |
| Veterans | | | | | 0% | | | | | | | |
| Hard-to-Reach | | | | | 0% | | | | | | | |
| Vulnerable | | | | | 0% | | | | | | | |
| **Location** | | | | | | | | | | | | |
| DAC | | | | | 0% | | | | | | | |
| Rural | | | | | 0% | | | | | | | |
| Tribal | | | | | 0% | | | | | | | |
| PSPS Zone | | | | | 0% | | | | | | | |
| Wildfire Zone | | | | | 0% | | | | | | | |
| Climate Zone 06 | | 3 | | | 0% | 5,601 | 5,601 | - | 225 | 225 | $ 34,774 | 0.171 |
| Climate Zone 08 | | 28 | | | 0% | 6,905 | 6,905 | - | 276 | 276 | $ 29,824 | 0.050 |
| Climate Zone 09 | | 33 | | | 0% | 7,132 | 7,132 | 0 | 286 | 286 | $ 32,172 | 0.032 |
| Climate Zone 10 | | 84 | | | 0% | 6,707 | 6,707 | 0 | 299 | 299 | $ 28,981 | 0.018 |
| Climate Zone 13 | | 173 | | | 0% | 9,560 | 9,560 | 0 | 392 | 392 | $ 31,903 | 0.013 |
| Climate Zone 14 | | 15 | | | 0% | 9,206 | 9,206 | - | 403 | 403 | $ 28,652 | 0.223 |
| Climate Zone 15 | | 12 | | | 0% | 6,548 | 6,548 | - | 246 | 246 | $ 29,791 | 0.109 |
| Climate Zone 16 | | 2 | | | 0% | 9,339 | 9,339 | - | 451 | 451 | $ 27,450 | 0.416 |
| CARB Communities | | | | | 0% | | | | | | | |
| **Financial** | | | | | | | | | | | | |
| CARE | | 293 | | | 0% | 8,134 | 8,134 | 0.11 | 340 | 340 | $ 30,652 | 0.006 |
| FERA | | 6 | | | 0% | 7,683 | 7,683 | - | 334 | 334 | 30,470 | 0.309 |
| 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 | | 35 | | | 0% | 8,736 | 8,736 | 0.09 | 370 | 370 | 31,562 | 0.046 |
| 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.

# ESA Table 17 - Contractor Advanced Funding and Repayment
## Southern California Edison
## Program Year 2025 Annual Report

| | | A | B | C | D | C + D = E | B - E = F |
|---|---|---|---|---|---|---|---|
| Month | Year | 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 | | $ 321,429 | $ - | $ 322,168 | $ 322,168 | $ (739) |
| November | 2024 | | $ 321,429 | $ - | $ 347,143 | $ 347,143 | $ (25,714) |
| December | 2024 | | $ 321,429 | $ - | $ 307,857 | $ 307,857 | $ 13,571 |
| January | 2025 | | $ 321,429 | $ - | $ 336,429 | $ 336,429 | $ (15,000) |
| February | 2025 | | $ 321,429 | $ - | $ 322,143 | $ 322,143 | $ (714) |
| March | 2025 | | $ 321,429 | $ - | $ 322,143 | $ 322,143 | $ (714) |
| April | 2025 | | $ 321,429 | $ - | $ 297,143 | $ 297,143 | $ 24,286 |
| May | 2025 | | $ 321,429 | $ - | $ 286,429 | $ 286,429 | $ 35,000 |
| June | 2025 | | $ 321,429 | $ - | $ 357,857 | $ 357,857 | $ (36,428) |
| July | 2025 | | $ 321,429 | $ - | $ 236,429 | $ 236,429 | $ 85,000 |
| August | 2025 | | $ 321,429 | $ - | $ 357,857 | $ 357,857 | $ (36,429) |
| September | 2025 | | $ 321,429 | $ - | $ 297,143 | $ 297,143 | $ 24,286 |
| October | 2025 | | $ 321,429 | $ - | $ 282,857 | $ 282,857 | $ 38,571 |
| November | 2025 | | $ 321,429 | $ - | $ 211,429 | $ 211,429 | $ 110,000 |
| December | 2025 | | $ 321,429 | | $ 325,714 | $ 325,714 | $ (4,285) |
| **Total** | | $ 9,000,000 | $ 5,142,858 | $ - | $ 4,932,882 | $ 4,932,882 | $ (4,067,118) |

[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 will track payments, outstanding balances, and the remaining balance of the Advanced Payment on a monthly basis. The May payment for two Prime Contractors was received in June 2025 and is reflected on this report.

**CARE Table 1 - CARE Overall Program Expenses**
**Southern California Edison**
**Program Year 2025 Annual Report**

| Category | Overall Expenditures | | Total | Authorized Budget[1] | % of Budget Spent | Total Shifted[2] | Shifted to/from? |
|---|---|---|---|---|---|---|---|
| | Electric | Gas | | | | | |
| Outreach | $ 1,731,404 | | $ 1,731,404 | $ 3,794,128 | 46% | $(1,426,029) | Shifted to Processing, Certification, Recertification, Measurement & Evaluation, Regulatory Compliance, General Administration, and CPUC Energy Division Staff |
| Processing, Certification, Recertification | $ 1,982,343 | | $ 1,982,343 | $ 1,660,211 | 119% | $322,132 | Shifted from Outreach |
| Post Enrollment Verification | $ 162,061 | | $ 162,061 | $ 524,278 | 31% | | |
| IT Programming | $ 154,616 | | $ 154,616 | $ 570,000 | 27% | | |
| CHANGES | $ 486,962 | | $ 486,962 | $ 525,000 | 93% | | |
| Measurement & Evaluation | $ 75,091 | | $ 75,091 | $ 36,000 | 209% | $ 39,091 | Shifted from Outreach |
| Regulatory Compliance | $ 634,634 | | $ 634,634 | $ 597,354 | 106% | $ 37,280 | Shifted from Outreach |
| General Administration | $ 2,423,028 | | $ 2,423,028 | $ 1,459,095 | 166% | $963,933 | Shifted from Outreach |
| CPUC Energy Division | $ 199,218 | | $ 199,218 | $ 135,625 | 147% | $ 63,593 | Shifted from Outreach |
| | | | | | | | |
| **TOTAL Program Costs** | **$ 7,849,358** | **$ -** | **$ 7,849,358** | **$ 9,301,691** | **84%** | **$0** | |
| | | | | | | | |
| CARE Rate Discount | $ 867,781,311 | | $ 867,781,311 | $ 421,034,721 | 206% | $ - | |
| Service Establishment Charge Discount | $ - | $ - | $ - | $ - | 0% | $ - | |
| | | | | | | | |
| **TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS** | **$ 875,630,669** | **$ -** | **$ 875,630,669** | **$ 430,336,412** | **203%** | **($0)** | |

1. Reflects total authorized funding approved in AL-4536.
2. Reflects fund shift in accordance with the rules set forth in D. 08-11-031 as modified by D. 10-10-008, D. 10-16-11-022, D 17-12-009 and D.21-06-015, which granted the IOUs authority to shift funds between the CARE program

**CARE Table 2 - CARE Enrollment, Recertification, Attrition, and Penetration**
**Southern California Edison**
**Program Year 2025 Annual Report**

| | New Enrollment | | | | | | | | | | Recertification | | | | Attrition (Drop Offs) | | | | | Enrollment | | Total CARE Participants by Dwelling Type[6] | | | Total CARE Participants | Estimated CARE Eligible[7] | Enrollment Rate % (W/X) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Automatic Enrollment | | | | Self-Certification (Income or Categorical) | | | | | Total New Enrollment (E+J) | Scheduled | Non-Scheduled (Duplicates) | Automatic | Total Recertification (L+M+N) | No Response[4] | Failed PEV | Failed Recertification | Other[5] | Total Attrition (P+Q+R+S) | Gross (K+O) | Net Adjusted (K-T) | SF | MF | MH | | | |
| | Inter-Utility[1] | Intra-Utility[2] | Leveraging[3] | Combined (B+C+D) | Online | Paper | Phone | Capitation | Combined (F+G+H+I) | | | | | | | | | | | | | | | | | | |
| **January** | 773 | 475 | 244 | 1,492 | 14,328 | 2,507 | 6,981 | 42 | 23,858 | 25,350 | 10,412 | 1,229 | 12,295 | 23,936 | 17,225 | 10 | 74 | 8,703 | 26,012 | 49,286 | -662 | | | | 1,353,319 | 1,284,448 | 105% |
| **February** | 5 | 95 | 222 | 322 | 12,602 | 3,912 | 6,135 | 71 | 22,720 | 23,042 | 4,911 | 205 | 10,624 | 15,740 | 13,953 | 10 | 52 | 12,330 | 26,345 | 38,782 | -3,303 | | | | 1,350,016 | 1,284,448 | 105% |
| **March** | 0 | 628 | 159 | 787 | 16,034 | 2,841 | 6,959 | 42 | 25,876 | 26,663 | 4,733 | 188 | 6,953 | 11,874 | 30,249 | 1 | 49 | 9,133 | 39,432 | 38,537 | -12,769 | | | | 1,337,247 | 1,284,448 | 104% |
| **April** | 0 | 446 | 266 | 712 | 12,165 | 2,371 | 5,989 | 43 | 20,568 | 21,280 | 7,080 | 178 | 387 | 7,645 | 8,337 | 3 | 56 | 11,995 | 20,391 | 28,925 | 889 | | | | 1,338,136 | 1,284,448 | 104% |
| **May** | 0 | 479 | 308 | 787 | 11,450 | 1,987 | 5,208 | 77 | 18,722 | 19,509 | 8,941 | 175 | 1,323 | 10,439 | 11,508 | 0 | 109 | 13,923 | 25,540 | 29,948 | -6,031 | | | | 1,332,105 | 1,284,448 | 104% |
| **June** | 102 | 322 | 292 | 716 | 6,027 | 2,937 | 7,804 | 111 | 16,879 | 17,595 | 22,449 | 3,023 | 7,371 | 32,843 | 7,132 | 2 | 82 | 14,239 | 21,455 | 50,438 | -3,860 | | | | 1,328,245 | 1,284,448 | 103% |
| **July** | 0 | 438 | 324 | 762 | 6,184 | 5,124 | 8,696 | 87 | 20,091 | 20,853 | 17,759 | 11,020 | 3,984 | 32,763 | 6,240 | 3 | 73 | 12,793 | 19,109 | 53,616 | 1,744 | | | | 1,329,989 | 1,284,448 | 104% |
| **August** | 0 | 373 | 233 | 606 | 10,588 | 4,122 | 8,198 | 92 | 23,000 | 23,606 | 21,763 | 4,400 | 4,246 | 30,409 | 7,012 | 7 | 60 | 10,687 | 17,766 | 54,015 | 5,840 | | | | 1,335,829 | 1,284,448 | 104% |
| **September** | 28 | 302 | 212 | 542 | 22,708 | 5,486 | 7,880 | 130 | 36,204 | 36,746 | 9,621 | 6,135 | 13,353 | 29,109 | 7,925 | 2 | 54 | 13,815 | 21,796 | 65,855 | 14,950 | | | | 1,350,779 | 1,284,448 | 105% |
| **October** | 39 | 269 | 170 | 478 | 15,221 | 2,798 | 6,498 | 103 | 24,620 | 25,098 | 7,148 | 504 | 10,822 | 18,474 | 7,694 | 2 | 34 | 14,505 | 22,235 | 43,572 | 2,863 | | | | 1,353,642 | 1,284,448 | 105% |
| **November** | 1 | 515 | 4 | 520 | 12,608 | 1,698 | 3,977 | 29 | 18,312 | 18,832 | 4,311 | 366 | 7,459 | 12,136 | 5,329 | 3 | 19 | 8,621 | 13,972 | 30,968 | 4,860 | | | | 1,358,502 | 1,284,448 | 106% |
| **December** | 63 | 409 | 247 | 719 | 13,089 | 1,800 | 5,225 | 20 | 20,134 | 20,853 | 4,195 | 208 | 2,244 | 6,647 | 3,168 | 2 | 12 | 12,066 | 15,248 | 27,500 | 5,605 | | | | 1,364,107 | 1,284,448 | 106% |
| **YTD Total** | **1,011** | **4,751** | **2,681** | **8,443** | **153,004** | **37,583** | **79,550** | **847** | **270,984** | **279,427** | **123,323** | **27,631** | **81,061** | **232,015** | **125,772** | **45** | **674** | **142,810** | **269,301** | **511,442** | **10,126** | **838,908** | **348,063** | **32,262** | **1,364,107** | **1,284,448** | **106%** |

[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] Dwelling type is extrapolated from Axle. Only accounts that can be tied back to a customer contract number in the Axle data is included. Other property types outside of SF, MF, and MH are excluded.

[7] Based on the Annual Estimates of CARE and FERA Eligible Customers and Related Information filed on April 15, 2025.

