

# Lights for Learning CFL Fundraiser

<b>1. Projected Program Budget</b>	\$	<b>612,882</b>
<b>2. Projected Program Impacts</b>		
MWh		8,518
MW (Summer Peak)		0.81
<b>3. Program Cost Effectiveness</b>		
TRC		3.03
PAC		7.12

## 4. Program Descriptors

Market Sector:	Residential
Program Classification:	local
Program Status:	IDEEA

## 2. Program Statement

The Lights for Learning CFL Fundraiser captures electric savings and furthers customer awareness of CFLs using a unique sales channel. Working with schools, foundations and community youth organizations, participants sell ENERGY STAR P qualified CFLs to raise needed funds. Lights for Learning offers CFLs—which people can feel good about purchasing for their efficiency and moneysaving benefits—as an alternative to the items typically sold through fundraisers (such as magazines and gift wrap). The Lights for Learning Fundraiser specifically targets youth organizations which have the eager support of their communities, even as they face chronic funding needs.

## 6. Program Rationale

Because a wide variety of organizations can participate, Lights for Learning reaches a diverse group of residential SCE customers, providing them an opportunity to purchase and install CFLs in their homes. As a result, communities gain a deeper awareness of CFLs and their benefits.

## 7. Program Outcomes

The program measures success by achieving long-term energy savings through the replacement of incandescent bulbs with CFLs, educating the community on the benefits of CFLs and energy efficiency, as well as providing SCE with a positive energy savings program to offer to customers.

## 8. Program Strategy

When choosing a CFL manufacturer partner, PECEI will give preference to those with products that have undergone independent testing for quality. PECEI will negotiate a low wholesale price that, with a modest buy-down, allows for a retail-competitive price point. In some cases, a buy-down may not be necessary to attain a reasonable price while still providing the 50% profit margin that the fundraiser offers to all participating

organizations. Lights for Learning participants also have the opportunity to earn sales bonuses which are paid out upon reaching a customized sales goal. The bonus structure sets this goal according to the number of people selling, and encourages sales by providing extra incentives to participating organizations.

## **9. Program Objectives**

The proposed budget for the program is \$612,882. This includes \$86,606 for incentives. The budget will deliver 8,517,757 annual kWh.

## **10. Program Implementation**

### **TASK 1: Re-Assess Implementation Timeline, Marketing Plan and Staffing Rates or Unit Pricing with SCE for Inclusion in the Purchase Order**

Any negotiated changes to the program timeline, marketing plan or unit prices will be applied to the contract and implemented within 30 days.

### **TASK 2: Assemble and Submit SCE Approved Purchase Order Kit**

Upon award of the contract, PECI will create a purchase order kit including a program process flow diagram process flow narrative, scope of work document, program budget, contract type and E3 Calculator.

### **TASK 3: Build Tracking System**

PECI will develop a tracking system that accurately quantifies the results of the program and monitors progress toward overall program goals.

### **TASK 4: Develop Marketing Materials and Obtain Approval from SCE**

Upon award of the contract, PECI will develop, design and produce all of the materials to support the Lights for Learning fundraiser in SCE's service area. PECI has an excellent in-house marketing staff with a breadth of experience in creating materials that are attractive and effective. Drawing on this resource, printed and electronic materials will be developed to recruit organizations and to provide support and success once they sign-up.

### **TASK 5: Implement Marketing Campaign**

Marketing is Lights for Learning's primary recruitment tool. The marketing campaign will be structured to continuously recruit fundraiser participants throughout the life of the program. Direct marketing and telephone outreach will contact target organizations and the fundraising decision-makers therein. To maintain efficient use of resources, marketing efforts will be conducted using a phased approach, narrowing the aim to organizations who indicate interest in the program. PECI will develop a database of potential participants with which it may conduct its marketing efforts. The database will consist of any organizations in SCE's territory that undertake fundraising efforts, including schools, foundations and community youth organizations. It will also include organizations that have existing relationships with potential participants and possess a resource conservation, environmental or energy efficiency focus.

### **TASK 6: Enroll Customers**

PECI will be proactive in enrolling customers. To gauge interest and further promote the program, phone calls will be placed to organizations that have received program mailings. If these organizations are interested but unable to participate right away, they will be flagged for further follow-up. As interested organizations contact the program we will respond to them immediately, providing additional information and determining how to tailor the program to fit their needs.

### **TASK 7: Install Energy Efficient Hardware, Issue Customer Rebates and/or**

Perform

Program Services

#### **- Manufacturer and product selection**

**1. Identifying manufacturer partners**

**2. Developing product mix**

**3. Negotiating pricing and policies**

#### **- Marketing and Recruitment**

#### **- Participant support**

**1. Setup Coordination**

**2. Sales period**

**3. Collection and bulb delivery:**

**4. Follow up**

### **TASK 8: Inspect Installed Jobs**

The fundraiser is not a direct install program but PECI understands the need to be able to inspect installations, if necessary. Upon completion of the fundraiser, the field coordinator will pick up the completed order forms from participating organizations and return them to PECI. The order forms will contain information from each customer, including address and zip code, which can be used to do an inspection if desired.

