



An EDISON INTERNATIONAL Company

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August 1, 2002

The Honorable Sarah R. Thomas  
Administrative Law Judge (ALJ)  
California Public Utilities Commission  
505 Van Ness Avenue  
San Francisco, California 94102

Re: Rulemaking 01-08-028 – Second Quarter Energy Efficiency Report

Dear Judge Thomas:

Enclosed is Southern California Edison Company's (SCE) second quarterly Energy Efficiency Expenditure Report (Report) pursuant to the California Public Utilities Commission's (Commission) Energy Efficiency Policy Manual (Manual) adopted in Decision 01-11-066. The Manual requires SCE to submit the Report to the Commission on August 1, 2002, and to make it available to all interested parties relevant to this proceeding.

We appreciate your courtesy in this matter.

Very truly yours,

Christa Piantadosi

cc: Zenaida Tapawan-Conway, Energy Division  
Ariana Merlino, Energy Division  
Tim Drew, Energy Division

Enclosure



SOUTHERN CALIFORNIA  
**EDISON**

An *EDISON INTERNATIONAL* Company

(U 338-E)

Rulemaking No. 01-08-028

**Southern California Edison Company's  
2002 Energy Efficiency Programs  
Second Quarter Report**

August 1, 2002

# **Southern California Edison Company's 2002 Energy Efficiency Programs Second Quarter Report**

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Program Title: **Statewide Residential Appliance Recycling Program**

**I. Program Overview**

The Statewide Residential Appliance Recycling Program (RARP) is a statewide investor-owned utilities (IOU) program designed to reduce energy usage by allowing eligible residential customers (single family and multifamily owners/landlords and tenants) to dispose of their working, inefficient primary and secondary refrigerators and freezers in an environmentally safe manner. A recycling incentive of \$35 or a five-pack of compact fluorescent lamps (CFLs) is offered to customers for participation. The program covers the service territories of Pacific Gas and Electric (PG&E), Southern California Edison (SCE), and San Diego Gas & Electric (SDG&E).

**II. Program Summary**

1. Total program budget = \$4,000,000

Expenditures (includes program commitments) to date = \$499,984

2. Total net demand reduction and energy savings:

	<b>Net kW*</b>	<b>Net kWh*</b>	<b>Units</b>
<b>Projected</b>	5,643	36,861,000	20,535
<b>Actual</b>	1,050	6,839,000	3,994
<b>Committed</b>	730	4,791,000	2,799
<b>Total Recorded</b>	1,780	11,630,000	6,793

\*Note: The projected net energy savings and demand reductions differ from the CPUC targets for this program. It appears that an error was made in the development of the CPUC savings targets for this program. The CPUC unit target remains unchanged.

3. Total number of customers served:

Projected: 20,535

Actual: 1,780

4. Projected and actual number of units:

Please refer to program activity tables in corresponding program workbook.

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5. Total rebate (\$) paid = \$1,062,661 (includes customer commitments).

**III. Program Implementation Status**

1. Status of program delivery  
No change from the program implementation plan submitted to the California Public Utilities Commission on May 20, 2002.
2. Customer Enrollment  
Two blank copies of the Appliance Recycling program application forms were sent to the Commission's Energy Division by SCE.
3. Workbook  
Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.
4. Training  
The program did not sponsor any training during the quarter.

5. Marketing

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/Each Method</b>
“Save Energy, Save Money” brochure	250,000	Authorized payment agencies, Customer Communication Center, Public Affairs	Varies
Residential energy usage questionnaire	660,367	Direct Mail	7 @ approx. 100,000 each
Radio series promoting RARP	3 times, business hours and lunch hour	Radio in Los Angeles area	--

Other Activities –

- The statewide RARP marketing strategy, with an emphasis on har-to-reach (HTR), was developed during the 2<sup>nd</sup> quarter. It includes web sites, press release announcing the program, and various bill inserts.
- SCE conducted several direct mail campaigns that referenced the Appliance Recycling program as part of an overarching marketing campaign. (See, marketing activities listed above) SCE also planned marketing activities focused on HTR

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customer segments such as the development of fact sheets and their distribution through various targeted events and media.

- Efforts were coordinated with the *FlexYourPower* campaign to optimally leverage program offerings, which took place through their advertising.

6. Hard to Reach

In the second quarter of 2002, 54% of the units collected in SCE's service territory were from hard-to-reach geographic areas defined as rural, moderate income and/or multifamily. SCE's 2002 goal is to have 54% of the units collected from this customer segment.

**IV. Program Accomplishments**

- Contract executed with the Appliance Recycling Center of America to collect and recycle units in the participating service territories.
- Program was available to customers in SCE's service territory on April 1, 2002.
- Developed the program's marketing strategy, with emphasis on the HTR customer segments. The HTR component of the marketing plan is being implemented in the third quarter.

**V. Program Challenges**

No significant problems encountered to date.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

The following list itemizes the various regulatory compliance items issued by the California Public Utilities Commission directly relating to this program.

Decision 02-03-056 -

*"We set the refrigerator/freezer recycling incentive payment at \$35, with the option for an energy efficiency product incentive (i.e., a five pack of compact fluorescent light bulbs) in exchange for the removal of an operable primary or secondary unit."* (mimeo, p.12)

Response -

The Residential Appliance Recycling program provides customers with a \$35 incentive or a five pack of compact fluorescent light bulbs in exchange for the removal of an operable primary or secondary refrigerator or freezer.

Decision 02-03-056 -

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*“The IOUs shall run this program at a unit cost of \$200 per unit.” (mimeo, p.13)*

Response –

The IOUs have designed a cost efficient program that costs less than the CPUC’s required \$200 per unit costs.

Decision 02-03-056 -

*“We will reduce administrative expense by appointing Edison as the one administrator to oversee the appliance recycling program statewide.” (mimeo, p.13)*

Response –

SCE has taken the lead in administering the Residential Appliance Recycling program in 2002.

Decision 02-03-056 -

*“PG&E and SDG&E should arrange to transfer funds to Edison for payment purposes.” (mimeo, p.14)*

Response –

The IOUs are working on a transfer funding agreement that will transfer funds from PG&E and SDG&E to SCE in support of this program.

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Program Title: **Single Family Energy Efficiency Rebates Program**

**I. Program Overview**

The Single Family Energy Efficiency Rebates program is a statewide program, administered by the four California investor-owned utilities, which provides rebates on various home improvement products, heating and cooling equipment, appliances, and residential pool equipment.

**II. Program Summary**

1. Total program budget = \$5,850,000  
Expenditures to date = \$437,907

2. Total net demand reduction and energy savings

	Net kW	Net kWh
<b>Projected</b>	6,770	19,039,000
<b>Actual</b>	535	690,279
<b>Committed</b>	1,107	1,153,136
<b>Total Recorded</b>	1,642	1,843,415

3. Total number of customers served:  
Projected: Projection of the number of customers to be served was not provided in the implementation plan.  
Actual: 6,566 residential customer rebate applications received for the Single Family Rebate Program.
4. Projected and actual number of units:  
Please refer to tables shown in corresponding program workbook.
5. Total rebate (\$) paid:  
\$166,171 = paid, \$417,643 = committed.

**III. Program Implementation Status**

1. Status of program delivery  
There are no changes to the delivery mechanism described in the program implementation plan submitted to the California Public Utilities Commission (CPUC) on May 20, 2002.
2. Customer Enrollment

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Two blank copies of SCE's single-family rebate application form were sent to the California Public Utilities Commission's Energy Division.

3. Workbook

Please refer to the informational tables shown in corresponding program workbooks for details of program expenditures and activities.

4. Training

The IOUs partnered with California State Department of Consumer Affairs to conduct a Manufacturer and Retailer Marketing Meeting to discuss rebate programs available statewide and facilitate information exchange with manufacturers and retailers about the impact of rebate programs on their business.

6. Marketing

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/Each Method</b>
Applications	9,000	Mail	9,000
Electric Service Guide	3.9 Million	Bill Insert	3.9 Million
Save Money/Save Energy Self Selection Tool	10,000	Direct Contact	10,000

Other Marketing Activities:

- An Electric Service Guide was mailed in May to all residential customers as a bill insert. This guide, in both English and Spanish, informed customers of the benefits of replacing appliances with energy efficient models.
- 250,000 copies of a General Program Brochure were printed and made available for general distribution. This brochure is used whenever SCE is in attendance at any public event or a customer or contractor asks for information on our program.
- A Save Money/Save Energy Self Selection Tool was developed and mailed to 660,000 residential customers. This tool helps customers focus on which energy efficiency measures may be appropriate for them.

6. Hard-to-Reach

SCE has modified the hard-to-reach goals stated in its program implementation plan filed on May 20, 2002. The original HTR baseline (i.e., 2001 activities) excluded key HTR customer segments, namely rural

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customers. Below are the revisions to the HTR goal. In no way does this revision decrease SCE's HTR goal filed in its original program implementation plan filing.

Original HTR Goal (as stated in SCE's filing on May 20, 2002):  
SCE had 12% of 2001 paid and committed single-family rebate applications from hard-to-reach geographic areas. The 2002 target is that 14% (i.e., 1.2 times the 2001 percentage) of Statewide Home Energy Efficiency Rebate applications come from these hard-to-reach geographic areas.