**CARE Table 3 - CARE Post-Enrollment Verification Results**
**Southern California Edison**
**Program Year 2025 Annual Report**

| CARE Table 3A - Post-Enrollment Verification Results (Model) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Month** | **Total CARE Households Enrolled** | **Households Requested to Verify[1]** | **% of CARE Enrolled Requested to Verify Total** | **% of Scheduled Customers not Responsive to the PEV Process** | **% of Scheduled PEV Customers later verified as Income Eligible** | **CARE Households De-enrolled (Due to no response)** | **CARE Households De-enrolled (Verified as Ineligible)[2]** | **Total Households De-enrolled[3]** | **% De-enrolled through Post Enrollment Verification[4]** | **% of Total CARE Households De-enrolled** |
| **January** | 1,353,319 | 1,201 | 0.1% | 77.1% | 22.9% | 926 | 113 | 1,039 | 87% | 0.1% |
| **February** | 1,350,016 | 131 | 0.0% | 15.3% | 84.7% | 20 | 30 | 50 | 38% | 0.0% |
| **March** | 1,337,247 | 4,383 | 0.3% | 3.8% | 96.2% | 166 | 600 | 766 | 17% | 0.1% |
| **April** | 1,338,136 | 388 | 0.0% | 69.1% | 30.9% | 268 | 412 | 680 | 175% | 0.1% |
| **May** | 1,332,105 | 894 | 0.1% | 15.9% | 84.1% | 142 | 399 | 541 | 61% | 0.0% |
| **June** | 1,328,245 | 962 | 0.1% | 17.5% | 82.5% | 168 | 317 | 485 | 50% | 0.0% |
| **July** | 1,329,989 | 833 | 0.1% | 27.3% | 72.7% | 227 | 245 | 472 | 57% | 0.0% |
| **August** | 1,335,829 | 578 | 0.0% | 16.6% | 83.4% | 96 | 227 | 323 | 56% | 0.0% |
| **September** | 1,350,779 | 110 | 0.0% | 55.5% | 44.5% | 61 | 151 | 212 | 193% | 0.0% |
| **October** | 1,353,642 | 158 | 0.0% | 19.6% | 80.4% | 31 | 129 | 160 | 101% | 0.0% |
| **November** | 1,358,502 | 73 | 0.0% | 1.4% | 98.6% | 1 | 15 | 16 | 22% | 0.0% |
| **December** | 1,364,107 | 46 | 0.0% | 47.8% | 52.2% | 22 | 58 | 80 | 174% | 0.0% |
| **YTD Total** | **1,364,107** | **9,757** | **0.7%** | **21.8%** | **78.2%** | **2,128** | **2,696** | **4,824** | **49%** | **0.4%** |

[1] Includes all customers who failed SCE's CARE eligibility probability model.
[2] Includes customers verified as over income or who requested to be de-enrolled.
[3] Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request. Results may be pending due to the time permitted for a
[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.

| CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Month** | **Total CARE Households Enrolled** | **Households Requested to Verify [1]** | **% of CARE Enrolled Requested to Verify Total** | **% of Scheduled Customers not Responsive to the PEV Process** | **% of Scheduled PEV Customers later verified as Income Eligible** | **CARE Households De-enrolled (Due to no response)** | **CARE Households De-enrolled (Verified as Ineligible) [2]** | **Total Households De-enrolled [3]** | **% De-enrolled through HUV Post Enrollment Verification** | **% of Total CARE Households De-enrolled** |
| **January** | 1,353,319 | 157 | 0.0% | 79.0% | 21.0% | 124 | 17 | 141 | 90% | 0.0% |
| **February** | 1,350,016 | 55 | 0.0% | 10.9% | 89.1% | 6 | 14 | 20 | 36% | 0.0% |
| **March** | 1,337,247 | 48 | 0.0% | 31.3% | 68.8% | 15 | 5 | 20 | 42% | 0.0% |
| **April** | 1,338,136 | 1,119 | 0.1% | 79.0% | 21.0% | 884 | 123 | 1,007 | 90% | 0.1% |
| **May** | 1,332,105 | 437 | 0.0% | 85.6% | 14.4% | 374 | 29 | 403 | 92% | 0.0% |
| **June** | 1,328,245 | 477 | 0.0% | 11.7% | 88.3% | 56 | 101 | 157 | 33% | 0.0% |
| **July** | 1,329,989 | 581 | 0.0% | 14.3% | 85.7% | 83 | 113 | 196 | 34% | 0.0% |
| **August** | 1,335,829 | 626 | 0.0% | 89.5% | 10.5% | 560 | 37 | 597 | 95% | 0.0% |
| **September** | 1,350,779 | 572 | 0.0% | 87.8% | 12.2% | 502 | 32 | 534 | 93% | 0.0% |
| **October** | 1,353,642 | 724 | 0.1% | 84.0% | 16.0% | 608 | 49 | 657 | 91% | 0.0% |
| **November** | 1,358,502 | 1,333 | 0.1% | 83.9% | 16.1% | 1,118 | 79 | 1,197 | 90% | 0.1% |
| **December** | 1,364,107 | 1,390 | 0.1% | 16.3% | 83.7% | 226 | 142 | 368 | 26% | 0.0% |
| **YTD Total** | **1,364,107** | **7,519** | **0.6%** | **60.6%** | **39.4%** | **4,556** | **741** | **5,297** | **70%** | **0.4%** |

[1] Includes all participants who were selected for high usage verification process.
[2] Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.
[3] Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.

| CARE Table 3C Post-Enrollment Verification Re-Enrollment Rates (Model) 2025 | | | | | |
|---|---|---|---|---|---|
| **Month Removed [1]** | **Total Customers Removed** | **Re-Enrolled by 6 Months** | **6 Month Re-Enrollment Rate** | **Re-Enrolled by 12 Months [2]** | **12 Month Re-Enrollment Rate** |
| **January 2024** | 954 | 171 | 18% | 258 | 27% |
| **February 2024** | 3 | 1 | 33% | 2 | 67% |
| **March 2024** | 723 | 94 | 13% | 143 | 20% |
| **April 2024** | 0 | 0 | 0% | 0 | 0% |
| **May 2024** | 1 | 1 | 100% | 1 | 100% |
| **June 2024** | 3 | 0 | 0% | 0 | 0% |
| **July 2024** | 0 | 0 | 0% | 0 | 0% |
| **August 2024** | 0 | 0 | 0% | 0 | 0% |
| **September 2024** | 0 | 0 | 0% | 0 | 0% |
| **October 2024** | 93 | 38 | 41% | 44 | 47% |
| **November 2024** | 9 | 0 | 0% | 0 | 0% |
| **December 2024** | 3 | 1 | 33% | 1 | 33% |
| **YTD Total** | **1,789** | **306** | **17%** | **449** | **25%** |

[1] Reflects customers removed in the previous year to allow for the 12 month re-enrollment period
[2] Includes customers re-enrolled by 6 months. Counts may include customers de-enrolled again being initially re-enrolled.

| CARE Table 3D Post-Enrollment Verification Re-Enrollment Rates (High Usage) 2025 | | | | | |
|---|---|---|---|---|---|
| **Month Removed [1]** | **Total Customers Removed** | **Re-Enrolled by 6 Months** | **6 Month Re-Enrollment Rate** | **Re-Enrolled by 12 Months [2]** | **12 Month Re-Enrollment Rate** |
| **January 2024** | 703 | 655 | 93% | 661 | 94% |
| **February 2024** | 73 | 71 | 97% | 71 | 97% |
| **March 2024** | 109 | 109 | 100% | 109 | 100% |
| **April 2024** | 215 | 209 | 97% | 211 | 98% |
| **May 2024** | 52 | 52 | 100% | 52 | 100% |
| **June 2024** | 70 | 53 | 76% | 60 | 86% |
| **July 2024** | 18 | 18 | 100% | 18 | 100% |
| **August 2024** | 2 | 2 | 100% | 2 | 100% |
| **September 2024** | 3 | 3 | 100% | 3 | 100% |
| **October 2024** | 1,515 | 257 | 17% | 358 | 24% |
| **November 2024** | 361 | 46 | 13% | 74 | 20% |
| **December 2024** | 0 | 0 | 0% | 0 | 0% |
| **YTD Total** | **3,121** | **1,475** | **47%** | **1,619** | **52%** |

[1] Reflects customers removed in the previous year to allow for the 12 month re-enrollment period

[2] Includes customers re-enrolled by 6 months. Counts may include customers de-enrolled again being initially re-enrolled.

**CARE Table 4 - CARE Self-Certifications, Self-Recertification Applications and Post-Enrollment Verificiations**
**Southern California Edison**
**Program Year 2025 Annual Report**

| | Provided | Received | Approved | Denied | Pending/Never Completed | Duplicates |
|---|---|---|---|---|---|---|
| Total (Y-T-D) | 1,640,000 | 440,139 | 356,559 | 78,522 | 5,058 | 0 |
| Percentage | | 100% | 81% | 18% | 1% | 0% |

**CARE Table 5 - CARE Enrollment by County**
**Southern California Edison**
**Program Year 2025 Annual Report**

| County | Estimated Eligible[1] | | | Total Participants[2] | | | Enrollment Rate | | |
|---|---|---|---|---|---|---|---|---|---|
| | Urban | Rural | Total | Urban | Rural | Total | Urban | Rural | Total |
| Fresno | 694 | 0 | 694 | 45 | 0 | 45 | 6% | 0% | 6% |
| Imperial | 1 | 296 | 297 | 0 | 35 | 35 | 0% | 12% | 12% |
| Inyo | 10 | 1,619 | 1,629 | 24 | 959 | 983 | 240% | 59% | 60% |
| Kern | 13,285 | 17,079 | 30,364 | 10,564 | 15,003 | 25,567 | 80% | 88% | 84% |
| Kings | 0 | 9,195 | 9,195 | 198 | 10,060 | 10,258 | 0% | 109% | 112% |
| Los Angeles | 506,838 | 3,237 | 510,075 | 558,484 | 2,702 | 561,186 | 110% | 83% | 110% |
| Madera | 2 | 0 | 2 | 0 | 0 | 0 | 0% | 0% | 0% |
| Mariposa | 0 | 1 | 1 | 0 | 0 | 0 | 0% | 0% | 0% |
| Mono | 0 | 2,642 | 2,642 | 12 | 871 | 883 | 0% | 33% | 33% |
| Orange | 192,585 | 1 | 192,586 | 177,075 | 0 | 177,075 | 92% | 0% | 92% |
| Riverside | 91,190 | 91,433 | 182,623 | 97,035 | 107,485 | 204,520 | 106% | 118% | 112% |
| San Bernardino | 180,922 | 39,934 | 220,856 | 209,608 | 42,521 | 252,129 | 116% | 106% | 114% |
| San Diego | 0 | 1 | 1 | 0 | 1 | 1 | 0% | 100% | 100% |
| Santa Barbara | 17,383 | 0 | 17,383 | 9,210 | 0 | 9,210 | 53% | 0% | 53% |
| Tulare | 12,887 | 40,654 | 53,541 | 14,548 | 48,455 | 63,003 | 113% | 119% | 118% |
| Ventura | 60,008 | 2,551 | 62,559 | 57,131 | 2,081 | 59,212 | 95% | 82% | 95% |
| **Total** | **1,075,805** | **208,643** | **1,284,448** | **1,133,934** | **230,173** | **1,364,107** | **105%** | **110%** | **106%** |

[1] Based on the Annual Estimates of CARE and FERA Eligible Customers and Related Information filed on April 15, 2025.

[2] Total Households Enrolled includes submeter tenants.

**CARE Table 6 - CARE Recertification Results**
**Southern California Edison**
**Program Year 2025 Annual Report**

| 2025 | Total CARE Households | Households Requested to Recertify [1] | % of Households Total (C/B) | Households Recertified [2, 5] | Households De-enrolled [3] | Recertification Rate % [4] (E/C) | % of Total Households De-enrolled (F/B) |
|---|---|---|---|---|---|---|---|
| January | 1,353,319 | 21,029 | 1.6% | 3,959 | 7,542 | 19% | 0.56% |
| February | 1,350,016 | 12,975 | 1.0% | 3,945 | 10,646 | 30% | 0.79% |
| March | 1,337,247 | 44,866 | 3.4% | 5,348 | 7,678 | 12% | 0.57% |
| April | 1,338,136 | 35,128 | 2.6% | 6,684 | 5,883 | 19% | 0.44% |
| May | 1,332,105 | 35,480 | 2.7% | 7,468 | 7,465 | 21% | 0.56% |
| June | 1,328,245 | 56,172 | 4.2% | 8,461 | 8,128 | 15% | 0.61% |
| July | 1,329,989 | 46,716 | 3.5% | 5,761 | 7,084 | 12% | 0.53% |
| August | 1,335,829 | 14,488 | 1.1% | 2,666 | 4,517 | 18% | 0.34% |
| September | 1,350,779 | 6,798 | 0.5% | 1,866 | 2,834 | 27% | 0.21% |
| October | 1,353,642 | 8,399 | 0.6% | 2,196 | 4,559 | 26% | 0.34% |
| November | 1,358,502 | 8,527 | 0.6% | 1,629 | 4,024 | 19% | 0.30% |
| December | 1,364,107 | 7,932 | 0.6% | 1,415 | 928 | 18% | 0.07% |
| **YTD** | **1,364,107** | **298,510** | **21.88%** | **51,398** | **71,288** | **17%** | **5.23%** |

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

[2] Recertification results are tied to the month initiated and the recertification process allows customers 90 days (3 or 4 bill cycles) to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.