### **TASK 9: Remedy Installation Issues**

**1. Broken bulbs**

**2. Bulbs that fail early**

Due to our long-standing relationships with lighting manufacturers, PECI will ensure that the partners selected immediately replace any bulbs that arrive burned out or broken at no cost.

### **TASK 10: Perform Customer Satisfaction Surveys**

All participating organizations will receive a postage paid satisfaction survey to identify outstanding concerns or opportunities for further work. Survey results will be tracked, and reports will be generated and shared with SCE. Topics shall include:

? Product pricing and availability

? Marketing materials

? Ease of implementation

? Product delivery

? Results and overall satisfaction

The results of the survey will be tabulated and shared with SCE.

### **TASK 11: Address Customer Satisfaction Issues**

All surveys will be reviewed upon arrival and any issues presented will be addressed promptly.

### **TASK 12: Invoice SCE for Completed Jobs**

Monthly reports will include, at a minimum:

- ? Report Narrative – brief discussion of program status, challenges, coordination activities, and next steps for the upcoming months;
- ? Supporting Documentation – includes completed surveys, energy savings, number of participating organizations, and any other relevant documentation;
- ? Expense Documentation – Invoice and backup for direct expenses;
- ? Marketing Materials – samples of materials created and/or distributed;
- ? CPUC Workbooks – if required.

### **TASK 13: Perform Program Reporting**

**T13a) Submit Program Workbook:** PECCI will build the program's supporting workbooks, to track accounting and activity information.

**T13b) Submit Program Narrative:** PECCI will provide monthly Program Summary reports. This

report will outline administrative, marketing, and direct implementation activities. Progress to goal will be tracked.

**T13c) Submit Flat File:** PECCI will provide a flat file of information extracted from the database

### **T13d) Perform Ad Hoc Reporting**

### **TASK 14: Program Ramp Down**

The Program Ramp Down will begin in October 2007. To successfully shut down the program by

December 31st, the Program will:

- ? Cease marketing and recruitment activities;
- ? Inform interested organizations of the need to have fundraisers concluded by November 1, 2007;
- ? Complete scheduled fundraisers, including any presentations;
- ? Finalize order placement, delivery and outstanding issues; and,
- ? Pay outstanding manufacturer invoices.

### **TASK 15: Shut Down the Program**

- ? Submitting final invoice to SCE
- ? Delivering final program report
- ? Providing contact information for product warranty

### **TASK 16: Respond to Miscellaneous Utility/CPUC Data Requests**

PECCI will respond to all SCE and CPUC-related data requests during the purchase order performance period.

### **TASK 17: Follow Up with Remaining and New Customer Issues**

As ENERGY STAR qualified CFLs have a 2-year guarantee, PECI will ensure that end-users have a method for receiving replacement bulbs, should they need them, even after the program shuts down.

### **TASK 18: Submit Final Program Report**

The final report will include the following items:

#### **1. Program Achievements:**

- ? Number of fundraisers conducted
- ? Number of participating organizations
- ? Number of end-users who purchased CFLs through the fundraiser
- ? Total number of bulbs sold
- ? Profits raised for participants from sale of CFLs
- ? Total incentives earned by participants, if applicable
- ? Total amount earned by participants
- ? kWh saved overall
- ? Annual savings realized by those who purchased CFLs
- ? Environmental impacts

**2. Program Challenges:** Discussion of the overall issues that may have arisen during the program period, gathered from customer satisfaction surveys and discussions with participants.

**3. Goal Attainment:** Achievements will be compared to program goals.

**4. Lessons Learned:** Results of customer satisfaction surveys, observations of program staff, and comments gleaned from conversations with product end-users will contribute to this narrative report.

**5. Program Improvement Recommendations:** Using customer satisfaction results and observations of program staff, a list of recommendations for further program improvement will be prepared and provided to SCE.

**6. Program Next Steps Proposed:** TA thoughtful recommendation that will be developed through analysis of items 1-5 above.

### **11. Customer Description**

The program will target organizations in SCE's territory that undertake fundraising efforts; including schools, foundations and community youth organizations. To help ensure that only SCE customers purchase the bulbs offered through Lights for Learning, PECI will market the Fundraiser exclusively within selected counties.

### **12. Customer Interface**

Schools, foundations, and community youth groups

### **13. Energy Measures and Program Activities**

#### **13.1. Measures Information**

CFLs

#### **13.2.1 Energy Savings and Demand Reduction Level Data**

15 watt integral CFL	34.6kwh/unit annual	.0033kw/unit peak
18 watt integral CFL	43.8kwh/unit annual	.0042kw/unit peak
25 watt integral CFL	57.7kwh/unit annual	.0055kw/unit peak
23 watt integral CFL	59.2kwh/unit annual	.0056kw/unit peak
16 watt integral CFL	33.8kwh/unit annual	.0032kw/unit peak

**13.3. Non-energy Activities (Audits, Trainings, etc.)**

Not Applicable

**13.4. Subcontractor Activities**

**13.5. Quality Assurance and Evaluation Activities**

**13.6. Marketing Activities**

See Program Implementation for marketing.