Revised HTR Goal:  
Adding rural customers to the 2001 baseline figure results in 28% of 2001 paid and committed single-family rebate applications from hard-to-reach geographic areas in SCE's service territory. The 2002 target is that 34% (i.e., 1.2 times the 28%) of Statewide Home Energy Efficiency Rebate applications come from these hard-to-reach geographic areas.

In the second quarter of 2002, the Single Family Rebate program received 34% of program applications from HTR areas.

**IV. Program Accomplishments**

During the second quarter, the statewide utilities worked together in cooperation with other third party agencies to develop a statewide consistent rebate program, which delivers enhanced energy savings throughout the state of California. Key activities include:

- Kickoff of the statewide program to statewide retailers and manufacturers.
- Developed a standard customer application with consistent participation requirements, terms and conditions, products, product specifications and rebate levels.
- Established statewide customer access to utility Web sites to include lists of qualifying products, and Web links to Energy Star<sup>®</sup> qualified product listings. Customers may customize queries to receive a list of equipment that meet specific needs.
- Provided review and input of *Flex Your Power* campaign materials and advertisements.
- In conjunction with the *Flex Your Power* campaign, jointly conduct a manufacturer and retailer marketing meeting to discuss rebate programs available statewide and facilitate information exchange with

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manufacturers and retailers about the impact of rebate programs on their business.

- Established a statewide qualifying product lists for non-Energy Star<sup>®</sup> rated products.
- Made enhancements/improvements to the rebate processing systems to reduce customer wait time and increase customer response efficiency.

**V. Program Challenges**

No significant problems encountered to date.

**VI. Customer Disputes**

To date there have been no formal disputes logged against this program.

**VII. Compliance Items**

There are no program-specific compliance items issued by the California Public Utilities Commission regarding this program.

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Program Title: **Statewide Residential Retrofit Multifamily Energy Efficiency Rebates**

**I. Program Overview**

The 2002 Multifamily Energy Efficiency Rebate program is a statewide program providing a broad list of qualifying energy efficiency measures. Prescribed rebates are available for the installation of qualifying energy-efficient improvements in apartment dwelling units and in the common areas of apartment and condominium complexes, and common areas of mobile home parks. Property owners and property managers of existing residential multifamily complexes with five or more dwelling units may qualify. The program is uniform throughout all the investor-owned utilities' (IOUs) service areas, with consistent terms and requirements and implementation characteristics, including rebate levels and application procedures.

**II. Program Summary**

1. Total program budget = \$2,000,000

Expenditures (includes program commitments) to date = \$713,934

2. Total net demand reduction and energy savings:

	<b>Net Peak kW</b>	<b>Net kWh</b>
<b>Projected</b>	1,090	8,850,000
<b>Actual</b>	1	3,480
<b>Committed</b>	148	1,064,464
<b>Total Recorded</b>	149	1,067,944

3. Total number of customers served:

Projected: No projection included in the program implementation plan

Actual: 65

4. Projected and actual number of units:

Please refer to program activity tables in corresponding program workbook.

5. Total rebate (\$) paid = \$2,880. \$645,388 in rebates committed to customers.

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**III. Program Implementation Status**

1. Status of program delivery

There have been no changes in the delivery mechanism since submission of the program implementation plan submitted in May 2002 except for the following:

- Indoor Light Fixtures: fully subscribed (10,000 units), currently not being offered.

2. Customer Enrollment

Two blank copies of SCE's multifamily rebate application form were sent to the California Public Utilities Commission's Energy Division.

4. Workbook

Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.

4. Training

The program did not sponsor any training during the quarter.

7. Marketing

<b>Marketing Piece</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b>No. Per Method</b>
Multifamily Energy Efficiency Rebate Program Application Package	1	Distributed through: Energy Efficiency Call Center Representatives and voice response unit  SCE Energy Efficiency Website	Toll free calls: 800 Web site: --
Brochure: "Save Energy Save Money"	250,000	Various methods: Call Centers, Public Relations, and Other SCE Internal Leveraging	5,300 (est.)
Article: "Take Advantage of the 2002 Multifamily Energy Efficiency Rebates", Official California Apartment	1	Monthly Periodical published by Apartment Association of California Southern Cities	2,500 Multifamily Property Owners/Managers and interested 3 <sup>rd</sup> parties.

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Journal, June 2002			
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The Multifamily Rebate program information can be found by accessing the program website at [www.sce.com](http://www.sce.com).

6. Hard-to-Reach

SCE has modified its hard-to-reach (HTR) goals stated in its program implementation plan filed on May 20, 2002. The original HTR baseline (i.e., 2001 activities) included renters. Since multifamily is primarily renters this does not appear to be a HTR segment with this program. Below are the revisions to the HTR goal. In no way does this revision decrease SCE's HTR goal filed in its original program implementation plan filing. The target is still 10% over the 2001 baseline.

Original HTR Goal (as stated in SCE's May 20, 2002 filing):

SCE had 43% of 2001 paid and committed multifamily rebate applications from hard-to-reach customer groups. The 2002 target is that 47% of Multifamily Energy Efficiency Rebate applications come from this same hard-to-reach group.

Revised HTR Goal:

Removing renters from the 2001 baseline figure results in 33% of 2001 paid and committed multifamily rebate applications from hard-to-reach customer groups in SCE's service territory. The 2002 target is that 36% of Multifamily Energy Efficiency Rebate applications come from this same hard-to-reach group.

During the second quarter of 2002, approximately 82% of the Multifamily Rebate program application came from hard-to-reach customer segments.

**IV. Program Accomplishments**

On April 1, 2002, the statewide Multifamily Energy Efficiency Rebate Program was launched on all four IOU's websites. The same measures were made available to multifamily property owners and property managers with five or more units. All four IOU's coordinated to design and develop a consistent application for accessibility on the respective websites, and hard copy form, for mailing purposes.

- All Statewide Multifamily applications list all four IOUs' websites.
- All four IOUs are collaboratively working with *FlexYourPower* and *Univision* and US DOE/EPA sponsored –

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Energy Star program and Energy Star Partners to promote energy efficiency in California.

- All four utilities' programs are collaboratively listed and accessible on the California Energy Commission's Web site at <http://www.consumerenergycenter.org/index.html>.
- In May 2002, the IOUs in conjunction with California water and municipal utilities conducted a manufacturers/retailers meeting, with our Trade Allies to present the statewide implementation of the program in Downey, California.
- All four IOUs have cross-referenced other energy efficiency programs, including the low-income energy efficiency programs and CARE, administered by the IOU.
- Teamed with Southern California Gas Company in presenting an overview of the statewide multifamily rebate program to the Orange County Property Owners at the April association meeting.

**V. Program Challenges**

No significant problems encountered to date.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

There are no program specific compliance items issued by the California Public Utilities Commission regarding this program.

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Program Title: **Home Energy Efficiency Survey Program**

**I. Program Overview**

The Home Energy Efficiency Survey (HEES) Program employs two delivery channels: Mail-In surveys, which include targeted direct mailings, and the interactive online survey, which provides immediate results online, to provide customers with valuable information they can apply to assist them with understanding, controlling and reducing energy use in their homes.

**II. Program Summary**

1. Total program budget = \$819,000  
Expenditures to date = \$46,485

2. Total net demand reduction and energy savings  
Categorized as an information program consistent with the California Public Utilities Commission's 2002 Energy Efficiency Policy Manual.

3. Total number of customers served:

	<b>Mail-In Survey Targets</b>	<b>Online Survey Targets</b>
Projected	18,000	12,000
Actual	151	1,296

4. Projected and actual number of units:  
Please refer to tables shown in corresponding program workbook.

5. Total rebate (\$) paid.  
Not applicable to this information program.

**III. Program Implementation Status**

1. Status of program delivery  
No change from the program implementation plan submitted to the California Public Utilities Commission (CPUC) on May 20, 2002.

2. Customer Enrollment  
Sample copies of these audits, in all languages, were sent to the CPUC's Energy Division.

3. Workbook  
Please refer to informational tables shown in the corresponding program workbook for details of program expenditures and program activities.

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4. Training

Customer training is typically not conducted due to the nature of the program. The energy audits are created in simplified form to help the customer's complete an energy audit.

8. Marketing

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/Each Method</b>
Electric Service Guide	1	Customer Connection Insert	Residential
Alphabet House Radio spot Good Neighbor Radio spot	2	Southern California Radio	Residential
Save Energy, Save Money brochure	1	Handouts, Mail, Online	Residential
English, Spanish, Chinese Surveys online	--	<a href="http://www.sce.com">www.sce.com</a> web site	Residential

9. Hard-to-Reach

The Commission directed the IOUs to create a Spanish and an Asian-language translation of the survey within two months of program launch, and to send 50% of the mailed HEES to Hard-to-Reach (HTR) customers. In response, SCE's 2002 HTR goal is to solicit 9,000 mail-in surveys to hard-to reach customers as defined by the Commission. From April 1, 2002, through June 30, 2002, no surveys have been mailed to the hard to reach customers due to the development of the marketing plans described above. The direct mail campaign, which includes HTR, is scheduled for mid-July.

**IV. Program Accomplishments**

The HEES Program has been available to customers, via Mail-In and interactive online surveys since the beginning of the second quarter. The Mail-In program contacted 100,000 customers in the second quarter soliciting participation. The online program has been promoted via the Web site and a press release.