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

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

**CARE Table 7 - CARE Capitation Contractors**
**Southern California Edison**
**Program Year 2025 Annual Report**

| Contractor Name [1] | Contractor Type (Check one or more if applicable) | | | | Enrollments[2] | | | Total Expenditures |
|---|---|---|---|---|---|---|---|---|
| | Private | CBO | WMDVBE | LIHEAP | Rural | Urban | Total | |
| 2-1-1 ORANGE COUNTY | | x | | | - | 10 | 10 | $ 300 |
| ALPHA ENTERPRISES | | x | | | - | - | - | $ - |
| APAC SERVICE CENTER | x | | | | - | 26 | 26 | $ 780 |
| ARMENIAN RELIEF SOCIETY | x | | | | - | - | - | $ - |
| ASIAN AMERICAN DRUG ABUSE PROG | x | | | | - | - | - | $ - |
| ASIAN AMERICAN RESOURCE CENTER | x | | x | | 1 | 39 | 40 | $ 1,200 |
| ASIAN YOUTH CENTER | x | | | | - | - | - | $ - |
| BEST PARTNERS | x | | | | 5 | 623 | 628 | $ 18,840 |
| 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 | | - | 1 | 1 | $ 30 |
| COMMUNITY HEALTH INITIATIVE of OC | | x | | | - | - | - | $ - |
| DELHI CENTER | x | | | | - | - | - | $ - |
| DESERT COMMUNITY ENERGY | | x | | | - | - | - | $ - |
| DESERT MANNA MINISTRIES INC | x | | | | - | - | - | $ - |
| DESIGNATED EXCEPTIONAL SERVICES | | x | | | - | 2 | 2 | $ 60 |
| DISABLED RESOURCES CTR, INC | | x | x | | - | 55 | 55 | $ 1,650 |
| EL CONCILIO DEL CONDADO DE | x | | x | | - | - | - | $ - |
| FAMILY SVC ASSOC OF REDLANDS | x | | | | - | - | - | $ - |
| FOOD SHARE | x | | | | - | - | - | $ - |
| GO THE CALENDAR | | x | | | - | - | - | $ - |
| GRID ALTERNATIVES INLAND EMPIRE INC | | | x | | 3 | 1 | 4 | $ 120 |
| HELP OF OJAI, INC. | x | | | | - | - | - | $ - |
| HOUSING AUTHORITY OF KINGS CO | x | | x | | - | - | - | $ - |
| INLAND SOCAL 211+ | x | x | | | 18 | 36 | 54 | $ 1,620 |
| KERNVILLE UNION SCHOOL DISTRIC | x | | | | - | - | - | $ - |
| KINGS COMMUNTITY ACTION ORG | x | | | | - | - | - | $ - |
| KINGS CTY COMMISSION ON AGING | x | | | | - | - | - | $ - |
| LA COUNTY HOUSING AUTHORITY | | x | | | - | - | - | $ - |
| LEAGUE OF CALIF HOMEOWNERS | x | | | | - | - | - | $ - |
| LIFT TO RISE | x | | | | - | - | - | $ - |
| LTSC COMM. DEVEL. CORP | x | | | | - | 5 | 5 | $ 150 |
| MENIFEE VALLEY CHAMBER OF COMMERCE | | x | | | - | - | - | $ - |
| MEXICAN AMERICAN OPPORTUNITY | | x | x | | - | - | - | $ - |
| MTN COMM FAM RESOURCE CNTR | x | | | | 1 | - | 1 | $ 30 |
| NEW GREATER CIR. MISSION, INC | x | | | | - | - | - | $ - |
| NEW HOPE VILLAGE, INC | x | | | | - | 1 | 1 | $ 30 |
| NEW HORIZONS CAREGIVERS GROUP | | x | | | - | 1 | 1 | $ 30 |
| OCCC | x | | | | - | - | - | $ - |
| OPERATION GRACE | x | | | | - | - | - | $ - |
| OUR COMMUNITY WORKS | x | | | | - | 19 | 19 | $ 570 |
| PACIFIC ISLANDER HLTH (PIHP) | x | | | | - | - | - | $ - |
| PACIFIC PRIDE FOUNDATION | x | | | | - | - | - | $ - |
| PRM CONSULTING, INC. | x | x | x | | - | - | - | $ - |
| RIVERSIDE DEPT COMM ACTION | | x | x | x | - | - | - | $ - |
| SALVATION ARMY SANTA FE SPGS | x | | | | - | - | - | $ - |
| SALVATION ARMY VISALIA CORPS | x | | | | - | - | - | $ - |
| SANTA ANITA FAMILY SERVICE | x | | | | - | - | - | $ - |
| SENIOR ADVOCATES OF THE DESERT | x | | | | - | - | - | $ - |
| SHARE OUR SELVES | x | | | | - | - | - | $ - |
| SHIELDS FOR FAMILIES | x | x | | | - | - | - | $ - |
| 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 | | | - | - | - | $ - |
| | | | | | **28** | **819** | **847** | **$ 25,410** |

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

[2] Enrollments reflect new enrollments only.

**CARE Table 8 - CARE Participants as of Month-End**
**Southern California Edison**
**Program Year 2025 Annual Report**

| | Gas and Electric | Gas Only | Electric Only | Total | Eligible Households | Enrollment Rate | % Change |
|---|---|---|---|---|---|---|---|
| **January** | | | 1,353,319 | 1,353,319 | 1,284,448 | 105% | |
| **February** | | | 1,350,016 | 1,350,016 | 1,284,448 | 105% | -0.26% |
| **March** | | | 1,337,247 | 1,337,247 | 1,284,448 | 104% | -0.99% |
| **April** | | | 1,338,136 | 1,338,136 | 1,284,448 | 104% | 0.07% |
| **May** | | | 1,332,105 | 1,332,105 | 1,284,448 | 104% | -0.47% |
| **June** | | | 1,328,245 | 1,328,245 | 1,284,448 | 103% | -0.30% |
| **July** | | | 1,329,989 | 1,329,989 | 1,284,448 | 104% | 0.14% |
| **August** | | | 1,335,829 | 1,335,829 | 1,284,448 | 104% | 0.45% |
| **September** | | | 1,350,779 | 1,350,779 | 1,284,448 | 105% | 1.16% |
| **October** | | | 1,353,642 | 1,353,642 | 1,284,448 | 105% | 0.22% |
| **November** | | | 1,358,502 | 1,358,502 | 1,284,448 | 106% | 0.38% |
| **December** | | | 1,364,107 | 1,364,107 | 1,284,448 | 106% | 0.44% |

**CARE Table 9 - CARE Average Monthly Usage and Bill**
**Southern California Edison**
**Program Year 2025 Annual Report**

| Average Monthly Gas / Electric Usage | | | |
|---|---|---|---|
| **Residential Non-CARE vs. CARE Customers** | | | |
| **Customer** | **Gas Therms Tier 1** | **Gas Therms Tier 2** | **Total** |
| Non-CARE | 10.2 | 2.8 | 12.9 |
| CARE | 12.4 | 2.1 | 14.5 |
| **Customer** | **Electric KWh Tier 1** | **Electric KWh Tier 2 and Above** | **Total** |
| Non-CARE | 304 | 145 | 450 |
| CARE | 348 | 140 | 488 |

| Average Monthly Gas / Electric Bill | | |
|---|---|---|
| **Residential Non-CARE vs. CARE Customers[1]** | | |
| **(Dollars per Customer)** | | |
| **Customer** | **Gas** | **Electric** |
| Non-CARE | $136.47 | $138.35 |
| CARE | $155.75 | $90.44 |

[1] Excludes master-meter usage.

**CARE Table 10 - CARE Surcharge and Revenue**
**Southern California Edison**
**Program Year 2025 Annual Report**

**CARE Table 10A**
**CARE Electric Surcharge and Revenue Collected by Customer Class**

| Customer Class | Average Monthly CARE Surcharge[1] | Average Monthly Bill | CARE Surcharge as Percent of Bill | Total CARE Surcharge Revenue Collected | Percentage of CARE Surcharge Revenue Collected |
|---|---|---|---|---|---|
| Residential | $22,239,838 | $557,273,907 | 4% | $266,878,053 | 27.29% |
| Agricultural | $1,732,042 | $27,000,777 | 6% | $20,784,506 | 2.13% |
| Commercial | $49,869,318 | $662,274,689 | 8% | $598,412,597 | 61.19% |
| Industrial | $3,819,934 | $38,247,400 | 10% | $45,839,212 | 4.69% |
| Public Authority | $3,766,827 | $46,436,003 | 8% | $45,195,684 | 4.62% |
| Railroad and Railways | $75,773 | $1,170,367 | 6% | $909,271 | 0.09% |
| Interdepartmental | $894 | $18,915 | 5% | $10,722 | 0.00% |

**CARE Table 10B**
**CARE Gas Surcharge and Revenue Collected by Customer Class**

| Customer Class | Average Monthly CARE Surcharge[1] | Average Monthly Bill | CARE Surcharge as Percent of Bill | Total CARE Surcharge Revenue Collected | Percentage of CARE Surcharge Revenue Collected |
|---|---|---|---|---|---|
| Residential | $19,337 | $177,598 | 11% | $232,049 | 20% |
| Commercial | $75,570 | $283,227 | 27% | $906,843 | 80% |

[1] Excludes CARE customers. Pursuant to D. 15-07-001, OP 4 and Section 11.1.1 authorizes adjustments to CARE to transition to the legislatively-mandated CARE discount range in compliance with Section 739.1 were authorized. Effective 9/1/15 per AL 2783-E, CARE customers receive non-CARE rates; therefore, there is no longer a CARE Rate subsidy.

**CARE Table 11 - CARE Capitation Applications[1]**
**Southern California Edison**
**Program Year 2025 Annual Report**

| Entity | Total Received | Approved[2] | Denied | Pending/ Never Completed | Duplicate |
|---|---|---|---|---|---|
| 2-1-1 ORANGE COUNTY | 19 | 15 | 4 | 0 | 0 |
| ALPHA ENTERPRISES | 0 | 0 | 0 | 0 | 0 |
| APAC SERVICE CENTER | 36 | 31 | 5 | 0 | 0 |
| ARMENIAN RELIEF SOCIETY | 0 | 0 | 0 | 0 | 0 |
| ASIAN AMERICAN DRUG ABUSE PROG | 0 | 0 | 0 | 0 | 0 |
| ASIAN AMERICAN RESOURCE CENTER | 60 | 41 | 19 | 0 | 0 |
| ASIAN YOUTH CENTER | 0 | 0 | 0 | 0 | 0 |
| BEST PARTNERS | 1,102 | 956 | 146 | 0 | 0 |
| BETHEL BAPTIST CHURCH | 0 | 0 | 0 | 0 | 0 |
| BISHOP PAIUTE TRIBE | 0 | 0 | 0 | 0 | 0 |
| C.O.R. COMM DEVELOPMENT CORP | 0 | 0 | 0 | 0 | 0 |
| CAREGIVERS VOLUNTEERS ELDERLY | 0 | 0 | 0 | 0 | 0 |
| CHINESE CHRISTIAN HERALD CRUS. | 0 | 0 | 0 | 0 | 0 |
| CHINO NEIGHBORHOOD HOUSE | 0 | 0 | 0 | 0 | 0 |
| CITIHOUSING REAL ESTATE SERVIC | 0 | 0 | 0 | 0 | 0 |
| CITY IMPACT | 0 | 0 | 0 | 0 | 0 |
| CITY OF BEAUMONT SENIOR CENTER | 1 | 1 | 0 | 0 | 0 |
| COMMUNITY HEALTH INITIATIVE of OC | 0 | 0 | 0 | 0 | 0 |
| DELHI CENTER | 0 | 0 | 0 | 0 | 0 |
| DESERT COMMUNITY ENERGY | 0 | 0 | 0 | 0 | 0 |
| DESERT MANNA MINISTRIES INC | 0 | 0 | 0 | 0 | 0 |
| DESIGNATED EXCEPTIONAL SERVICES | 0 | 0 | 0 | 0 | 0 |
| DISABLED RESOURCES CTR, INC | 75 | 61 | 14 | 0 | 0 |
| EL CONCILIO DEL CONDADO DE | 0 | 0 | 0 | 0 | 0 |
| FAMILY SVC ASSOC OF REDLANDS | 0 | 0 | 0 | 0 | 0 |
| FOOD SHARE | 0 | 0 | 0 | 0 | 0 |
| GO THE CALENDAR | 0 | 0 | 0 | 0 | 0 |
| GRID ALTERNATIVES INLAND EMPIRE INC | 0 | 0 | 0 | 0 | 0 |
| HELP OF OJAI, INC. | 0 | 0 | 0 | 0 | 0 |
| HOUSING AUTHORITY OF KINGS CO | 0 | 0 | 0 | 0 | 0 |
| INLAND SOCAL 211+ | 89 | 60 | 29 | 0 | 0 |
| KERNVILLE UNION SCHOOL DISTRIC | 0 | 0 | 0 | 0 | 0 |
| KINGS COMMUNTITY ACTION ORG | 0 | 0 | 0 | 0 | 0 |
| KINGS CTY COMMISSION ON AGING | 0 | 0 | 0 | 0 | 0 |
| LA COUNTY HOUSING AUTHORITY | 0 | 0 | 0 | 0 | 0 |
| LEAGUE OF CALIF HOMEOWNERS | 0 | 0 | 0 | 0 | 0 |
| LIFT TO RISE | 0 | 0 | 0 | 0 | 0 |
| LTSC COMM. DEVEL. CORP | 5 | 5 | 0 | 0 | 0 |
| MENIFEE VALLEY CHAMBER OF COMMERCE | 0 | 0 | 0 | 0 | 0 |
| MEXICAN AMERICAN OPPORTUNITY | 0 | 0 | 0 | 0 | 0 |
| MTN COMM FAM RESOURCE CNTR | 3 | 1 | 2 | 0 | 0 |
| NEW GREATER CIR. MISSION, INC | 0 | 0 | 0 | 0 | 0 |
| NEW HOPE VILLAGE, INC | 1 | 1 | 0 | 0 | 0 |
| NEW HORIZONS CAREGIVERS GROUP | 1 | 1 | 0 | 0 | 0 |
| OCCC | 1 | 1 | 0 | 0 | 0 |
| OPERATION GRACE | 0 | 0 | 0 | 0 | 0 |
| OUR COMMUNITY WORKS | 28 | 25 | 3 | 0 | 0 |

| | | | | | |
|---|---|---|---|---|---|
| PACIFIC ISLANDER HLTH (PIHP) | 0 | 0 | 0 | 0 | 0 |
| PACIFIC PRIDE FOUNDATION | 0 | 0 | 0 | 0 | 0 |
| PRM CONSULTING, INC. | 0 | 0 | 0 | 0 | 0 |
| RIVERSIDE DEPT COMM ACTION | 0 | 0 | 0 | 0 | 0 |
| SALVATION ARMY SANTA FE SPGS | 0 | 0 | 0 | 0 | 0 |
| SALVATION ARMY VISALIA CORPS | 0 | 0 | 0 | 0 | 0 |
| SANTA ANITA FAMILY SERVICE | 0 | 0 | 0 | 0 | 0 |
| SENIOR ADVOCATES OF THE DESERT | 0 | 0 | 0 | 0 | 0 |
| SHARE OUR SELVES | 0 | 0 | 0 | 0 | 0 |
| SHIELDS FOR FAMILIES | 1 | 0 | 1 | 0 | 0 |
| SMILES FOR SENIORS FOUND. | 0 | 0 | 0 | 0 | 0 |
| SOUTHEAST CITIES SERVICE CTR. | 0 | 0 | 0 | 0 | 0 |
| SOUTHEAST COMMUNITY DEVELOPMEN | 0 | 0 | 0 | 0 | 0 |
| ST VINCENT DE PAUL | 0 | 0 | 0 | 0 | 0 |
| THE CAMBODIAN FAMILY | 0 | 0 | 0 | 0 | 0 |
| UNITED CAMBODIAN COMMUNITY INC | 0 | 0 | 0 | 0 | 0 |
| VIETNAMESE COMMUNITY OF OC INC | 0 | 0 | 0 | 0 | 0 |
| VOLUTNEERS OF EAST LOS ANGELES | 0 | 0 | 0 | 0 | 0 |
| XFINITI SOLUTIONS, LLC | 0 | 0 | 0 | 0 | 0 |
| **Total** | **1,422** | **1,199** | **223** | **0** | **0** |

[1] Includes sub-metered customers.

[2] Includes new enrollments and recertification applications approved.

**CARE Table 12 - CARE Expansion Program**
**Southern California Edison**
**Program Year 2025 Annual Report**

**CARE Table 12A**

| 2024 | Gas | | | Electric | | |
|---|---|---|---|---|---|---|
| | CARE Residential Facilities | CARE Commercial Facilities | Total Gas | CARE Residential Facilities | CARE Commercial Facilities | Total Electric |
| **January** | N/A | N/A | N/A | 362 | 133 | 495 |
| **February** | N/A | N/A | N/A | 357 | 132 | 489 |
| **March** | N/A | N/A | N/A | 358 | 134 | 492 |
| **April** | N/A | N/A | N/A | 368 | 135 | 503 |
| **May** | N/A | N/A | N/A | 373 | 146 | 519 |
| **June** | N/A | N/A | N/A | 372 | 146 | 518 |
| **July** | N/A | N/A | N/A | 371 | 146 | 517 |
| **August** | N/A | N/A | N/A | 372 | 145 | 517 |
| **September** | N/A | N/A | N/A | 382 | 145 | 527 |
| **October** | N/A | N/A | N/A | 381 | 145 | 526 |
| **November** | N/A | N/A | N/A | 383 | 146 | 529 |
| **December** | N/A | N/A | N/A | 385 | 147 | 532 |

**CARE Table 12B**
**Average Monthly Gas / Electric Usage[1]**

| Customer | Gas | Electric |
|---|---|---|
| | Therms | KWh |
| Residential Facilities | N/A | 846 |
| Commercial Facilities | N/A | 9,544 |

**CARE Table 12C**
**Expansion Self-Certification and Self-Recertification Applications[2]**

| | Received | Approved | Denied/ Canceled | Pending/Never Completed | Duplicates |
|---|---|---|---|---|---|
| Total | 245 | 165 | 12 | 68 | 0 |
| Percentage | | 67% | 5% | 28% | 0% |

[1] Excludes master meter usage.
[2] Per D.21-06-025, OP 6, Recertifications for the CARE Expansion program were extended from two years to four years.

**CARE Table 13 - CARE High Usage Verification Results[5]**
**Southern California Edison**
**Program Year 2025 Annual Report**

| Stage 1 - Income Documentation and ESA Agreement | | | | Stage 2 - ESA Participation | | | Stage 3 - Usage Monitoring | | |
|---|---|---|---|---|---|---|---|---|---|
| Households Requested to Verify | Removed (No Response) | Removed (Verified Ineligible)[1] | Income Verified and Referred to ESA | Failed and Removed[2] | Ineligible[3] | Completed | Removed[4] | Appeals Denied | Appeals Approved |
| 7,519 | 4,556 | 741 | 447 | 210 | 12 | 38 | 0 | 0 | 0 |

[1] Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.

[2] Includes customers who declined to participate in ESA Program, failed to respond to appointment requests, or missed multiple appointments or denied access to all rooms.

[3] Includes customers who previously participated in ESA Program, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.

[4] Customers removed for exceeding 600% of baseline in any monthly billing cycle.

[5] High usage is defined as a customer that exceeds 400% or 600% of baseline.

**CARE Table 14 - CARE Customer Usage and ESA Program Treatment**
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| # of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV [1] | Percent of those CARE customers Not served by ESA Program [2] | # of Enrollments led to ESA Program measure Installations | # of Long-Term tenancy CARE customers who have Not applied for ESA Program [2] | Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment [1] [3] | | | | Energy Usage of CARE customers who do Not accept ESA Program treatment [3] |
|---|---|---|---|---|---|---|---|---|
| | | | | Energy Usage before ESA Program treatment | Energy Usage within 3-months of ESA Program treatment | Energy Usage within 6-months of ESA Program treatment | Energy Usage within 12-months of ESA Program treatment | |
| 141,992 | 85% | 9,113 | 120,859 | 985 | 1,146 | 1,052 | 1,039 | 1,076 |

[1] Long-Term Tenancy CARE customers are those who have been enrolled in the program and stayed at the same meter for over 6 years.
[2] Customers who have not participated in ESA since 2020
[3] Reflects average monthly kWh usage

**CARE Table 15 - CARE Categorical Enrollment**
**Southern California Edison**
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| Type of Enrollment | Number of Customer Enrollments[1] |
|---|---|
| Bureau of Indian Affairs General Assistance | 194 |
| CalFresh/Supplemental Nutrition Assistance Program - Food Stamps | 84,763 |
| CalWORKs/Temporary Assistance for Needy Families (TANF) [2] | |
| Head Start Income Eligible - (Tribal Only) | 448 |
| Healthy Families A&B[3] | |
| Low-income Home Energy Assistance Program (LIHEAP) | 10,386 |
| Medicaid/Medi-Cal | 178,039 |
| National School Lunch Program (NSLP) - Free Lunch | 21,848 |
| Supplemental Security Income (SSI) | 22,871 |
| Tribal TANF [2] | 10,993 |
| Women, Infants, and Children Program (WIC) | 24,734 |

[1] Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account.

[2] CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.

[3] Healthy Families A&B are bundled with Medi-Cal for Families.

## CARE Table 16 - CARE and Disadvantaged Communities Enrollment Rate for Zip Codes
## Southern California Edison
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| 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 Trac) Codes in High Poverty (with 70% or Less CARE Enrollment Rate) [3] |
| January | 38% | 95% | 45% | 58% |
| February | 38% | 95% | 45% | 58% |
| March | 38% | 94% | 44% | 57% |
| April | 38% | 93% | 44% | 57% |
| May | 38% | 93% | 44% | 57% |
| June | 38% | 93% | 44% | 57% |
| July | 38% | 93% | 44% | 57% |
| August | 38% | 93% | 44% | 57% |
| September | 38% | 94% | 44% | 58% |
| October | 38% | 94% | 45% | 58% |
| November | 38% | 94% | 45% | 58% |
| December | 38% | 95% | 45% | 58% |
| **YTD** | 38% | 95% | 45% | 58% |

[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.

## FERA Table 1 - FERA Overall Program Expenses
## Southern California Edison
## Program Year 2025 Annual Report

| Category | Overall Expenditures | | Total | Authorized Budget[1] | % of Budget Spent | Total Shifted[2] | Shifted to/from? |
|---|---|---|---|---|---|---|---|
| | Electric | Gas | | | | | |
| Marketing, Education, & Outreach | $ 779,716 | | $ 779,716 | $ 877,766 | 89% | | |
| Processing, Certification, Recertification | $ 121,246 | | $ 121,246 | $ 415,053 | 29% | $ 20,454 | Shifted to General Administration |
| Post Enrollment Verification | $ 11,369 | | $ 11,369 | $ 131,069 | 9% | | |
| IT Programming | $ - | | $ - | $ 30,000 | 0% | | |
| Pilots | $ - | | $ - | $ - | 0% | | |
| Measurement & Evaluation | $ - | | $ - | $ 24,000 | 0% | | |
| Regulatory Compliance | $ - | | $ - | $ 19,270 | 0% | | |
| General Administration | $ 67,522 | | $ 67,522 | $ 47,068 | 143% | $ (20,454) | Shifted from Processing, Certification, Recertification |
| CPUC Energy Division | $ - | | $ - | $ 4,375 | 0% | | |
| | | | | | | | |
| **TOTAL Program Costs** | **$ 979,853** | **$ -** | **$ 979,853** | **$ 1,548,601** | **63%** | **$0** | |
| | | | | | | | |
| FERA Rate Discount | **$ 14,937,883** | | **$ 14,937,883** | **$ 51,506,652** | 29% | $ - | |
| Service Establishment Charge Discount | $ - | $ - | **$ -** | $ - | 0% | $ - | |
| | | | | | | | |
| **TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS** | **$ 15,917,736** | **$ -** | **$ 15,917,736** | **$ 53,055,253** | **30%** | **$ -** | |

1. Reflects total authorized funding approved in AL-4536.
2. Reflects fund shift in accordance with the rules set forth in D.21-06-015, which granted the IOUs authority to shift funds between the FERA program categories.

**FERA Table 2 - FERA Enrollment, Recertification, Attrition, & Penetration**
**Southern California Edison**
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| | New Enrollment | | | | | | | | | | Recertification | | | | Attrition (Drop Offs) | | | | | Enrollment | | Total FERA Participants by Dwelling Type[6] | | | Total FERA Participants | Estimated FERA Eligible[7] | Enrollment Rate % (W/X) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Automatic Enrollment | | | | Self-Certification (Income or Categorical) | | | | | Total New Enrollment (E+J) | Scheduled | Non-Scheduled (Duplicates) | Automatic | Total Recertification (L+M+N) | No Response [4] | Failed PEV | Failed Recertification | Other [5] | Total Attrition (P+Q+R+S) | Gross (K+O) | Net Adjusted (K-T) | SF | MF | MH | | | |
| | Inter-Utility [1] | Intra-Utility [2] | Leveraging [3] | Combined (B+C+D) | Online | Paper | Phone | Capitation | Combined (F+G+H+I) | | | | | | | | | | | | | | | | | | |
| **January** | 0 | 45 | 0 | 45 | 604 | 39 | 95 | 0 | 738 | 783 | 169 | 47 | 0 | 216 | 929 | 0 | 5 | 166 | 1,100 | 999 | -317 | | | | 32,176 | 357,233 | 9% |
| **February** | 0 | 8 | 0 | 8 | 563 | 53 | 104 | 0 | 720 | 728 | 108 | 36 | 0 | 144 | 649 | 0 | 5 | 265 | 919 | 872 | -191 | | | | 31,985 | 357,233 | 9% |
| **March** | 0 | 139 | 0 | 139 | 744 | 30 | 92 | 1 | 867 | 1,006 | 86 | 18 | 0 | 104 | 1,181 | 0 | 7 | 126 | 1,314 | 1,110 | -308 | | | | 31,677 | 357,233 | 9% |
| **April** | 0 | 58 | 0 | 58 | 526 | 24 | 79 | 0 | 629 | 687 | 306 | 15 | 20 | 341 | 372 | 0 | 5 | 217 | 594 | 1,028 | 93 | | | | 31,770 | 357,233 | 9% |
| **May** | 0 | 121 | 0 | 121 | 533 | 19 | 59 | 0 | 611 | 732 | 197 | 16 | 17 | 230 | 613 | 0 | 9 | 464 | 1,086 | 962 | -354 | | | | 31,416 | 357,233 | 9% |
| **June** | 0 | 528 | 0 | 528 | 422 | 150 | 260 | 0 | 832 | 1,360 | 660 | 48 | 173 | 881 | 292 | 0 | 4 | 103 | 399 | 2,241 | 961 | | | | 32,377 | 357,233 | 9% |
| **July** | 0 | 480 | 0 | 480 | 461 | 313 | 330 | 1 | 1,105 | 1,585 | 493 | 185 | 115 | 793 | 288 | 0 | 5 | 104 | 397 | 2,378 | 1,188 | | | | 33,565 | 357,233 | 9% |
| **August** | 0 | 473 | 0 | 473 | 998 | 220 | 359 | 0 | 1,577 | 2,050 | 499 | 70 | 214 | 783 | 264 | 0 | 7 | 40 | 311 | 2,833 | 1,739 | | | | 35,304 | 357,233 | 10% |
| **September** | 0 | 336 | 0 | 336 | 2,901 | 288 | 347 | 0 | 3,536 | 3,872 | 233 | 109 | 295 | 637 | 313 | 1 | 4 | -988 | -670 | 4,509 | 4,542 | | | | 39,846 | 357,233 | 11% |
| **October** | 0 | 276 | 0 | 276 | 1,706 | 139 | 300 | 0 | 2,145 | 2,421 | 153 | 16 | 312 | 481 | 293 | 0 | 5 | 133 | 431 | 2,902 | 1,990 | | | | 41,836 | 357,233 | 12% |
| **November** | 0 | 673 | 0 | 673 | 1,385 | 84 | 160 | 0 | 1,629 | 2,302 | 112 | 10 | 234 | 356 | 263 | 0 | 2 | 142 | 407 | 2,658 | 1,895 | | | | 43,731 | 357,233 | 12% |
| **December** | 0 | 376 | 0 | 376 | 1,455 | 86 | 260 | 0 | 1,801 | 2,177 | 97 | 6 | 56 | 159 | 131 | 0 | 0 | 136 | 267 | 2,336 | 1,910 | | | | 45,641 | 357,233 | 13% |
| **YTD Total** | **0** | **3,513** | **0** | **3,513** | **12,298** | **1,445** | **2,445** | **2** | **16,190** | **19,703** | **3,113** | **576** | **1,436** | **5,125** | **5,588** | **1** | **58** | **908** | **6,555** | **24,828** | **13,148** | **33,253** | **9,272** | **526** | **45,641** | **357,233** | **13%** |

[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 14, 2025.