Translated versions of the Mail-In survey, in Spanish and Chinese, were posted on the Web site on June 1, 2002, meeting the Commission directive. Customers may download, print and mail-in these translated surveys, or request direct mail participation via the call centers.

- Designed a single statewide consistent English language version of the Mail-In survey.

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- Completed translation of statewide survey into Spanish and one Asian language per utility. Spanish mail-in surveys are now available in all four IOU service territories, in Chinese in PG&E, SoCalGas, and SCE service territories, and in Vietnamese in SDG&E's service territory. As directed by the California Public Utilities Commission, each IOU created an Asian language audit based on the most predominant Asian language in the service territory. Mail-in surveys are also available in multiple languages, as outlined above, via each IOU's web site. Consumers are able to download, complete and mail back for processing.
- In coordination with other party statewide contract efforts, IOU's worked with *Univision*, to develop television announcement copy promoting the Home Energy Efficiency Survey. Announcements are scheduled to air in August.

**V. Program Challenges**

No significant problems encountered to date.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

The following list itemizes the various regulatory compliance items issued by the California Public Utilities Commission directly relating to this program.

Decision 02-03-056 –

*“At least 50% of the mailed statewide residential Home Energy Efficiency Surveys shall be sent to hard-to-reach customers. The IOUs shall develop and make available a Spanish-language version of the survey, and a version in the most prevalent Asian language in the IOU's territory, for both mailing and web-posting within two months of the launch of their survey programs.” [Ordering Paragraph No. 5, p. 62]*

Response -

IOU's are actively targeting HTR customers via direct mailing efforts. These efforts began during mid-July. SCE met the Commission's mandate for having Spanish and Asian language version surveys available for mailing and web posting within two months of the programs launch date, or June 1, 2002.

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Program Title: **California ENERGY STAR® New Homes Programs**

- California ENERGY STAR® New Homes – Multi-family
- California ENERGY STAR® New Homes – Single Family

**I. Program Overview**

The California Energy Star New Homes Programs (CESNHP) are designed to encourage single family and multi-family (including rental apartments, condominiums, townhomes; as well as high-rise buildings on a pilot basis) builders to construct homes that exceed Title 24 through a combination of financial incentives, design assistance, and education. These performance-based programs are designed to encourage homebuilders to construct single family and multi-family dwellings that are 15% and 20% more efficient than required by the 2001 Residential Energy Efficiency Standards – initiated in State Assembly Bill (AB) 970. The 15% level has been designated by the EPA as the new Energy Star® homes baseline for California, subsequent to the Title 24 revisions (2001 Standards) brought about in AB 970. As a result, buyers of **single-family homes, and renters of multifamily** have energy-efficient, money-saving, comfort and quality alternatives compared to standard new housing.

**II. Program Summary**

**2. Single Family:**

Total program budget = \$3,500,000

Expenditures to date = \$153,512

**Multi-family:**

Program budget = \$500,000

Expenditures to date = \$10,096

**3. Total net demand reduction and energy savings:**

**Single Family**

	<b>Net Peak kW</b>	<b>Net kWh</b>
<b>Projected</b>	4,204	3,587,580
<b>Actual</b>	-	-

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<b>Committed</b>	299	278,320
<b>Total Recorded</b>	299	278,320

**Multi-Family**

	<b>Net Peak kW</b>	<b>Net kWh</b>
<b>Projected</b>	380	358,000
<b>Actual</b>	-	-
<b>Committed</b>	-	-
<b>Total Recorded</b>	-	-

3. Total number of customers served:

Projected:

4,660 Single Family units

2,000 Multi-Family units

Actual (Includes Committed):

355 Single Family units

0 Multi-Family units

4. Projected and actual number of units:

Please refer to tables in the corresponding program workbook.

5. Total rebate (\$) paid:

**Single Family:** \$0 = paid, \$271,970 = committed.

**Multi-Family:** \$0 = paid, \$0 = committed.

**III. Program Implementation Status**

1. Status of program delivery

No change from the program implementation plan submitted to the California Public Utilities Commission on May 20, 2002.

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2. Customer Enrollment

Two blank copies of SCE's single-family and multifamily application forms were sent to the CPUC's Energy Division.

3. Workbook

Please refer to the informational tables shown in the corresponding workbook for details of program expenditures and activities.

2. Training

The program did not sponsor any external training during the quarter.

5. Marketing

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/Each Method</b>
MF Applications	200	Direct Contact or Direct Mail	10
SF Applications	300	Direct Contact or Direct Mail	100
Tri-fold Brochure	2500	Trade Show Handouts or Direct Contact/Mail	1200

Other Marketing Activities:

- On May 13, 2002 attended the California Building Industry Association's (CBIA) Legislative Conference where the statewide CESNHP was presented at the Energy Sub-Committee meeting.
- On May 22, 2002 co-sponsored a display table at the BIA/OC's quarterly PASS luncheon.
- In May 2002, CHEERS featured a story on the new CESNHP in their monthly newsletter.
- Sponsored a booth at the annual Pacific Coast Builders Conference where the CESNHP was showcased. Due to the prominent role CHEERS plays in the statewide RNC energy efficiency arena, the organization was also

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highlighted in a booth hosted by SCE. Roughly 24,000 members of the building industry attended the show with over 600 exhibitors.

- On April 4, 2002 attended the Palm Springs chapter of the BIA where the CESNHP was presented to BIA members and local government officials.
- On June 13, 2002, presented the CESNHP to staff and students of Eisenhower High School in Rialto, as well as local government officials in coordination with the City of Rialto to prepare an energy efficiency plan for new home communities being developed in Rialto.
- Created an electronic mailbox ([scenewhomes@sce.com](mailto:scenewhomes@sce.com)) specific to residential new construction in support of the CESNHP. The mailbox is titled "SCE New Homes" and is accessible both independent of and through SCE's web page, and is intended to receive electronic compliance submittals, field questions for both the CESNHP multi-family and single family programs, respond to requests for CESNHP applications, as well as reply to general residential new construction questions. The automatic response issued when an email is received will have a CESNHP promotional tagline.

[www.socalgas.com](http://www.socalgas.com), [www.sdge.com](http://www.sdge.com), [www.pge.com](http://www.pge.com), have placed updated program information on the CESNHP. Final revisions are being submitted for [www.sce.com](http://www.sce.com) and are due to be available August 1, 2002.

6. Hard-to-Reach

20% of direct implementation funds need to be directed to the Hard-to-Reach markets. To date, SCE is actively working on several potential projects but has not secured contracts at this time.

**IV. Program Accomplishments**

—The CESNHP (both Single Family and Multi-Family programs) was officially launched in April 2002, but was formally introduced to the building industry at the Pacific Coast Builders Conference (PCBC), June 26 – 28, at the Moscone Convention Center in San Francisco. Through a collaborative advertising campaign, PG&E, SCE, SDG&E, and SoCalGas ran ads in seven statewide trade journals with a combined readership of over 46,000 building industry professionals. The ads ran from May 27 through June 24 and also included taglines directing the audience to two PCBC exhibitor booths sponsored by the IOUs. In support of the statewide program effort, identical program applications for Multi-Family and Single Family were developed and distributed by the investor-owned utilities for CESNHPs.

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In SCE's multifamily program, SCE conducted a competitive bid process to select a field delivery team. The contract was awarded in early July, and it is anticipated that there will be significant activity in the third quarter to report.

**V. Program Challenges**

No significant problems encountered to date.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

The following list itemizes the various regulatory compliance items issued by the California Public Utilities Commission directly relating to this program.

Decision 02-03-056, Ordering Paragraph 6 states:

*"To ensure that Public Goods Charge (PGC) funds are devoted to hard-to-reach customers served by the statewide residential new construction program, 20% of the direct implementation funds allocated to this program shall be reserved for units constructed for hard-to-reach customers as defined in this decision and in D. 01-11-066."*

Response:

To ensure program focus on hard-to-reach customer groups, SCE will focus 20% of the direct implementation budget on the multifamily sector.

Decision 02-03-056, Ordering Paragraph 8 states:

*"The IOUs shall develop two separate budgets and program plans for single-family and multi-family residential new construction programs in their Program Implementation Plans. Edison and SDG&E shall include benchmarks for multi-family units with their Plans; PG&E and SoCalGas have already done so and need not do so in their Plans. At least 15% of all claimed installations of energy efficiency measures shall be verified with an inspection by a CHEERS or HERS-certified inspector."*

Response:

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Separate programs for Single Family and Multi-Family homes were developed and implemented as of April 2002. SCE has developed inspection procedures that will ensure that at least 15% of all claimed installations of energy efficiency measures are verified with an inspection. To date, program participants have not yet finished construction on any project.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Program Title: **Nonresidential Standard Performance Contract (SPC) Program**

**I. Program Overview**

This statewide program offers cash incentives for custom-designed energy savings retrofits of existing facilities to large and medium businesses, but small and very small businesses can also participate if their measures do not qualify for the Express Efficiency program.

Any utility customer paying the gas or electric Public Goods Charge (PGC) in the investor-owned service territories would be eligible. This includes utility customers who may have opted to purchase electricity or gas from other suppliers. Third party Energy Efficiency Service Providers (EESPs) who sponsor energy efficiency retrofit projects at utility customer facilities are eligible to participate.