[7] Dwelling type is extrapolated from Axle. Only accounts that can be tied back to a customer contract number in the Axle data is included. Other property types outside of SF, MF, and MH are excluded.

**FERA Table 3 - FERA Post-Enrollment Verification Results**
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| FERA Table 3A - Post-Enrollment Verification Results (Model) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Month** | **Total FERA Households Enrolled** | **Households Requested to Verify[1]** | **% of FERA Enrolled Requested to Verify Total** | **% of Scheduled Customers not Responsive to the PEV Process** | **% of Scheduled PEV Customers later verified as Income Eligible** | **FERA Households De-enrolled (Due to no response)** | **FERA Households De-enrolled (Verified as Ineligible)[2]** | **Total Households De-enrolled[3]** | **% De-enrolled through Post Enrollment Verification[4]** | **% of Total FERA Households De-enrolled** |
| **January** | 32,176 | 65 | 0.2% | 90.8% | 9.2% | 59 | 5 | 64 | 98.5% | 0.20% |
| **February** | 31,985 | 10 | 0.0% | 40.0% | 60.0% | 4 | 2 | 6 | 60.0% | 0.02% |
| **March** | 31,677 | 262 | 0.8% | 15.6% | 84.4% | 41 | 47 | 88 | 33.6% | 0.28% |
| **April** | 31,770 | 49 | 0.2% | 49.0% | 51.0% | 24 | 6 | 30 | 61.2% | 0.09% |
| **May** | 31,416 | 64 | 0.2% | 18.8% | 81.3% | 12 | 9 | 21 | 32.8% | 0.07% |
| **June** | 32,377 | 69 | 0.2% | 13.0% | 87.0% | 9 | 7 | 16 | 23.2% | 0.05% |
| **July** | 33,565 | 103 | 0.3% | 24.3% | 75.7% | 25 | 12 | 37 | 35.9% | 0.11% |
| **August** | 35,304 | 80 | 0.2% | 31.3% | 68.8% | 25 | 8 | 33 | 41.3% | 0.09% |
| **September** | 39,846 | 79 | 0.2% | 10.1% | 89.9% | 8 | 5 | 13 | 16.5% | 0.03% |
| **October** | 41,836 | 164 | 0.4% | 11.6% | 88.4% | 19 | 14 | 33 | 20.1% | 0.08% |
| **November** | 43,731 | 32 | 0.1% | 15.6% | 84.4% | 5 | 16 | 21 | 65.6% | 0.05% |
| **December** | 45,641 | 54 | 0.1% | 0.0% | 100.0% | 0 | 2 | 2 | 3.7% | 0.00% |
| **YTD Total** | **45,641** | **1,031** | **2.3%** | **22.4%** | **77.6%** | **231** | **133** | **364** | **35.3%** | **0.80%** |

[1] Includes all customers who failed SCE's FERA eligibility probability model.
[2] Includes customers verified as over income or who requested to be de-enrolled.
[3] Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request. Results may be pending due to the time permitted for a participant to respond.
[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.

| FERA Table 3B - Post-Enrollment Verification Results (Electric only High Usage) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Month** | **Total FERA Households Enrolled** | **Households Requested to Verify[1]** | **% of FERA Enrolled Requested to Verify Total** | **% of Scheduled Customers not Responsive to the PEV Process** | **% of Scheduled PEV Customers later verified as Income Eligible** | **FERA Households De-enrolled (Due to no response)** | **FERA Households De-enrolled (Verified as Ineligible)[2]** | **Total Households De-enrolled[3]** | **% De-enrolled through Post Enrollment Verification** | **% of Total FERA Households De-enrolled** |
| **January** | 32,176 | 7 | 0.0% | 100.0% | 0.0% | 7 | 0 | 7 | 100.0% | 0.0% |
| **February** | 31,985 | 2 | 0.0% | 50.0% | 50.0% | 1 | 0 | 1 | 50.0% | 0.0% |
| **March** | 31,677 | 2 | 0.0% | 0.0% | 100.0% | 0 | 1 | 1 | 50.0% | 0.0% |
| **April** | 31,770 | 13 | 0.0% | 92.3% | 7.7% | 12 | 1 | 13 | 100.0% | 0.0% |
| **May** | 31,416 | 11 | 0.0% | 81.8% | 18.2% | 9 | 1 | 10 | 90.9% | 0.0% |
| **June** | 32,377 | 12 | 0.0% | 16.7% | 83.3% | 2 | 2 | 4 | 33.3% | 0.0% |
| **July** | 33,565 | 12 | 0.0% | 16.7% | 83.3% | 2 | 2 | 4 | 33.3% | 0.0% |
| **August** | 35,304 | 14 | 0.0% | 78.6% | 21.4% | 11 | 0 | 11 | 78.6% | 0.0% |
| **September** | 39,846 | 22 | 0.1% | 86.4% | 13.6% | 19 | 0 | 19 | 86.4% | 0.0% |
| **October** | 41,836 | 37 | 0.1% | 81.1% | 18.9% | 30 | 1 | 31 | 83.8% | 0.1% |
| **November** | 43,731 | 41 | 0.1% | 75.6% | 24.4% | 31 | 5 | 36 | 87.8% | 0.1% |
| **December** | 45,641 | 21 | 0.0% | 4.8% | 95.2% | 1 | 2 | 3 | 14.3% | 0.0% |
| **YTD Total** | **45,641** | **194** | **0.4%** | **64.4%** | **35.6%** | **125** | **15** | **140** | **72.2%** | **0.3%** |

[1] Includes all participants who were selected for high usage verification process.
[2] Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.
[3] Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.

| FERA Table 3C Post-Enrollment Verification Re-Enrollment Rates (Model) 2025 | | | | | |
|---|---|---|---|---|---|
| **Month Removed [1]** | **Total Customers Removed** | **Re-Enrolled by 6 Months** | **6 Month Re-Enrollment Rate** | **Re-Enrolled by 12 Months [2]** | **12 Month Re-Enrollment Rate** |
| **January 2024** | 30 | 4 | 13% | 4 | 13% |
| **February 2024** | 0 | 0 | 0% | 0 | 0% |
| **March 2024** | 40 | 0 | 0% | 0 | 0% |
| **April 2024** | 1 | 0 | 0% | 0 | 0% |
| **May 2024** | 0 | 0 | 0% | 0 | 0% |
| **June 2024** | 77 | 10 | 13% | 15 | 19% |
| **July 2024** | 0 | 0 | 0% | 0 | 0% |
| **August 2024** | 0 | 0 | 0% | 0 | 0% |
| **September 2024** | 0 | 0 | 0% | 0 | 0% |
| **October 2024** | 163 | 59 | 36% | 66 | 40% |
| **November 2024** | 0 | 0 | 0% | 0 | 0% |
| **December 2024** | 0 | 0 | 0% | 0 | 0% |
| **YTD Total** | **311** | **73** | **23%** | **85** | **27%** |

[1] Reflects customers removed in the previous year to allow for the 12 month re-enrollment period
[2] Includes customers re-enrolled by 6 months. Counts may include customers de-enrolled again being initially re-enrolled.

| FERA Table 3D Post-Enrollment Verification Re-Enrollment Rates (High Usage) 2025 | | | | | |
|---|---|---|---|---|---|
| **Month** | **Total Customers** | **Re-Enrolled** | **6 Month Re-** | **Re-Enrolled by** | **12 Month Re-** |

| Removed [1] | Removed | by 6 Months | Enrollment Rate | 12 Months [2] | Enrollment Rate |
|---|---|---|---|---|---|
| **January 2024** | 2 | 1 | 50% | 1 | 50% |
| **February 2024** | 1 | 1 | 100% | 1 | 100% |
| **March 2024** | 3 | 3 | 100% | 3 | 100% |
| **April 2024** | 2 | 2 | 100% | 2 | 100% |
| **May 2024** | 0 | 0 | 0% | 0 | 0% |
| **June 2024** | 1 | 1 | 100% | 1 | 100% |
| **July 2024** | 0 | 0 | 0% | 0 | 0% |
| **August 2024** | 0 | 0 | 0% | 0 | 0% |
| **September 2024** | 0 | 0 | 0% | 0 | 0% |
| **October 2024** | 27 | 5 | 19% | 8 | 30% |
| **November 2024** | 3 | 1 | 33% | 1 | 33% |
| **December 2024** | 0 | 0 | 0% | 0 | 0% |
| **YTD Total** | **39** | **14** | **36%** | **17** | **44%** |

[1] Reflects customers removed in the previous year to allow for the 12 month re-enrollment period
[2] Includes customers re-enrolled by 6 months. Counts may include customers de-enrolled again being initially re-enrolled.

**FERA Table 4 - FERA Self-Certifications, Self-Recertification Applications and Post-Enrollment Verificiations**
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| FERA Table 4A | | | | | | |
|---|---|---|---|---|---|---|
| **FERA Self-Certification and Self-Recertification Applications[1]** | | | | | | |
| | **Provided** | **Received** | **Approved** | **Denied** | **Pending/Never Completed** | **Duplicates** |
| Total | 30,992 | 30,992 | 28,021 | 2,690 | 281 | 0 |
| Percentage | | 100% | 90% | 9% | 1% | 0% |

| FERA Table 4B | | | | | | |
|---|---|---|---|---|---|---|
| **FERA Post-Enrollment Verification[1]** | | | | | | |
| | **Requested** | **Received** | **Approved** | **Denied** | **Pending/Never Completed** | **Duplicates** |
| Total | 1,225 | 776 | 263 | 504 | 9 | 0 |
| | | | | | | |

**FERA Table 5 - FERA Enrollment by County**
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| County | Estimated Eligible Households[1] | | | Total Participants[2] | | | Enrollment Rate | | |
|---|---|---|---|---|---|---|---|---|---|
| | Urban | Rural | Total | Urban | Rural | Total | Urban | Rural | Total |
| Fresno | 186 | 0 | 186 | 1 | 0 | 1 | 1% | 0% | 1% |
| Imperial | 0 | 0 | 0 | 0 | 0 | 0 | 0% | 0% | 0% |
| Inyo | 3 | 491 | 494 | 0 | 32 | 32 | 0% | 7% | 6% |
| Kern | 3,087 | 3,969 | 7,056 | 357 | 327 | 684 | 12% | 8% | 10% |
| Kings | 0 | 2,549 | 2,549 | 1 | 308 | 309 | 0% | 12% | 12% |
| Los Angeles | 138,791 | 887 | 139,678 | 18,363 | 138 | 18,501 | 13% | 16% | 13% |
| Madera | 0 | 0 | 0 | 0 | 0 | 0 | 0% | 0% | 0% |
| Mariposa | 0 | 0 | 0 | 0 | 0 | 0 | 0% | 0% | 0% |
| Mono | 0 | 841 | 841 | 0 | 45 | 45 | 0% | 5% | 5% |
| Orange | 53,476 | 0 | 53,476 | 6,832 | 0 | 6,832 | 13% | 0% | 13% |
| Riverside | 26,197 | 26,267 | 52,464 | 3,428 | 4,192 | 7,620 | 13% | 16% | 15% |
| San Bernardino | 50,948 | 11,245 | 62,193 | 6,567 | 1,099 | 7,666 | 13% | 10% | 12% |
| San Diego | 0 | 0 | 0 | 0 | 0 | 0 | 0% | 0% | 0% |
| Santa Barbara | 4,846 | 0 | 4,846 | 296 | 0 | 296 | 6% | 0% | 6% |
| Tulare | 3,286 | 10,365 | 13,651 | 381 | 1,122 | 1,503 | 12% | 11% | 11% |
| Ventura | 18,991 | 807 | 19,798 | 2,064 | 88 | 2,152 | 11% | 11% | 11% |
| **Total** | **299,811** | **57,421** | **357,232** | **38,290** | **7,351** | **45,641** | **13%** | **13%** | **13%** |

[1] Based on the Annual Estimates of CARE and FERA Eligible Customers and Related Information filed on April 15, 2025.

[2] Total Households Enrolled includes submeter tenants.

**FERA Table 6 - FERA Recertification Results**
**Southern California Edison**
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| | Total FERA Households | Households Requested to Recertify [1] | % of Households Total (C/B) | Households Recertified [2, 5] | Households De-enrolled [3] | Recertification Rate % [4] (E/C) | % of Total Households De enrolled (F/B) |
|---|---|---|---|---|---|---|---|
| January | 32,176 | 967 | 3.0% | 89 | 342 | 9.2% | 1.06% |
| February | 31,985 | 635 | 2.0% | 95 | 587 | 15.0% | 1.84% |
| March | 31,677 | 1,610 | 5.1% | 118 | 319 | 7.3% | 1.01% |
| April | 31,770 | 1,167 | 3.7% | 121 | 288 | 10.4% | 0.91% |
| May | 31,416 | 1,099 | 3.5% | 93 | 296 | 8.5% | 0.94% |
| June | 32,377 | 1,476 | 4.6% | 115 | 320 | 7.8% | 0.99% |
| July | 33,565 | 1,299 | 3.9% | 74 | 277 | 5.7% | 0.83% |
| August | 35,304 | 460 | 1.3% | 45 | 231 | 9.8% | 0.65% |
| September | 39,846 | 215 | 0.5% | 22 | 122 | 10.2% | 0.31% |
| October | 41,836 | 236 | 0.6% | 29 | 176 | 12.3% | 0.42% |
| November | 43,731 | 231 | 0.5% | 14 | 161 | 6.1% | 0.37% |
| December | 45,641 | 214 | 0.5% | 15 | 29 | 7.0% | 0.06% |
| **YTD** | **45,641** | **9,609** | **21.05%** | **830** | **3,148** | **8.6%** | **6.90%** |

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

[2] Recertification results are tied to the month initiated and the recertification process allows customers 90 days (3 or 4 bill cycles) to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.

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

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

**FERA Table 7 - FERA Capitation Contractors**
**Southern California Edison**
**Program Year 2025 Annual Report**

| Contractor Name [1] | Contractor Type (Check one or more if applicable) | | | | Enrollments[2] | | | Total Expenditures |
|---|---|---|---|---|---|---|---|---|
| | Private | CBO | WMDVBE | LIHEAP | Rural | Urban | Total | |
| 2-1-1 ORANGE COUNTY | | x | | | - | - | - | $ - |
| ALPHA ENTERPRISES | | x | | | - | - | - | $ - |
| APAC SERVICE CENTER | x | | | | - | - | - | $ - |
| ARMENIAN RELIEF SOCIETY | x | | | | - | - | - | $ - |
| ASIAN AMERICAN DRUG ABUSE PROG | x | | | | - | - | - | $ - |
| ASIAN AMERICAN RESOURCE CENTER | x | | x | | - | - | - | $ - |
| ASIAN YOUTH CENTER | x | | | | - | - | - | $ - |
| BEST PARTNERS | x | | | | - | - | - | $ - |
| BETHEL BAPTIST CHURCH | x | | | | - | - | - | $ - |
| BISHOP PAIUTE TRIBE | x | | | | - | - | - | $ - |
| C.O.R. COMM DEVELOPMENT CORP | x | | | | - | - | - | $ - |
| CAREGIVERS VOLUNTEERS ELDERLY | | x | | | - | - | - | $ - |
| CHINESE CHRISTIAN HERALD CRUS. | x | | | | - | - | - | $ - |
| CHINO NEIGHBORHOOD HOUSE | | x | | | - | - | - | $ - |
| CITIHOUSING REAL ESTATE SERVIC | | x | | | - | - | - | $ - |
| CITY IMPACT | x | | | | - | - | - | $ - |
| CITY OF BEAUMONT SENIOR CENTER | | x | x | | - | - | - | $ - |
| COMMUNITY HEALTH INITIATIVE of OC | | x | | | - | - | - | $ - |
| DELHI CENTER | x | | | | - | - | - | $ - |
| DESERT COMMUNITY ENERGY | | x | | | - | - | - | $ - |
| DESERT MANNA MINISTRIES INC | x | | | | - | - | - | $ - |
| DISABLED RESOURCES CTR, INC | | x | x | | - | - | - | $ - |
| EL CONCILIO DEL CONDADO DE | x | | x | | - | - | - | $ - |
| FAMILY SVC ASSOC OF REDLANDS | x | | | | - | - | - | $ - |
| FOOD SHARE | x | | | | - | - | - | $ - |
| GO THE CALENDAR | | x | | | - | - | - | $ - |
| GRID ALTERNATIVES INLAND EMPIRE INC | | | x | | 1 | - | 1 | $ 30 |
| HELP OF OJAI, INC. | x | | | | - | - | - | $ - |
| HOUSING AUTHORITY OF KINGS CO | x | | x | | - | - | - | $ - |
| INLAND SOCAL 211+ | x | x | | | - | 1 | 1 | $ 30 |
| KERNVILLE UNION SCHOOL DISTRIC | x | | | | - | - | - | $ - |
| KINGS COMMUNTITY ACTION ORG | x | | | | - | - | - | $ - |
| KINGS CTY COMMISSION ON AGING | x | | | | - | - | - | $ - |
| LA COUNTY HOUSING AUTHORITY | | x | | | - | - | - | $ - |
| LEAGUE OF CALIF HOMEOWNERS | x | | | | - | - | - | $ - |
| LIFT TO RISE | x | | | | - | - | - | $ - |
| LTSC COMM. DEVEL. CORP | x | | | | - | - | - | $ - |
| MENIFEE VALLEY CHAMBER OF COMMERCE | | x | | | - | - | - | $ - |
| MEXICAN AMERICAN OPPORTUNITY | | x | x | | - | - | - | $ - |
| MTN COMM FAM RESOURCE CNTR | x | | | | - | - | - | $ - |
| NEW GREATER CIR. MISSION, INC | x | | | | - | - | - | $ - |
| NEW HOPE VILLAGE, INC | x | | | | - | - | - | $ - |
| NEW HORIZONS CAREGIVERS GROUP | | x | | | - | - | - | $ - |
| OCCC | x | | | | - | - | - | $ - |
| OPERATION GRACE | x | | | | - | - | - | $ - |
| OUR COMMUNITY WORKS | x | | | | - | - | - | $ - |
| PACIFIC ISLANDER HLTH (PIHP) | x | | | | - | - | - | $ - |
| PACIFIC PRIDE FOUNDATION | x | | | | - | - | - | $ - |
| PRM CONSULTING, INC. | x | x | x | | - | - | - | $ - |
| RIVERSIDE DEPT COMM ACTION | | x | x | x | - | - | - | $ - |
| SALVATION ARMY SANTA FE SPGS | x | | | | - | - | - | $ - |
| SALVATION ARMY VISALIA CORPS | x | | | | - | - | - | $ - |
| SANTA ANITA FAMILY SERVICE | x | | | | - | - | - | $ - |
| SENIOR ADVOCATES OF THE DESERT | x | | | | - | - | - | $ - |
| SHARE OUR SELVES | x | | | | - | - | - | $ - |
| SHIELDS FOR FAMILIES | x | x | | | - | - | - | $ - |
| SMILES FOR SENIORS FOUND. | x | | | | - | - | - | $ - |
| SOUTHEAST CITIES SERVICE CTR. | | x | | | - | - | - | $ - |
| SOUTHEAST COMMUNITY DEVELOPMEN | x | | | | - | - | - | $ - |
| ST VINCENT DE PAUL | | x | | | - | - | - | $ - |
| THE CAMBODIAN FAMILY | x | | | | - | - | - | $ - |
| UNITED CAMBODIAN COMMUNITY INC | | x | | | - | - | - | $ - |
| VICTOR VALLEY COMM SVC COUNCIL | x | | | | - | - | - | $ - |
| VIETNAMESE COMMUNITY OF OC INC | x | | | | - | - | - | $ - |
| VOLUTNEERS OF EAST LOS ANGELES | x | | x | | - | - | - | $ - |
| XFINITI SOLUTIONS, LLC | | x | | | - | - | - | $ - |
| **Total Enrollments and Expenditures** | | | | | **1** | **1** | **2** | **$ 60** |

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

[2] Enrollments reflect new enrollments only.

**FERA Table 8 - FERA Average Monthly Usage and Bill**
**Southern California Edison**
**Program Year 2025 Annual Report**

| Average Monthly Electric Usage | | | |
|---|---|---|---|
| Residential Non-FERA vs. FERA Customers | | | |
| Customer | Electric KWh Tier 1 | Electric KWh Tier 2 and Above | Total |
| Non-FERA | 317 | 143 | 460 |
| FERA | 369 | 230 | 598 |

| Average Monthly Electric Bill | | |
|---|---|---|
| Residential Non-FERA vs. FERA Customers[1] | | |
| (Dollars per Customer) | | |
| Customer | Electric | |
| Non-FERA | $125.14 | |
| FERA | $136.82 | |

[1] Excludes master-meter usage.

**Appendix B**

**2024 ESA/CARE/FERA Annual Report Presentation**

# 2024 CARE/FERA/ESA PROGRAM ANNUAL REPORT

PG&E – SCE (90 min)

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**Overview**

In today's Annual Report presentation, the IOUs will highlight key outcomes and takeaways from PY 2024, including lessons learned, and how those lessons learned are informing current year activities. Questions and discussion from participants are welcome and encouraged.

**Desired Outcomes**

- Broad stakeholder engagement into program learnings and planning
- Highlights of program successes, and challenges, and help to inform framework for the next program cycle
- Robust opportunity for dialogue and thought partnership among IOU and non-IOU participants

# CARE Program



## PG&E CARE Program – 2024 Highlights

### Program Outcomes

**Enrollment Rate:** 95% (vs 93% goal)

**# of Customers Enrolled:**
- 1.4M total
- > 296k new enrollments

**Average Monthly Bill Discount:**
- Electric $64.39
- Gas $13.38

### Program Costs

**Discounts:**
- 2024 Discount Actual: $1,105,773,253
- D.21-06-015 Amount: $696,394,000
- % Budget Spent: 159%

### Noteworthy Activities/Outcomes

**Auto-Enrollments from Other Assistance Programs**

- In 2024, 8% of new enrollments were from auto-enrollments from other programs: PG&E leverages information from data sharing with other programs that verify customer's income.

| 2024 CARE Auto-Enrollments | |
|---|---|
| DAC-SASH | 64 |
| REACH | 8,935 |
| LIHEAP | 4,734 |
| ESA | 9,436 |

**Retooling PEV Communication to Improve Customer Experience and Retention**
- Improved the look-and-feel and messaging of forms based on prior customer feedback encouraged customers to respond
- Enhanced email system capacity to enable email communication with customers at different touchpoints (e.g., confirming document submission upon upload)
- Improved back-end PEV processes such as increasing the upload size for customers' files

**Net Results:**
- An increase in PEV online documents submitted (44% in 2023; 60% in 2024)
- A reduction of incomplete PEV (7.9% in 2023; 6.1% in 2024)
- A decrease of approximately 11K CARE/FERA-related calls

## Lessons Learned from 2024 Applicable to 2025

- Continue (and explore expanding where possible) auto-enrollments from other programs that verify customers' income to support customers
- Continue to reduce attribution through improving PEV process/experience for customer
  - Develop/Release a PEV how-to video and visual guides to support customers through the PEV process
  - Continue outbound calls for customers who submitted incomplete PEVs as this is a strategy that has proven successful with this segment of customers
- Expand CARE to include Homekey properties

## SCE CARE Program | 2024 Highlights

### Program Performance

**Number of Customers Enrolled**
- 1,353,981 customers (104% Penetration)
- 64K new enrollments

**Average Monthly Discount**
- Gas $ 18[1]
- Electric $ 53

[1] Applies only to Catalina Residents

### Program Cost

**Budget**
- Authorized Administrative Budget: $9M
- % Admin Budget Spent: 86%

**Subsidies**
- 2024 Forecasted Subsidies $415M
- Annual subsidy of $855M
- % of Subsidy Spent 206%

### Noteworthy Activities

**Enhanced Marketing & Outreach**

**Co-Marketing Partnerships:** Launched co-marketing partnerships with AFN, PSPS, E-Mobility, and Residential Energy Efficiency programs to enhance outreach efforts. Developed Social Media Toolkits for Community-Based Organizations (CBOs) to improve outreach to hard-to-reach communities.
**InterAgency Partnerships:** Enhanced collaborations with state and federal agencies, including State In-Home Support Services. Partnered with school districts to use Parent Square for sharing information about our income-qualified programs, with over 400 schools participating. Additionally, signed up three tribes for our Mini Tribal Grant Program.

**Process Improvements**

**Deployed Genesys Outbound Reminder Calls:** Implemented outbound calls to reduce non-response rates for CARE/FERA verifications and recertifications.
**Increased Self-Serve Options:** Improved IVR and SCE.com channels, leading to a 40% rise in self-serve enrollments.
**Initiated Post Enrollment Verification Exemptions:** Minimized income verification redundancies for ESA enrolled customers, with plans to extend this to other equity programs.

**Energy Management**

**Launched disaggregation reports:** Customers received reports illustrating household usage by end use over time. These reports are accessible to ESA program contractors and customers via My Account.

**Expanded Data Sharing Opportunities**

**Refreshed agreements and processes for data sharing:** Facilitated and confirmed data exchange with various water agencies and other utilities. Initiated new data sharing with non-regulated water agencies and established new parameters to start a streamlined data sharing process.

## SCE CARE Program | Lessons Learned

**Focus on Self-Serve Options**
SCE has successfully enhanced self-serve options, significantly increased enrollments and demonstrating that low-income customers are now comfortable using IVR and online channels. SCE will continue to promote these alternative channels for new enrollments, recertifications, and verifications, thereby improving customer experience and creating time and resource efficiencies.

**Limitations in Issuing Verifications and Recertifications**
SCE faces ongoing challenges in implementing verification and recertification processes due to Emergency Protection Orders (EPO) impacting numerous zip codes within its service territory. These EPOs require IOUs to suspend verification and recertificati on for affected customers, hindering our ability to filter out ineligible participants. SCE is exploring ways to expand future income verification activities within the new program cycle application.

**Opportunity to Reduce Redundancies in Income Verifications**
SCE has identified opportunities to streamline income verification processes across programs, enhancing efficiency and improving customer experience. By reducing redundancies, we can save time, increase participation, optimize resource use, and ensure consistent data integrity.

**Enhancing Customer Understanding Using Interactive AI-Powered Training Videos**
SCE plans to explore using AI technology to create interactive training and videos for internal processors and customers, enhancing their understanding of various CARE program processes.