**II. Program Summary**

1. Total program budget = \$9,650,000  
Expenditures to date = \$308,058

2. Total net demand reduction and energy savings:

	<b>Net kW</b>	<b>Net kWh</b>
<b>Projected</b>	8,620	41,719,000
<b>Actual</b>	0	0
<b>Committed*</b>	8,087	54,715,527
<b>Total Recorded</b>	8,087	54,715,527

\*note: does not include customer applications currently under review.

3. Total number of customers served

Projected: 75

Actual: 85

4. Projected and actual number of units:

Please refer to tables in the corresponding program workbook.

5. Total rebate (\$) paid = \$0. \$5,527,424 in rebates committed to approved customer projects. Additional applications totaling \$6.6 million in rebates are currently in the application review process.

**III. Program Implementation Status**

1. Status of program delivery

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

No change from the program implementation plan submitted to the California Public Utilities Commission (Commission) on May 20, 2002.

2. Customer Enrollment

As part of program participation, customers/EESPs are required to apply for program funds through an application process. Copies of these applications were sent to the Commission's Energy Division staff.

3. Workbook

Please refer to informational tables shown in the corresponding program workbook for details of program expenditures and program activities.

4. Training

No customer/EESP training was conducted. However, SCE's customer/program representatives did field various questions from potential customers on the 2002 SPC program.

5. Marketing

List Pieces	Quantity	Method of Delivery	# w/Each Method
Website	1 site	www.scespc.com	--

6. Hard to Reach

The SPC program was not designed for the-hard-to-reach customers, however the program outreach is to all customers.

**IV. Program Accomplishments**

The 2002 statewide SPC program officially began on April 1, 2002. During the second quarter, SCE committed to customers 70% of its allocated incentive budget for the SPC program. The SCE program will be fully committed during the third quarter following the approval of applications currently undergoing review. New project applications are being placed on the program's waitlist and may be funded if any active projects are cancelled. Other program accomplishments included:

- IOUs have one Policy and Procedures Manual
- One CD ROM was used by all IOU

**V. Program Challenges**

Strong customer demand for the SPC program continued in 2002. This demand outstripped the available program funds. In response, the statewide program

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

developed a customer Wait List. This will enable the program to quickly identify participants/projects if additional program funds become available in the future.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

The following list itemizes the various regulatory compliance items issued by the California Public Utilities Commission directly relating to this program.

Decision 02-03-056 states in Ordering Paragraph 9:

*“The IOUs shall cooperate with third parties in carrying out nonresidential Standard Performance Contract (SPC) programs approved in this decision.”*

Response-

Thirty percent of the approved projects are sponsored through a third party EESP. Utility representatives have been instrumental in providing information and assistance to SCE’s customers.

Decision 02-03-056 states in Ordering Paragraph 10:

*“At least seventy percent (70%) of the IOUs’ nonresidential SPC funds shall be reserved for non-lighting retrofits.”*

Response –

The SPC program guidelines were modified to require that at least seventy percent (70%) of the IOUs SPC funds be reserved for non-lighting retrofit projects. Currently, 20% of the SCE’s program incentive budget has been reserved for lighting retrofits.

Decision 02-03-056 states in Ordering Paragraph 11:

*“Large nonresidential customers carrying out first generation energy efficient lighting retrofits shall not receive financial incentives from PGC funds.”*

Response –

The 2002 SPC program manual, which is available to all applicants, specifically defines the ineligible “first generation” lighting technology, and also defines the eligible “second generation” and “third generation” technologies. The application reviewers are highly knowledgeable with these definitions, and apply the eligibility rules to each lighting project application. Large nonresidential customers carrying out first generation energy efficient lighting retrofits have not received SPC incentives.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Program Title: **Statewide Express Efficiency Program**

**I. Program Overview**

This statewide program offers nonresidential prescriptive rebates for specific, proven energy efficient measures including lighting, HVAC, refrigeration, agriculture, gas, LED lighting technology and motor retrofit measures. The program is limited to small and medium customers with an emphasis on the hard-to-reach sector.

**II. Program Summary**

1. Total program budget = \$6,000,000

Expenditures to date = \$410,990

2. Total net demand reduction and energy savings:

Due to the seasonality of this program, demand reduction and energy savings are planned for the third and fourth quarters.

	<b>Net Peak kW</b>	<b>Net kWh</b>
<b>Projected</b>	13,930	64,303,000
<b>Actual</b>	153	690,248
<b>Committed</b>	7,438	16,369,295
<b>Total Recorded</b>	7,591	17,059,543

3. Total number of customers served:

Actual = 1,005 (includes committed customer projects).

4. Projected and actual number of units:

Please refer to the program activity tables in the corresponding program workbook.

5. Total rebate (\$) paid = \$60,040 (includes customer commitments).

**III. Program Implementation Status**

1. Status of program delivery

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

The only change that has occurred since program implementation is in regard to the aggregation exception of three classes of customers considered “underserved.” Prior to the change, these customers were required to aggregate the demand of all their accounts thereby excluding them from program participation. Based upon agreement among all the IOUs and the Energy Division, these customers are now no longer required to aggregate. It was also agreed that each customer’s account would still be subject to the “not to exceed 500 kW” eligibility rule. The exception language reads as follows:

Schools, Non-Profits and Tax-Exempt Customers -

Schools, non-profit organizations and tax-exempt customers are excluded under the definition of chain accounts and are, therefore, not required to aggregate their accounts. However, individual electric accounts must not exceed 500 kW. These sectors include:

- *Schools*: includes private and public schools and universities, school districts, and other educational organizations.
- *Tax-exempt entities*: includes local governments, cities, counties, libraries, fire departments, water departments, and sanitation districts.
- *Non-profit organizations*: includes all categories of non-profit organizations as defined in IRS Publication 557, “*Tax-Exempt Status for Your Organization*”.

2. Customer Enrollment

Two blank copies of the program’s customer application forms were sent to the California Public Utilities Commission’s Energy Division.

3. Workbook

Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.

4. Training

Vendor Kickoffs – Attendees are presented with Express and other programs’ details. Presenters provide overall programs’ comparison, answer questions and distribute programs’ applications and fact sheets. SCE’s vendor Kick-off was held on April 15, 2002 in our CTAC center in Irwindale. This event achieved an unprecedented attendance level of over 200 people.

Technology Seminars for customers, vendors and others – Attendees are presented with energy savings instruction and how the Express program can be used to help make their projects more affordable. Specifically members of the Design and Engineering Services organization provided technical detail on the mechanics of the specific Express Efficiency measures in their specialty technology area. Also, detailed information on the participation procedures was covered. Technology areas included, Refrigeration (1 seminar tailored

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

for Supermarkets and 1 seminar for general refrigeration measures), Air Conditioning, Motors, and Lighting.

In efforts to encourage program participation in rural areas, technology seminars were offered in Tulare, San Jacinto, Thousand Oaks, Victorville, and Palm Springs in addition to our CTAC center in Irwindale. Attendance ranged from 9 to 30 vendors. The offerings were cancelled in San Jacinto and Thousand Oaks due to lack of customer/ vendor response. Some seminars were presented with separate in-language work groups to facilitate participation among these hard to reach segments.

5. Marketing

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/Each Method</b>
Applications	68,000	Events, customer representatives, customer requests	28,000
	Total		Total
English	60,000		20,000
Spanish	2,000		1,500
Chinese	2,000		500
Korean	2,000		2,000
Vietnamese	2,000		1,500
			500
			250
Brochures			
Save Energy/ Save Money	50,000	Event Handout	25,000
Mailings			
Business Solutions Bundle	290,000	US Mail	290,000
Business Connection	290,000	Bill Insert	290,000

Other Marketing Activities:

Community Based Organization Outreach -

In addition to the technology seminars and vendor kick-off events, representatives of SCE including account executives, engineers, and program managers held a variety of nearly 20 events with customer groups. These groups included trade and ethnic associations, in-language press (radio, TV, newspaper), faith-based organizations and regional groups. Well over 3,000

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people attended these events. As representatives of their respective organizations, these people then carried the message back to encourage program participation among their memberships. Of the events held, many were targeted to an audience of primarily members of hard-to-reach segments.

Non-Profits, Schools, Tax-Exempt organizations -  
SCE made one-on-one presentations to major customers who are eligible based on the original criteria and also those eligible based on the new aggregation exception rules. Additionally, SCE worked in conjunction with Southern California Gas Company to market the program to the four local area chapters of the California Association of Non-Profits (Los Angeles, Orange County, San Bernardino, and Tulare) to maximize the participation of this underserved group.

Contractors/ Vendors -  
Participating contractors and vendors were provided program information through mailings and e-mail blasts.

6. Hard to Reach

The 2002 Express Efficiency program's hard-to-reach goal is to increase participation of hard-to-reach customers to 47% as compared to the participation of these customers in the 2001 Express Efficiency program. In the second quarter of 2002, participation by this customer group was 49%.

**IV. Program Accomplishments**

The statewide Express program began on April 1, 2002 with the primary focus being on hard-to-reach customers. All collateral materials and the reservation system were available. Promotional and delivery vehicles such as advertisements in local publications, vendor rollouts, participation in community events, and other approaches were planned and several implemented. Ongoing program implementation includes workshops, seminars, website updates and community based organization (CBO) outreach.

To raise program awareness and increase participation, a special "Summer Sale" providing enhanced rebate levels was planned for a July announcement.

As agreed upon, the program included statewide consistency in all aspects including:

- Six technology specific applications;
- One Policy and Procedures Manual;
- One Customer Handbook; and
- One Vendor Guidelines and Participation Agreement.