# CARE PROGRAM QUESTIONS & DISCUSSION

# FERA Program

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## PG&E FERA Program – 2024 Highlights

### Program Outcomes

**Enrollment Rate:** 25% (vs 60% goal)

**# of Customers Enrolled:**

- 39,262 total
- 13,289 new enrollments

**Average Monthly Bill Discount:**

- Electric $45.81

### Program Costs

**Discount:**

- 2024 Discount Spent: $18,273,000
- D.21-06-015 Amount: $21,280,262
- % Budget Spent: 116%

**ME&O Expenditure:**

- 2024 Spent: $1,964,527

### Noteworthy Activities/Outcomes

In addition to improving customer experience and retention through enhanced PEV communication/process, PG&E also implemented the following to increase customer participation in FERA:

**Continued Key Outreach Strategies to Broaden FERA Awareness**

- Continued execution of data-driven marketing and multi-touch outreach approaches, utilizing data and research to customize campaigns for specific targeted zip codes
- Orchestrated multiple enrollment and retention outreach campaigns including the Welcome campaign, Never Targeted campaign, and Recertification Reminder campaign, Digital campaign, etc.
- Utilized multicultural media channels to amplify the FERA program message to a diverse audience

**Innovative Approaches and Continued Community-Based Organization (CBO) Partnership to Improve Enrollment Outcome**

- Launched a new social media influencer marketing campaign
- Launched new CBO initiative designed to increase customers' program awareness
- Continued with the FERA Barriers Study

## Lessons Learned from 2024 Applicable to 2025

- **The 2025 marketing plan builds on previous successes and lessons learned to continue testing new tactics and partners to enhance the FERA marketing mix**
  - Continue to leverage insights from the Hard-to-Reach customer profiles to improve targeting, testing and creative development
  - ZIP code level media targeting will be expanded and spend weighting increased
  - Social media Influencer Marketing campaign will be expanded in 2025
- **Development of new tools to help customers complete re-enrollment and post-enrollment verification**
  - Further testing of recertification reminder emails to increase engagement and drive higher recertification rates
  - Develop/Release a PEV how-to video and visual guides to support customers through the PEV process
- **Integration of SB 1130 and the Base Services Charge:**
  - Update program forms/applications and outreach materials/campaigns to target newly eligible households
  - Work will begin in late 2025 to integrate Base Services Charge messages in FERA acquisition and retention materials
- **FERA Barriers Study Recommendations**
  Review study for recommendations actionable in 2025, and what can be included in the next IQP Application

## SCE FERAProgram | 2024 Highlights

### Program Performance

**Number of Customers Enrolled**
- 32,793 customers (15% Penetration)
- 2K new enrollments

**Average Monthly Discount**
- Electric $ 33

### Program Cost

**Budget**
- Authorized Administrative Budget: $1.5M
- % Admin Budget Spent: 41%

**Subsidies**
- 2024 Forecasted Subsidies $46M
- Annual subsidy of $15M
- % of Subsidy Spent 32%

### Noteworthy Activities

**Enhanced Marketing & Outreach**

**Direct Communication Channels:** In 2024, SCE sent one million emails, achieving a 55% open rate and a 5.3% Click to Open Rate. The Q4 campaign tested new messaging, with a 43% open rate and a 6.8% Click to Open Rate. This demonstrates SCE's dedication to continuously enhancing its communication strategies to encourage more customers to enroll in and benefit from the FERA program.

**Digital Media:** FERA's top marketing tool is social media, accounting for 86% of its budget, with over 20 million impressions and 104,000 clicks. Banner ads, paid search, radio, and digital audio also contributed significantly, with Facebook being the best-performing platform. SCE.com saw over one million visits to the CARE/FERA page, with high engagement and application rates.

**Refreshed Targeting Strategies:** In Q4, SCE developed a new propensity model for FERA, leveraging data from various sources as it continuously improves targeting accuracy.

**Inter-Agency Partnerships:** Enhanced collaborations with state and federal agencies, including State In-Home Support Services. Partnered with over 400 schools via Parent Square, and signed up three tribes for the Mini Tribal Grant Program.

**Community Engagement**

**Focus on Hard to Reach:** SCE focuses on outreach and communication for FERA programs, especially in underserved and linguistically diverse communities. By collaborating across internal departments and partnering with external organizations, SCE has participated in over 206 community engagement activities, reaching approximately 40,000 customers, with 56.6% of events targeting disadvantaged communities.

**Process Improvements**

**Deployed Genesys Outbound Reminder Calls:** Implemented outbound calls to reduce non-response rates for CARE/FERA verifications and recertifications.

## SCE FERA Program | Lessons Learned

### FERA Enrollment Challenges

Several factors continue to contribute to the challenges in increasing FERA program participation:

- Combined Enrollment Forms: Using a single form for both CARE and FERA often leads FERA-eligible individuals to opt for the higher CARE discount.
- Income Misreporting: Some customers may intentionally misreport their income to qualify for the 32.5% CARE discount instead of the 18% FERA discount.

### FERA Nurture Pilot

In D.21-06-015, the Commission approved SCE's telemarketing pilot to reach out to customers who received direct mail but did not enroll. In 2024, 3,105 calls were made, resulting in 4 FERA and 11 CARE enrollments, with 560 calls unsuccessful due to incorrect or disconnected numbers. In 2025, SCE plans to reinstate the pilot, focusing on customers who did not qualify because of household size prior to implementation of SB1130. Additionally, improving contact information to boost call conversion rates.

### Continue Enhancing Multi-Channel Marketing and Outreach Strategy

Implement and test the enhanced multi-channel marketing and outreach strategies to improve participation numbers for the FERA program. This involves leveraging various communication platforms such as social media, email campaigns, community events, and partnerships with local organizations to reach a broader audience. By analyzing the effectiveness of these channels and continuously refining our approach, we aim to increase awareness and engagement, ultimately boosting program participation rates.



## SCE FERA Program | Lessons Learned

### SCE's Multi-Channel Marketing Strategy

SCE uses a multi-channel approach to reach potential FERA customers, including email, direct mail, digital platforms, social media, search, and radio. This strategy boosts awareness, consideration, and enrollment while reducing costs. Although conversion rates are tracked, pinpointing which efforts lead to enrollments is challenging due to multiple touchpoints needed before customers enroll. This comprehensive approach ensures broad outreach and maximizes marketing impact.

### SB1130 Expansion Initiatives

- Separate information flyers for CARE and FERA will continue to be used for all marketing and outreach activities, except for the Annual Solicitation, which will feature a joint CARE/FERA trifold to be included or linked in customer billing statements.
- A special communication targeting 1-2 person households previously ineligible for CARE but not qualifying for FERA due to household size restrictions will be issued, advising them of new eligibility rules.
- SCE will also leverage its existing FERA Nurture pilot to make outbound calls encouraging newly eligible individuals to participate and enroll.
- Reprocessing of our ESA to FERA enrollments to enroll those previously denied

### FERA Propensity Model Updates

SCE plans to revise the FERA propensity targeting model to incorporate the removal of household size limitations. This update will ensure the model accurately reflects the new eligibility criteria and improves the efficiency of targeting high-potential audiences.

### CARE to FERA Transition

Back-end systems are configured to automatically enroll customers into FERA if they do not meet CARE requirements during enrollments, recertifications, and verification transactions. Verification processes ensure that customers are correctly enrolled in the appropriate program.

Joint Utility | Public Meeting – 2024 IQP Programs Highlights & Accomplishments

Energy for What's Ahead®

# FERA PROGRAM
# QUESTIONS & DISCUSSION

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# ESA Main Program

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# ESA Main – 2024 Highlights

## Program Outcomes

**Energy Savings**
- 11,364 kW (386% Goal)
- 29,479,564 KWh (86% Goal)
- 1,359,246 Therms (98% Goal)

**Homes Treated**
- 50,797 (93% Goal)

**Average 1st Year Bill Savings**
- ~$176

## Program Costs

**Expenditure**
- 2024 Actual: $112,518,356
- Authorized Amount: $120,139,102
- % Budget Spent: 94%

**Avg. Measure Costs Per Home:** ~$1,914

## Noteworthy Activities/Outcomes

**Marketing, Education & Outreach**
- Continued data-driven targeting and segmentation to identify key markets, highest needs states, and households with higher energy savings potential. Utilizing proven customer targeting methods, PG&E's ME&O initiatives generated more program applications for ESA contractors, exceeding the internal application goal.

**Sustained Focus on Customer Satisfaction**
- PG&E transitioned its ESA Customer Satisfaction Survey to a new platform to enable a more timely and user-friendly interaction with ESA customers upon completion of treatment. As a result, PG&E saw a seven percent increase in survey response. The overall customer satisfaction increased by two percent, to an overall score of 86%, compared to the prior year.

**Continuing Leveraging Partnerships and ESA Measure Modification Process to Maximize Benefits Customers**
- 28% of heat pump water heaters upgrades were made possible due to remediation costs being covered by the TECH Clean CA Program
- In 2024, PG&E further adopted two new measures with high savings potential--Smart Fan Controller (SFC) and Lifecycle Refrigerant Management (LRM)—in its ESA measures offering through the ESA Measure Modification process.

# Lessons Learned from 2024 Applicable to 2025

**Lesson Learned: Data Driven Program Management**
- ESA Main's Marketing, Education, and Outreach (ME&O) initiatives utilized proven customer targeting methods and generated more program applications for ESA contractors, exceeding the internal application goal
- Continue data-driven targeting and segmentation to identify key markets, highest needs states, and households with higher energy savings potential

**Leason Learned: Measure Mix Optimization; Improved Cost-Effectiveness**
- The introduction of the ESA measure modification process has provided an efficient process to introduce new measures to increase energy savings potential for ESA customers
- Continue to utilize the protocol to fine tune ESA offerings to achieving deeper energy savings per home

**Strategy Adjustments for 2025**

**Shift**: Move from general outreach to targeted, high-savings ME&O strategies
**Drop:** Long-duration campaigns; focus on Q1/Q2 pipeline frontloading
**Refine:** Seek opportunity to optimize measure mix via the ESA measure modification process

## SCE ESAProgram | 2024 Highlights

### Program Performance

- Homes Treated was 73% of goal/target:
  - 64,922 goal/target
  - 47,587 actual
- ESA Savings was 18.33M kWh
- Spent 90% of Authorized Budget:
  - $59,458,992 authorized
  - $53,451,456 actual
- Committed remaining 10% of the Authorized Budget equivalent to $6M
- Average First Year Bill Savings was $88

### Implementation for 2024

- Continued program design focused on deeper energy savings
- Expanded eligibility by adjusting usage thresholds and increasing measure availability across customer segments
- Introduced advance payment options for ESA contractors to support financial stability and enable ramp-up of service delivery
- Completed migration to the new system, iEnergy.

### Noteworthy Activities

#### Mitigatiorto Momentum

- Treated 47,587 homes in 2024—more than triple the 2023 total
- Achieved 73% of the annual homes treated target, up from 35% in 2023
- Delivered 18.3 GWh in energy savings, a 3x increase over 2023
- Spent 90% of unspent and uncommitted funds, demonstrating strong fiscal execution

#### Contractor and System Support

- Launched $9M in advance payments to support contractor ramp-up and cash flow
- Transitioned from EMAPS to iEnergy to modernize program operations
- Held cadenced partner forums and office hours to improve contractor engagement and training

#### Pilots Driving Deeper Savings

- ESA Building Electrification pilot treated 116 homes in 2024, up from 4 in 2023
- Enhanced measure mix and eligibility thresholds to broaden access to high-impact technologies

#### Precision Outreach

- Over 50,000 leads generated by contractors and 18,000 from SCE marketing
- Delivered 24M+ social media impressions and 579K ESA webpage visits
- Used predictive analytics to prioritize high-usage, high-need households
- Partnered with community-based organizations and tribal leaders to expand reach



## SCE ESAProgram | Lessons Learned

| 2024 Lessons Learned | 2025 Informed Strategy |
|---|---|
| ○ SUSTAIN:<br>• Advance payments to contractors continues to stabilize program delivery.<br>• Lowering high-usage thresholds expands program access.<br>• Collaborative contractor engagement enhances responsiveness and agility.<br>• Workforce development supports long-term program resilience. | **SUSTAIN** strategies that promote financial stability, broaden program accessibility, enhance operational agility, and build long-term workforce capacity. |
| ○ IMROVE:<br>• System transitions require robust contingency planning.<br>• Targeted marketing and analytics improve outreach efficiency.<br>• Continuous improvement in savings calculation methodologies is essential.<br>• Cross-program integration enhances customer experience. | **IMPROVE** strategies by increasing contingency planning, refining outreach analytics, enhancing savings methodologies, and deepening program integration. |

# ESA MAIN PROGRAM QUESTIONS & DISCUSSION

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# ESA PG&E MFWB Program

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# N. MFWB Program – 2024 Highlights

## Program Outcomes

**Energy Savings**
- 1,107 kW
- 4,591,624 kWh
- 200,719 Therms

**Homes Treated**
- 17,771 in-units
- 25 Whole Building (WB)

**Average 1st Bill Savings**
- ~ $69 (in-unit)
- ~ $410 (WB)

## Program Costs

**Expenditure**
- 2024 Actual: $22,151,948
- Authorized Amount: $70,332,846
- % Budget Spent: 31%

**Avg Treatment Costs per home or building:**
- ~ $822 per in-unit
- ~ $32,266 per WB

## Noteworthy Activities/Outcomes

- During the year, the N.MFWB program continued its ramp-up efforts through proactively collaborating with external program partners, such as the California Department of Community Services and Development (CSD)'s Low-Income Weatherization Program (LIWP), TECH Clean California and the Solar on Multifamily Affordable Housing (SOMAH) program, to identify leveraging opportunities that streamlined cross-program referrals and reduced measure costs for N. MFWB program participants, thereby making the program more attractive to property owners. Additionally, the program actively engaged in reaching affordable housing communities and building the N. MFWB program pipeline through various outreach efforts.
- The program also completed its first whole building electrification project (common area high efficiency heat pump HVAC system).

# Lessons Learned from 2024 Applicable to 2025

**Establish performance metrics base on realistic expectations for whole builidng projects**
- Whole building projects have longer project timeline due to administrative complexity such as coordination with property owners on decisions, schedule on-site work, permitting process, etc.
- The market for whole building projects appears to be saturated with competing programs
- Many propertie already received treatment within 12 the past twelve months, which limited the number of measures received

**Property level enrollment is time-consuming as the program needs to review rent and other income document to confirm the income eligibility**
- Explore opportunities for streamlining, partnering with other programs verifying income at the property level, etc. to reduce administrative time and cost.

# ESA MULTIFAMILY QUESTIONS & DISCUSSION

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# ESA Whole Home Pilots (Plus/Deep) SCE's Electrification Pilots

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# PG&E ESA Pilot Plus/Pilot Deep (PP/PD) – 2024 Highlights

## Program Outcomes

**Energy Savings***
- kW: 120 (Plus), 159 (Deep)
- KWh: 84,709 (P), 132,197 (D)
- Therms: 8,865 (P), 17,978 (D)
- % savings: 10% (P), 26% (D), 18% (Combined)

**Homes Treated**
- 295 Homes

**Average Monthly Bill Savings***
- Plus: $22.01
- Deep: $39.10
- Combined: $30.59

## Program Costs

**Expenditure**
- 2024 Actual: $9,821,489
- Authorized Amount: $8,782,607
- % Budget Spent: 112%
- Roll-Over: $11,459,367 (2022-2023)

**Avg Treatment Costs per Home**
- ~$33,293

## Noteworthy Activities/Outcomes

- Pilot operations reached full capacity, following ramp-up from 2022-2023.
  - Over 600 advanced home energy assessments completed.
  - Over 400 installations initiated.
  - 295 fully completed projects by year's end.
- Pilot Evaluation Team selected and onboarded.
  - RFP Q2-Q3 2024.
  - Onboarding Q4 2024.
  - Early evaluation efforts kicked off by EOY 2024.
- Measure package diversification:
  - Cool roofs added to enable partnerships with solar providers.
  - Heat Pump Water Heater, Central HVAC Heat Pump measures installed at a significantly higher rate than 2023.

*Energy and bill savings are reported based on the best available information at the time of reporting. Pre- and post-installation savings are derived from energy modeling software. Meter-based savings estimates are not available until approximately 15 months after the installation end date.

# Lessons Learned from 2024 Applicable to 2025

**Pilot Evaluator began generating lessons learned in 2024:**

- Overall satisfaction remains high at 85%, with 81% likely to recommend the Pilot to family or friends
- Conversion rates and the time between steps have steadily improved over the course of the Pilot
- A significant portion of Pilot leads (30%) are disqualified due to income level after customers respond to marketing, meaning there is actionable feedback to improve targeting based on income level
- Gas measures are performing lower than expected at the meter, whereas electric measures are performing reasonably well

**2025**: Utilize evaluator to collect, analyze and generate findings for ESA Applications and ongoing Pilot operations, particularly regarding measure mixes and performance criteria.

## SCE/SoCalGas ESA Whole Home Program | 2024 Highlights

### Program Performance

| 26 Homes Treated | Pilot Plus | Pilot Deep | ESA Main (SCE) |
|---|---|---|---|
| Projected Savings | 11,641 kWh | 26,708 kWh | 18,333,809 kWh |
| | 481 therms | 2,086 therms | 55.533 therms |
| Avg. Savings Per Home | 970 kWh | 1,908 kWh | 385 kWh |
| | 40 therms | 149 therms | 1.2 therms |
| Avg. Cost per Home | $11,380 | $16,547 | $ 858 |

### Program Costs

2024 Authorized: $ 10,395,409
2024 Actual: $ 1,631,552 16%

### Pipeline Status

In Progress: 3
Pending Approval: 341
Enrolled/Installed: 116
Completed: 28 (1% of overall pilot target)
De-Enrolled: 117

### Noteworthy Activities

**Outreach Activities**
Adjustments to marketing collateral, launched email outreach campaigns, modifications to customer segmentation approach and increased frequency of customer target list. Since inception, 605 customers expressed interest.

**Evaluation**
Illume Advising has conducted several activities during 2024, including:
Bill analysis to understand progress towards program goals, conducted nonparticipant surveys, contractor interviews to assess process and recommend improvements.

**Implementation**
SCE has established an agreement with Maroma Energy Services to facilitate bulk purchases of equipment. SCE has also agreed and implemented revised payment terms to a Net 10. Maroma Energy Services launched an Energy Auditor model to allow contractors to focus solely on installations while another party will focus on performing the energy audits.

**Best Practices**
Bi-Weekly Meeting with the Evaluator, Implementer, and Inspections teams to keep everyone apprised on pilot updates.
Co-branded marketing materials to lend more credibility to implementer.
Digital customer marketing instead of all direct mailers.
Expansion of eligible population



## SCE/SoCalGas ESA Whole Home Program | Lessons Learned

- Cost Cap thresholds to include flexibility when it comes to new measure installation and the requirements needed to install the measures. For Example, solar water heater/ tankless water heater requires ½ inch piping and older homes typically don't have existing capacity for these pipes, additional remediation is required to install them.
- Implementing an invoicing structure to ease financial burden on contractors make for ease of program participation. Most Whole Home Program projects require a building permit; however, local Building Departments lack sufficient inspection capacity, leading to significant delays in project closeout and reporting.

## SCE ESA Building Electrification Program | 2024 Highlights

### Overview

SCE-only pilot targeting income-qualified customers in single-family homes, focusing on converting space and water heating systems from natural gas to electric heat pumps to reduce energy costs. A limited number of homes may also receive induction cooking and energy efficient clothes dryers.

### Budget / Savings

| | Authorized (2021-2026) | Actuals (2021-2024) | % Actuals |
|---|---|---|---|
| Budget | $40,832,693 | $3,676,415 | 9% |
| kWh Saved | (9,390,411) | (311,612) | 3% |
| kW Reduced | 1,298 | 0 | 0% |
| Therms Saved | 721,388 | 46,783 | 6% |
| Claimable Savings | 11,746,257 | 1,059,122 | 9% |

- Avg project Claimable savings: 8,826
- Avg project cost (*Fully burden*): $30,637

### Noteworthy Activities

#### Implementation

By the end of 2024, BE Program treated a total of 120 homes, with 116 being completed in 2024. The momentum significantly increased from the previous year and had about 395 homes still in progress.

#### Outreach & Marketing

- Multi-touch marketing campaigns, engaging over 28,000 customers, through emails, letters, postcards, and printed materials.
- Cross-promotion: Collaborated with Building Decarbonization Coalition to promote the BE program through the Switch-Is-On website.

#### Leveraging

- TECH Clean CA funds were exhausted by end of 2024, having been used for electrical upgrades (e.g., new circuit runs, main and sub panels), and minor home repairs (e.g., wall furnace removal and patch work). This allowed SCE to serve more customers without increasing BE budget.
- To enhance bill savings potential for participants, BE leveraged an internal process and updated customer profiles based on heat pumps installed under the program. This update enables eligible customers to receive baseline allowance allocations without needing to contact SCE's call center.



## SCE ESA Building Electrification Program | Lessons Learned

**Effective Targeting Strategies**

While the program primarily targets customers in disadvantaged communities (DACs), it is available to all income-qualified customers within the SCE service area.

- **Customer Targeting:** Residential energy meter data is analyzed to identify customers most likely to benefit from specific building electrification interventions based on their metered consumption characteristics, such as households with high cooling loads.
- **Utilization of Customer Insights:** Predictive models are employed to identify customers based on geographic and demographic profiles, including financial status, homeownership, and location.
- **Future Opportunities:** SCE will continue to explore additional opportunities, such as expanding the program to include mobile homes, also referred to as manufactured homes.

**Collaborative Efforts**

- Efforts to streamline the BE program continue, while identifying opportunities to add additional initiatives (e.g., measures) rather than establishing a new program or pilot could improve customer access to electrification and energy-efficient solutions and increase program participation.

**Program Management**

- SCE continued to work closely with the implementer to identify process improvements opportunities, including the introduction of the contractor advance payment initiative. This initiative aims to enhance cash flow of installation contractors by providing a milestone payment upon project approval and permit acquisition. By bolstering contractors' capacity to undertake and deliver more projects, this initiative is expected to accelerate project starts.

## SCE ESA Clean Energy Homes Program | 2024 Highlights

### Overview

SCE-only program targeting builders' low-income residential new construction outside of the BUILD Area. Program offerings include Technical design assistance, GHG driven financial incentives, tenant education & outreach to affordable housing developers. Program launched in Q2-2023.

### Budget

- 2022-2027 Pilot Budget: $8.5M
- Expenditures: $1.34M
- Percentage of Budget Spent: 15.65%

*ITD as of April 2025

### Noteworthy Activities

#### Implementation

- Initial recruitment through trade organization engagement, website development, and informational webinars.
- Strategic Plan revamped with targeted recruitment through collaboration with SCE account managers and engagement of BUILD participants for tenant education.

#### Evaluation

Shifted the evaluation plan to focus on a lessons learned report from the program lifecycle.

#### Outreach Activities

- SCE Account Managers (AM) engaged with Government and Institution representatives
- AM, will meet with city leaders monthly to provide program details and status.
- Hosted several program webinars

#### Best Practices

- Leverage programs such as BUILD for best practices and lessons learned.
- SCE and Implementer maintain a regular meeting cadence meeting, bi-weekly and ad-hoc as needed.
- Met with CEC for program eligibility expansion



## SCE ESA Clean Energy Homes Program | Lessons Learned

**CEH Program Update and Closure Plans**

- **Program Challenges & Barriers:**
  - Geographic Limitations: Limited to Long Beach, Catalina Island, and parts of Mono and Inyo counties.
  - Builder Preferences: Builders may prefer later stages of permitting, showing less interest in early design assistance.
  - Mismatched Market Conditions: Equity requirements conflict with current market conditions for new construction.
  - Local Equity Unit Discrepancies: Long Beach requires 12% Equity units, while the program demands 60%.
  - Lack of New Construction: Minimal new construction in Catalina and Mono and Inyo counties limits program participation.
- **Low Enrollment:** Only 8 applications received for incentives; program will close in 2025.
- **Engagement with the Energy Division:** Provided program status updates and SCE recommendations for program closure, which were agreed upon by ED.
- **Pending Incentives:** 1 Design Incentive, 4 Tenant Education Incentives. Completion of activities by August 2025
- **Marketing & Outreach:** Completed; CEH Program website has contact info but lacks enrollment links.
- **Ramp Down Plan:** Developed by SCE and the Implementer for 2025. Slated ramp down is for August 2025
- **Incentive Payments:** All incentives to be paid pending final eligibility. The Implementer has budgeted for ramp-down activities and final application reviews.
- **Budget Reallocation:** Remaining CEH budget to be transferred to ESA Programs.
- **Program Evaluation:** SCE initiated evaluation process and will compile a report on lessons learned.

# PILOT PROGRAMS
# QUESTIONS & DISCUSSION

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# 2024 ESA Unspent Funds

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## ESA Unspent Funds - PY2024

| Programs | 2024 Unspent Dollars($) | Funds Handling [1] [2] [3] [4] |
|---|---|---|
| ESA Main | SCE spent 90% ($53.5M) of authorized budget ($59.5M) in 2024. | SCE will use the balance of the PY2024 committed funds to complete projects in PY2025. |
| PPPD (SCE/SCG) | The Pilot spent 16% ($1.6M) of authorized funds ($10.4M) in 2024 | IOUs will carry over approximately (~$8.7M) 2024 authorized budget into PY2025 as allowed in D.21-06-015. |
| MFWB | N/A – Will be reported by SDG&E for the Southern MFWB Program | N/A |
| BE | The Pilot spent 29% ($3.0M) of authorized funds ($10.3M) in 2024. | SCE will carry over approximately 71% of 2024 authorized budget (~$7.2M) into PY2025 as allowed in D.21-06-015. |
| CEH | The Pilot spent 29% ($0.5M) of authorized funds ($1.8M) in 2024. | Carry over PY2024 unspent uncommitted funds into PY2025 as allowed in D.21-06-015. The balance of the funds are being used for close out activities in PY2025. |

[1] Committed Funds – Funds that are committed to a specific ESA Program contract or customer project.
[2] Unspent Funds – Authorized yet unspent and uncommitted to a specific ESA Program contract or customer project.
[3] Fund shifting – Moving funds withing a program budget category or program as allowed in D.21-06-015.
[4] Carryover – Moving unspent uncommitted funds to the next program year as allowed in D.21-06-015





## SCE UNSPENT FUNDS QUESTIONS & DISCUSSION

## ESA Unspent Funds - PY2024

| Programs | 2024 Unspent Dollars($) | Funds Handling [1] [2] [3] [4] |
|---|---|---|
| ESA Main | The Program expended more than 98% of its program budget. | The remaining funds were returned to ratepayers as directed in D.21-06-015. |
| PPPD | The Pilot spent 112% of authorized funds in 2024. | PG&E plans to use the $11.5M shifted from PY 2022-2023 to maintain operating the Pilot at the large scale in PY 2025-2026. |
| N.MFWB | The N.MFWB had $22M in unspent 2024 authorized budget. | Per D.21-06-016, unspent MFWB funds could be rolled over into future program years to support program operation. The combined roll-over amount from 2023-2024 to 2025 is $50.4M.<br><br>PG&E is actively monitoring program expenditure and seeking opportunities to utilize authorized funding as the program continues to ramp up. |





## PG&E UNSPENT FUNDS QUESTIONS & DISCUSSION