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All four IOUs ~~instated~~ implemented a rebate funds reservation system to ensure funding to customers in advance of product installation.

**V. Program Challenges**

No significant problems encountered to date.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

The following list itemizes the various regulatory compliance items issued by the California Public Utilities Commission directly relating to this program.

Decision 02-03-056 -

*“However, because Express Efficiency and SPC share the small and medium-sized customer market, opportunities exist to leverage promotional activities. Recognizing the magnitude of this market and the current difficulties in satisfying its potential, we follow the recommendation of the 1999 State-Level Small/Medium Nonresidential MA&E Study<sup>1</sup> and instruct the IOUs to ensure that all nonresidential programs available to this customer class coordinate information, marketing, and education efforts.”* (mimeo, p. 25)

Response –

To comply, the IOUs have provided materials and side-by-side Express and SPC program comparisons at all customer presentations and in handout packets. On an

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<sup>1</sup> 1999 State-Level Small/Medium Nonresidential MA&E Study, Final Report, Volume 1 of 2. Xenergy, Inc. and Quantum Consulting, Inc., December 6, 2000, at 2-28 – 2-29, available at <http://www.cpuc.ca.gov/static/industry/electric/energy+efficiency/energy+efficiency+rulemaking.htm>

<sup>2</sup> In addition, we require the IOUs to work together to market all of their statewide programs. See Section IV(C)(1) below.

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individual basis, customers have also been guided to the appropriate program based upon their type of project.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Program Title: **Nonresidential Energy Audit Program**

**I. Program Overview**

This statewide program offers free energy audits to nonresidential customers. The audit provides customer assistance in the form of information on the benefits of installing measures or adopting practices that can reduce the customer's utility bills. The energy audit recommendations are based on the customer's recent billing history and/or customer-specific information regarding equipment and building characteristics.

**II. Program Summary**

1. Total program budget = \$1,400,000

Expenditures to date = \$129,174

2. Total net demand reduction and energy savings:

Categorized as an information program consistent with the California Public Utilities Commission's 2002 Energy Efficiency Policy Manual.

3. Total number of customers served:

Projected = The program implementation plans did not identify a projected number of customers served.

Served = 685 audits were completed during the second quarter of 2002.

4. Projected and actual number of units:

Please refer to the program activity tables shown in the corresponding program workbook.

5. Total rebate (\$) paid:

Not applicable to this information program.

**III. Program Implementation Status**

1. Status of program delivery

No change from the program implementation plan submitted to the California Public Utilities Commission (CPUC) on May 20, 2002.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

2. Customer Enrollment

Two blank copies of the nonresidential audits forms were sent to the CPUC's Energy Division.

3. Workbook

Please refer to informational tables shown in the program workbook for details of program expenditures and activities.

4. Training

The program did not sponsor any external training during the quarter.

5. Marketing

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/Each Method</b>
Press Releases - Program Commencement - Business Solutions Outreach Commencement - In-language Business Solutions Outreach Commencement	3	News Departments	1
Business Connection "Special Edition"	1 issue	May Bill Insert To Small Businesses	290,000
Business Energy Guide "Saving Energy & Money" Fact Sheet	5,000	Outreach Events	50-500
Business Solutions Outreach Mailings	290,000	May Mail Drop	290,000
Events with NR Audit	Attendance: 4,875	Outreach Events	38 events attended

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Program Information Available to Customers			by HTR audiences
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The following web addresses provide access to the program's online survey:

Path 1: <http://www.sce.com/sc3/default.htm> - SCE's Web Site Front Page: Path 1 – at screen right in the frame, click on the button “Free Online Energy Use Survey”

<http://www.rebatesandoffers.com/secondary.asp?pgmid=2051> - click on “Take Survey” text or call toll free number to have a printed copy mailed to them.

<http://www.rebatesandoffers.com/> - at the top nav buttons, click on “Guides & Surveys” for dropdown menu, then click on “Business Energy Survey”

<http://www.rebatesandoffers.com/secondary.asp?pgmid=2051> - click on “Take Survey” text or call toll free number to have a printed copy mailed to them. Path 2 – at screen left, in the frame, click on “For your Business”, “Tools and Services”, on the drop down menu click on “Small- to Medium-Sized Customers.”

<http://www.rebatesandoffers.com/secondary.asp?pgmid=2058> - click on “Business Energy Survey” text

<http://www.energyguide.com/energysmartsbe/SBEMasterFrame.asp?bid=sce> - commence the survey.

Path 2: <http://www.sce.com/sc3/default.htm> - in the center screen frame, click on “Business Solutions”

[http://www.sce.com/sc3/010\\_bus\\_sols/default.htm](http://www.sce.com/sc3/010_bus_sols/default.htm) - in the text, near screen bottom, click on “Rebates and Offers” text

<http://www.rebatesandoffers.com/fyb.html> - at screen right in the frame, click on “Tools and Services”

<http://www.rebatesandoffers.com/fybTS.html> - at screen right in the frame, click on Small- to Medium-sized Businesses”

[http://www.rebatesandoffers.com/fyb\\_ts\\_sm\\_index.asp](http://www.rebatesandoffers.com/fyb_ts_sm_index.asp) - click on “Business Energy Survey” text

<http://www.rebatesandoffers.com/secondary.asp?pgmid=2058> - click on “Take the Survey” text.

<http://www.energyguide.com/energysmartsbe/SBEMasterFrame.asp?bid=sce> - commence the survey.

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6. Hard-to-Reach

SCE's hard-to-reach (HTR) target is to conduct 1,800 energy audits for the HTR customers with a business size or geographic barrier as defined in the CPUC's Energy Efficiency Policy Manual. During the second quarter of 2002, SCE conducted 18 HTR audits.

**IV. Program Accomplishments**

The 2002 statewide Nonresidential Energy Audit Program officially began on April 1, 2002 after CPUC approval. As stated in the Program Implementation Plan, the IOUs used various resources and methods to reach the hard-to-reach customer segment in the second quarter. Marketing efforts included a bill insert to small and medium size customers, distribution of materials on IOU incentive and rebate programs, electronic news letters distributed among all customer classes, program information fact sheets, direct mail, promotion of on-line energy audits, phone call referrals to the audit program, and IOU representatives promoting the program.

The development of optional audits (phone, CD-ROM and mail-in) continues and they should be available statewide in the third quarter.

Program results are expected to accelerate during the third quarter due to the phased implementation of the CD ROM, mail-in and phone-in survey tools. In addition, SCE recently completed a request for proposal (RFP) for on-site energy audits and is finalizing negotiations with six on-site energy-use survey (audit) vendors. The contract phase immediately followed an RFP and bid cycle for the work. Once contracts are signed, surveys for hard-to-reach, and other business customers, are expected to increase.

**V. Program Challenges**

No significant problems encountered to date.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

The following list itemizes the various regulatory compliance items issued by the California Public Utilities Commission directly relating to this program.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Decision 02-03-056 -

*“The IOUs should make their on-site audits available to the same set of customers with the same eligibility requirements.” (mimeo, p. 28)*

Response -

The statewide Nonresidential Audit program provides on-site audits to all eligible customer classes.

Decision 02-03-056 -

*“Third, unlike the other IOUs, PG&E described a program component called “How To Do an Energy Audit,” which offers both theoretical and on-site training to qualified personnel of a variety of organizations to enable them to provide comprehensive energy efficiency services.<sup>3</sup> We support such training efforts to the extent that they are not offered through other IOU education and training programs, and require that the other IOUs offer similar training as part of their Nonresidential Energy Audit Programs. The IOUs should provide detailed description of this training component and an itemized budget (out of the total program budget) in their Program Implementation Plans.<sup>4</sup>” [mimeo, p.28]*

Response –

IOUs are now offering energy audit training either as part of the Nonresidential Energy Audit program or, in some cases, this training is offered through the Education and Training Services program.

Decision 02-03-056 -

*“The IOUs should identify certain performance targets that they intend to achieve and track in quarterly reports in their Program Implementation Plans. One performance target could be the number of audits achieved by type of audit and by customer class.” (mimeo, 28)*

Response –

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<sup>3</sup> SoCalGas and SDG&E both indicated that “interested [Community Based Organizations] will be provided the opportunity to gain energy audit training to conduct their own energy audits,” but provided no other details in their proposals.

<sup>4</sup> On January 28, 2002, PG&E provided additional information on its “How To Do An Energy Audit” program component in its response to Energy Division’s data request sent on January 23, 2002. PG&E should reiterate and/or supplement the information provided in its Program Implementation Plans.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

The IOUs have developed their specific performance targets for the Nonresidential Energy Audit program. These targets are included in the program implementation plans filed with the CPUC on May 20, 2002 and are also shown in the corresponding program workbook.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Program Title: **Energy Efficiency Training and Certification for Building Operators**

**I. Program Overview**

This is a statewide training and certification program for operators of medium and large commercial buildings (including governmental and institutional buildings and complexes) that seeks to establish and support a professional credential for building operators in California. Certified operators will have the training and background to identify and implement energy savings opportunities as an integral part of their operations and maintenance activities.

**II. Program Summary**

1. Total program budget = \$500,000

Expenditures to date = \$11,740

5. Total net demand reduction and energy savings:

Categorized as an information program consistent with the California Public Utilities Commission's 2002 Energy Efficiency Policy Manual.

3. Total number of customers served:

Projected: 75

Actual: 0

4. Projected and actual number of units:

Please refer to the program activity tables shown in the corresponding program workbook.

5. Total rebate (\$) paid:

Not applicable to this information program.

**III. Program Implementation Status**

1. Status of program delivery

The Commission approved the training and certification standards for this program on July 2, 2002.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

2. Customer Enrollment  
Not yet developed for this program.
3. Workbook  
Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.
4. Training  
This program did not sponsor any external training during this quarter.
5. Marketing  
This program did not sponsor any external training during this quarter.
6. Hard to Reach  
*This program targets building operators of medium and large commercial facilities and is not designed for the small hard-to-reach business customers. Interested hard-to-reach nonresidential customers may participate in the training program if they have a building operator for their facility.*

**IV. Program Accomplishments**

In Decision 02-03-056 Ordering Paragraph 13, the Commission required the IOUs to develop standard training curricula, testing and other certification standards for the statewide Building Operator Certification program. The proposed standards were developed in consultation with the Energy Division and filed with the Commission on April 22, 2002.

The IOUs developed a request for proposals (RFP) for the purpose of selecting a third party to develop the training, testing and certification program. The RFP was submitted to the Energy Division and released on June 26, 2002. The IOUs are currently in contract negotiations with the selected vendor.

In response to an Energy Division data request, the IOUs revised and submitted the statewide Builder Operator Certification Program Standards to the Commission on June 26, 2002. The CPUC approved these standards on July 2, 2002. The approved standards included the proposed program title of "Energy Efficiency Training and Certification for Building Operators".

**V. Program Challenges**

No significant problems encountered to date.

**VI. Customer Disputes**

None.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

**VII. Compliance Items**

The following list itemizes the various regulatory compliance items issued by the California Public Utilities Commission directly relating to this program.

Decision 02-03-056 states in Ordering Paragraph 13:

*“The IOUs shall jointly develop standard nonresidential building operator certification and training curricula, testing and other certification standards, in consultation with the Energy Division. The IOUs should develop the standard training curricula, testing and other certification standards and submit them for the Commission’s or assigned Commissioner’s approval no later than 30 days after issuance of this decision. The IOUs should be able to roll out their programs within 30 days after the Commission or the assigned Commissioner approves these standards. The Commission will retain ownership of the curricula and other aspects of the training programs the IOUs develop in connections with Builder Certification and Training Programs.”*

Response –

The proposed standards were developed in consultation with the Energy Division and filed with the Commission on April 22, 2002. In response to an Energy Division data request on the April 22, 2002 document, the IOUs revised and submitted the statewide Builder Operator Certification Program Standards to the Commission on June 26, 2002. The CPUC approved these standards on July 2, 2002.

The CPUC requested that “Energy Efficiency” be incorporated into the title of the BOC program. The IOUs submitted a proposed program title of “Energy Efficiency Training and Certification for Building Operators”. The BOC program will be known as “Building Operator Certification – Energy Efficiency Training and Certification for Building Operators”.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Program Title: **Emerging Technologies**

**I. Program Overview**

The statewide Emerging Technologies (ET) program is an information-only program that seeks to accelerate the introduction of energy efficient technologies, applications, and analytical tools that are not widely adopted in California. The program consists of Demonstration & Information Transfer activities and the Emerging Technologies Coordinating Council (ETCC). The Demonstration & Information Transfer portion of the program focuses on near-commercial applications with significant market opportunities, and commercial energy efficient applications with low market penetration. The ETCC is a statewide information exchange and coordination effort between Pacific Gas & Electric (PG&E), Southern California Edison (SCE), Southern California Gas (SoCalGas), San Diego Gas & Electric (SDG&E), and the California Energy Commission's (CEC) Public Interest Energy Research (PIER) program.

**II. Program Summary**

1. Total program budget = \$650,000

Expenditures to date = \$78,066

2. Total net demand reduction and energy savings

Categorized as an information program consistent with the California Public Utilities Commission's 2002 Energy Efficiency Policy Manual.

3. Total number of customers served

The Statewide Emerging Technologies program focuses on the promotion of emerging technologies to all customers.

4. Projected and actual number of units:

Please refer to tables shown in the corresponding program workbook.

5. Total rebate (\$) paid:

Not applicable to this information program.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

**III. Program Implementation Status**

1. Status of program delivery  
There are no changes to the delivery mechanism described in the program implementation plan submitted to the California Public Utilities Commission (CPUC) on May 20, 2002.
2. Customer Enrollment  
The program does not use customer enrollment and rebate application forms. For demonstration projects at customer sites, negotiated contract agreements are used for each project.
6. Workbook  
Please refer to informational tables shown in the corresponding program workbook for details of program expenditures and activities.
4. Training  
The program did not sponsor any external training during the quarter.
5. Marketing  
The program did not produce any new external marketing products during the quarter. The ETCC maintains a website at <http://www.ca-etcc.com> where the statewide ET program meeting minutes and the ET database are available.
6. Hard-to-Reach  
The program does not have specific goals for the hard-to-reach market segments. However, the utilities do seek collaborative opportunities to host appropriate demonstration projects at hard-to-reach customer sites. Examples of such opportunities the utilities are pursuing include the collaborative SoCalGas/SCE's Professional Wet Cleaning project, which typically involves small business owners, and SCE's Habitat for Humanity project, which focuses on affordable residential housing.

**IV. Program Accomplishments**

*ETCC Activities*

The ETCC met twice during the second quarter (May 13 and June 25) to discuss program plans, status of various projects, and identify and initiate updates to the ET database. Both the CEC and the utilities are reviewing the database structure, existing records, and their project portfolios for technologies that should be incorporated into the database list. At the June 25 meeting, the CEC's PIER Buildings team presented on-going projects with near-term technologies that may be ready for utility ET program involvement. Among the items were:

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- Alternatives to Compressor Cooling, PIER Contract No. 500-98-024,
- Power Line Carrier Bi-Level Switch, PIER Contract No. 400-99-012,
- Next Generation Relocatable Classrooms, PIER Contract No. 400-99-012,
- Commercial Kitchen Exhaust Systems, PIER Contract No. 500-98-031,
- Night Ventilation/Demand Ventilation, PIER Contract No. 400-99-011,
- California Kitchen Lighting, PIER Contract No. 400-99-011,
- Integrated Design of Small Commercial HVAC Systems, PIER Contract No. 400-99-013, and
- Market-Optimized Residential Heat Pump Water Heater, PIER Contract No. 500-98-028.

The utilities are reviewing and analyzing the CEC projects and technology-applications for follow-up ETCC activities. In addition, the CEC and the utilities continue to collaborate on issues related to high performance integrated schools associated with PIER Contract No. 400-99-013, projects 2.2 “Daylighting in Schools,” and 2.4 “Healthy Schools: Daylighting, Lighting, and Ventilation.”

SCE is also analyzing the following technology-applications for potential program activities:

- Ultraviolet Air Treatment Systems,
- Selective Coatings for Building Materials, and
- Membrane Filtration Systems.

Lawrence Berkeley National Laboratory (LBNL) demonstrated an innovative, energy efficient table lamp prototype, developed with PIER and U.S. Department of Energy funding as part of PIER Contract 500-97-013, in June 2000. A joint ETCC project to demonstrate and monitor lamp performance and acceptance in hotels and office settings was started as a result. The utilities worked with LBNL and a manufacturer to fabricate the first production run of Berkeley Table Lamps. The utilities have deployed this first generation of table lamps to various customer sites, and LBNL is monitoring the sites and collecting data for analysis.

SCE is working with Occidental College, the South Coast Air Quality Management District, and with SoCalGas to determine the energy impacts of replacing a standard dry cleaning process with a professional wet cleaning process. Up to eight commercial laundries throughout Southern California will be converted from dry-cleaning to wet cleaning equipment by year-end 2002. The majority of dry cleaners in Southern California are ethnic, small commercial operations. The projects will compare cleaning and pressing

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results, environmental impacts, water usage, and source fuel energy consumption.

SCE is field-testing prototypes of an advanced heat pump water heater, as part of PIER Contract 500-98-028 with A.D. Little, to replace electric water heaters in small commercial, office, and residential settings. SCE has selected four sites, and due to the recent merger between A. D. Little and TIAX, SCE is pursuing customer approval of new agreement forms.

*PY2002 Projects*

**Habitat for Humanity**

SCE is analyzing the proposed efficiency measures for the project, including the “Night Breeze” technology from PIER Contract No. 500-98-024. Also, a collaborative relationship with ADM Associates, who are working with Habitat for Humanity on the “Energy Efficient Low-Income Housing” PIER project (Contract No. 400-00-036), was initiated.

In addition, program staff was engaged in the planning and development of seven demonstration projects during the quarter and participation in ETCC activities. Signed customer demonstration projects agreements will be concluded during the third and fourth quarters.

**V. Program Challenges**

No program-specific challenges were encountered during the quarter.

**VI. Customer Disputes**

The program did not encounter any customer disputes during the quarter.

**VII. Compliance Items**

The following list itemizes the various regulatory compliance items issued by the California Public Utilities Commission directly relating to this program.

Decision 02-03-056 –

*“We support these programs and will fund them. However, we will require the IOUs to report on the extent to which funding this Commission awards advances the cause of emerging energy efficient technologies. For each emerging technology set forth on the CEC’s PIER website at <http://www.energy.ca.gov/pier/programs.html>, we will require that the IOUs*

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*describe in their 2002 quarterly reports how PGC funding is moving these technologies to market.” (mimeo, pp. 31-32)*

Response –

This report describes program activities that are helping to move energy efficient emerging technologies to market from both PIER and other sources such as DOE, GTI, ASHRAE, etc.

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**Program Specific Report to June 30, 2002**

**Program Title: Savings By Design**

**I. Program Overview**

The Savings By Design (SBD) program influences nonresidential building owners, tenants, and design teams to exceed current Title 24 standards (or industry standards for processes) by 10 percent or more for their new construction or renovation/remodel projects. SBD provides energy design education, design assistance, and cash incentives for all project types and sizes that meet the program's eligibility. SBD also leverages resources from industry relationships, strategic alliances, and other Public Purpose Programs to accomplish the goals of energy savings, peak demand reductions, and long-term market change.

The program has three elements: the Whole-Building Approach, the Systems Approach, and education and outreach. The core strategy centers on an integrated design approach to optimize energy efficiency, known as the Whole-Building Approach. To include participants who would not normally consider a fully integrated design approach, the Systems Approach provides a simplified, performance-based method, which moves owners and design teams far beyond prescriptive approaches. Finally, program education and outreach strategies, focused on the successful Energy Design Resources model, address market barriers by providing owners and designers with the information, education, and tools to help them make the best possible energy efficiency choices. All three elements support the California Energy Commission's goals for market transition to the 2005 Title 24 code revision cycle.

**II. Program Summary**

1. Total program budget = \$7,674,000  
Expenditures to date = \$ 268,069

2. Total net demand reduction and energy savings

	<b>Net kW</b>	<b>Net kWh</b>	<b>Therms</b>
<b>Projected</b>			
<b>Systems</b>	3,890	16,628,000	0
<b>Whole-Building</b>	3,890	16,628,000	0
<b>Actual</b>			
<b>Systems</b>	0	0	0
<b>Whole-Building</b>	0	0	0
<b>Committed</b>			
<b>Systems</b>	1,800	9,949,000	0
<b>Whole-Building</b>	450	2,019,800	0

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**Program Specific Report to June 30, 2002**

3. Total number of customers served:  
Projected (Annual): Not specified in the Implementation Plan  
Actual: 217 qualified leads investigated, with customers contacted and program information provided. Leads entered into tracking system as potential projects.
4. Projected and actual number of units:  
Please refer to the program activity tables shown in the corresponding program workbook.
5. Total incentives (\$) paid = \$ 0.00  
Total incentives (\$) committed = \$ 766,537

**III. Program Implementation Status**

The Savings By Design program was rolled out to the public on April 1, 2002. For 2002, the program has continued, and expanded, successful marketing and outreach activities delineated in the program Implementation Plan. Market acceptance for the program remains relatively strong despite a weakening economy in the nonresidential construction sector. The adoption at SCE of the SBD process component for the industrial and agricultural markets has spurred serious interest in the program within these market sectors.

1. Status of program delivery

Program Implementation Plan process and operational guidelines are being followed. Per statewide agreement, an annual per customer/per utility cap of \$600,000 was added to program offerings.

In order to maintain the tightest statewide program consistency, SCE integrated the project processing and documentation routine used by Pacific Gas and Electric and San Diego Gas and Electric Company.

2. Customer Enrollment

Copies of appropriate applications were sent to the Commission's Energy Division.

3. Workbook

Please refer to workbook for details of program expenditures and program activities.

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**4. Training**

Attendees	Category	Date	Location	Title	Delivery Method
9	Architectural/ Engineering	6/21/02	Irwindale, SCE's Customer Technology Application Center	eQuest: Calculation tool training	Half Day Classroom Presentation

**5. Marketing**

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/Each Method</b>
<b>Statewide Efforts</b>	<i>Total Ordered</i>		<i>Delivered YTD</i>
SBD Brochure	2000	<ul style="list-style-type: none"> <li>• Hand delivery</li> <li>• SCE's Customer Technology Application Center, Irwindale</li> <li>• SCE's Agricultural Technology Application Center, Tulare</li> </ul>	Delivered as needed
Brochure Inserts: - Whole-Building Insert - Design Team Insert - Process Insert	2000 each	Inserted into Brochure	
SBD Energy Efficiency Integration Award Call for Entries	10,000	Statewide Mailing	7,900
<b><u>SCE-Specific Efforts</u></b>			
One-Page Flyers	Down loadable from SCE's Website	As needed	--
Energy Design Assistance – Newsletter	2,500	Email	2,500

- Savings By Design maintains a statewide web site at [www.savingsbydesign.com](http://www.savingsbydesign.com) that provides comprehensive program information, utility contacts, and a downloadable Participant Handbook outlining program policies and procedures as well as application guidelines.
- Energy Design Resources, the educational and academic arm of Savings By Design, maintains a comprehensive library of information and resources at [www.energydesignresources.com](http://www.energydesignresources.com), including electronic newsletters for the design community, freeware for design and financial analysis, and a series of AIA accredited online courses.

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**Program Specific Report to June 30, 2002**

- [www.sce.com](http://www.sce.com) features pages describing Savings By Design that direct customers to program contacts and provide external links to the Statewide web site for more information.

**6. Hard to Reach**

Savings By Design targets geographically hard-to-reach customers. The program will pursue the goal of increasing the percentage of participating projects from geographically hard-to-reach customers by 25% over PY 2001 results.

SCE's Savings By Design program adopted a conservative definition of a hard-to-reach customer to remain consistent with the Commission's intent, as defined in the Energy Policy Manual and with other SCE energy efficiency programs. Of the projects committed to date, SCE has attained 24% of its projected goal in increasing its effort to reach this customer classification.

**IV. Program Accomplishments**

- AIACC – The statewide Savings By Design utilities have continued to work with the American Institute of Architects, California Council to co-sponsor the Savings By Design Energy Efficiency Integration Awards, which promote energy efficiency as a primary consideration in outstanding design.

**V. Program Challenges**

No significant problems encountered to date.

**VI. Customer Disputes**

None

**VII. Compliance Items**

The following list itemizes the various regulatory compliance items issued by the California Public Utilities Commission directly relating to this program.

Decision 02-03-056, Ordering Paragraph 14, states:

*“The IOUs shall reserve 50% of their Savings by Design direct implementation funds for projects that use a whole-building approach.”*

SCE has budgeted 50% of the direct implementation funds for projects that are Whole-Building Approach. As of June 30, 2002, 37% of committed funding was reserved under the Whole-Building Approach.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Program Title: **Energy Efficiency Education And Training Program**

**I. Program Overview**

The statewide Energy Efficiency Education and Training program is offered in the service territories of Pacific Gas & Electric (PG&E), Southern California Edison (SCE), San Diego Gas & Electric (SDG&E), and Southern California Gas (SoCalGas). Overall, the program promotes energy efficiency to a variety of customer segments through energy centers (physical and virtual) and other informational programs.

The educational and information efforts of the energy centers and of SDG&E cover a broad spectrum of market actors including consumers, midstream actors such as design, engineering and contracting communities, and upstream market actors. The motivations to make use of energy center services encompass reducing operational costs, increasing productivity and profitability, and designing more efficient new buildings.

**II. Program Summary**

1. Total program budget = \$3,813,000

Expenditures (includes program commitments) to date = \$811,462

2. Total net demand reduction and energy savings:

Categorized as an information program consistent with the California Public Utilities Commission's 2002 Energy Efficiency Policy Manual.

3. Total number of customers served:

Projected: 4,100

Actual: 2,435

4. Projected and actual number of units:

Please refer to the program activity tables shown in the corresponding program workbook.

5. Total rebate (\$) paid:

Not applicable to this information program.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

**III. Program Implementation Status**

1. Status of program delivery

No change from the program implementation plan submitted to the California Public Utilities Commission (CPUC) on May 20, 2002.

2. Customer Enrollment

Two blank copies of each customer registration form used by customers attending CTAC and AGTAC seminars and workshops were sent to the Commission's Energy Division.

3. Workbook

Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.

4. Training

SCE conducted a number of customer training workshops through its energy centers, which are fully described in the corresponding program activities workbook.

5. Marketing

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/Each Method</b>
Advanced Food Service Refrigeration Flyer	2,000	Direct Mail	1,231
Advanced Food Service Refrigeration Flyer	----	Hand Deliver	769
Advanced Food Service Refrigeration Flyer	----	Newsletter	-----
Advanced Food Service Refrigeration Flyer	----	<a href="http://www.calrest.org">Website (http://www.calrest.org)</a>	----

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Advanced Lighting Technologies Flyer	1	E-Mail	----
Basic Heating, Ventilation and Air Conditioning Flyer	1	Newsletter	----
Commerical and Industrial Lighting Flyer	1	Newsletter	----
CTAC Quarterly Calendar	28,436	Direct Mail	23,555
CTAC Quarterly Calendar	----	Hand Deliver	4,881
CTAC Quarterly Calendar	----	Website ( <a href="http://www.sce.com/ctac">http://www.sce.com/ctac</a> (CTAC main page))	----
CTAC Website	1	Website ( <a href="http://www.sce.com/sc3/002_save_energy/002f_ctac/002f3_work_classes/002f3d_work_classes_date.htm">http://www.sce.com/sc3/002_save_energy/002f_ctac/002f3_work_classes/002f3d_work_classes_date.htm</a> (view classes by date); <a href="http://www.sce.com/sc3/002_save_energy/002f_ctac/002f3_work_classes/002f3e_work_classes_name.htm">http://www.sce.com/sc3/002_save_energy/002f_ctac/002f3_work_classes/002f3e_work_classes_name.htm</a> (view classes by name); <a href="http://www.sce.com/sc3/002_save_energy/002f_ctac/002f3_work_classes/002f3f_work_classes_category.htm">http://www.sce.com/sc3/002_save_energy/002f_ctac/002f3_work_classes/002f3f_work_classes_category.htm</a> (view classes by category); <a href="http://www.sce.com/sc3/002_save_energy/002f_ctac/002f3_work_classes/002f3g_course_desc.htm">http://www.sce.com/sc3/002_save_energy/002f_ctac/002f3_work_classes/002f3g_course_desc.htm</a> (class description page))	----

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Energy Efficiency Vendor Rebate Flyer	270	Direct Mail	270
Energy Management Systems, Compressed Air, and Owning and Operating an Efficient Cooling Tower Flyer	2,700	Direct Mail	2,700
Express Efficiency Vendor Kick Off and Fair Flyer	270	Direct Mail	270
Faith Based Organization Program Flyer	1	Newsletter	-----
HiBay Lighting Flyer	2,800	Direct Mail	2,684
HiBay Lighting Flyer	----	Display	116
Hibay Lighting Flyer	1	<a href="http://www.occe.ou.edu/aia/cgi-bin/Ads/AIAsStart.pl">Website (http://www.occe.ou.edu/aia/cgi-bin/Ads/AIAsStart.pl)</a>	----
High Performance Commerical Building Facades Roundtable Flyer	1	E-Mail	----

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

High Performance Commercial Building Facades Workshop Flyer	330	Direct Mail	300
High Performance Commercial Building Facades Workshop Flyer	1	Hand Deliver	30
Irwindale Chamber of Commerce Newsletter	1	Newsletter	1
Lighting Controls Flyer	1	E-Mail	----
Lighting for Offices and Schools Flyer	1	E-Mail	----
Lighting for Offices and Schools Flyer	1	<a href="http://www.occe.ou.edu/aia/cgi-bin/Ads/AIAsStart.pl">Website (http://www.occe.ou.edu/aia/cgi-bin/Ads/AIAsStart.pl)</a>	----
Pumping System Assessment Workshop Flyer	350	Display	50
Pumping System Assessment Workshop Flyer	----	Hand Deliver	300
Refrigeration Vendor Event Flyer	610	Direct Mail	610

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Schools Energy Efficiency Workshop Flyer	1	E-Mail	----
AgTAC Quarterly	9,000	Direct mail	8,700
AgTAC Quarterly	----	Hand deliver	250
AgTAC Quarterly	----	Display	50
AgTAC Quarterly		Personal e-mail addresses	264
Sce.com/agtac	----	Website posting	----
Energyefficiencycenter.com	----	Website posting	----
Non-profit Energy Forum	150	Direct mail	150
Irrigation Workshop Flyer	50	Display	50

**6. Hard to Reach**

During the 2002 program year, each of the utilities also committed to develop methods of tracking the participation of the Hard-to-Reach (HTR) market group in its education programs, based on the definition provided in the Energy Efficiency Policy Manual. SCE proposed the following HTR target:

- SCE's Energy Efficiency Education and Training program will target 45 energy efficiency events to HTR customers.

*Through June 2002, SCE has provided 15 events for the hard-to-reach market.*

**IV. Program Accomplishments**

In 2002, the program continues to offer seminars/workshops/field services focused on promoting energy efficiency to customers. In support of this activity, SCE proposed the following target:

- SCE's Energy Efficiency Education and Training program will conduct **150** seminars/workshops during 2002 in support of energy efficiency promotion.

Through June 2002, SCE has provided 49 classes.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

**V. Program Challenges**

No significant problems encountered to date.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

There are no program specific compliance items issued by the California Public Utilities Commission regarding this program.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Program Title: **Codes and Standards Advocacy**

**I. Program Overview**

This statewide Codes and Standards (C&S) Advocacy program promotes upgrades and enhancements in energy efficiency standards and codes. Codes and Standards Enhancement (CASE) studies are performed for promising design practices and technologies. The study results are presented to standards and code-setting bodies to encourage adoption of energy efficiency measures.

**II. Program Summary**

1. Total program budget = \$887,500

Expenditures to date = \$28,463

2. Total net demand reduction and energy savings:

Categorized as an information program consistent with the California Public Utilities Commission's (CPUC) 2002 Energy Efficiency Policy Manual.

3. Total number of customers served:

The Statewide Codes and Standards program focuses on upgrades and enhancements in the energy efficiency standards and codes thereby benefiting all Californians.

4. Projected and actual number of units:

Please refer to tables shown in the corresponding program workbook.

5. Total rebate (\$) paid:

Not applicable to this information program.

**III. Program Implementation Status**

1. Status of program delivery

No change from the program implementation plan submitted to the California Public Utilities Commission (CPUC) on May 20, 2002.

2. Customer Enrollment

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Due to the nature of the program there are no customer enrollment forms.

3. Workbook

Please refer to informational tables shown in the program workbook for details of program expenditures and activities.

4. Training

Customer training is typically not conducted due to the nature of the program. However, there are numerous workshops associated with codes and standards advocacy. These workshops are listed under the Program Accomplishments section shown below.

5. Marketing

The program did not conduct any marketing activities in the second quarter of 2002.

6. Hard-to-Reach

Codes and Standards activities support hard-to-reach market segments by advocating cost effective code enhancements that promote energy efficiency for all building types and appliances included in the California standards.

**IV. Program Accomplishments**

- Participated in CEC public workshops on dates listed below. Performed advocacy for code enhancements in the subject area addressed at each workshop.

4/02/02	Time Dependent Valuation Life (TDV) Cycle Costing
4/22/02	Nonresidential Acceptance Requirements
4/23/02	Residential and Nonresidential Building Standards
5/30/02	Residential and Nonresidential Building Standards
6/18/02	Outdoor Lighting Standards

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

**Second Quarter Activities**

- Attended and participated in meetings of organizations that impact California building and appliance standards, including American Society of Heating, Refrigerating, and Air-Conditioning Engineers (ASHRAE), Cool Roof Rating Council (CRRC), and the National Fenestration Rating Council (NFRC). Participation included involvement in committee meetings on issues that may impact California's energy codes and standards.
- The program team held meetings and teleconferences during the second quarter to coordinate activities and advocacy for the CEC's 2005 Building Energy Efficiency Standards workshops and the CEC's Existing Building Energy Efficiency Opportunity Study (Assembly Bill 549) report.
- SCE's Codes and Standards program staff was engaged in the planning and development of five CASE initiatives during the quarter. Program staff anticipates that signed CASE initiative agreement forms will be completed during the third and fourth quarters of 2002.

**V. Program Challenges**

No significant problems encountered to date.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

The following list itemizes the various regulatory compliance items issued by the California Public Utilities Commission directly relating to this program.

Decision 02-03-056 -

*"We [CPUC] are especially interested in seeing improvement in the area of energy efficiency standards for residential retrofits, where we believe most of the new savings will come."* (mimeo, p. 43)

Response -

In response to the CPUC's special interest in seeing improvement in the area of energy efficiency standards for residential retrofits, the C&S program supported building standards for residential alterations, and are discussing support for the AB-549 report with the California Energy Commission.

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Program Title: **Statewide Upstream Residential Lighting**

**I. Program Overview**

This Statewide program solicits proposals from interested statewide retailers who can offer point-of-sale discounts for Energy Star® lighting products and assist with meeting hard-to-reach goals. The retailers will be reimbursed for the discounts provided to consumers during the promotion period by providing the sales information for the promotion period to the investor-owned utilities (IOUs). The program also solicits proposals from manufacturers to provide Energy Star® lighting products to retailers. The manufacturers provide buy-downs to retailers.

**II. Program Summary**

1. Total program budget = \$1,999,500

Expenditures (includes program commitments) to date = \$66,388

3. Total net demand reduction and energy savings:

Due to the seasonality of this program, demand reduction and energy savings are planned for the third and fourth quarters.

	Net kW*	Net kWh*
<b>Projected</b>	1,950	25,626,000
<b>Actual</b>	0	0
<b>Committed</b>	0	0
<b>Total Recorded</b>	0	0

\*Note: The projected net energy savings and demand reductions differ from the CPUC targets for this program. It appears that a discrepancy exists in the formulation of the CPUC's current energy and demand savings target.

3. Total number of customers served:

Projected: The program implementation plans did not identify a projected number of customers served.

Actual: 0

4. Projected and actual number of units:

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**Program Specific Report: April 1, 2002 thru June 30, 2002**

Please refer to the program activity tables in the corresponding program workbook.

5. Total rebate (\$) paid = \$0.

**III. Program Implementation Status**

1. Status of program delivery

No change from the program implementation plan submitted to the California Public Utilities Commission (CPUC) on May 20, 2002.

2. Customer Enrollment

Two blank copies of the program's ceiling fan application forms were sent to the Commission's Energy Division.

5. Workbook

Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.

4. Training

The program did not sponsor any training during the quarter.

10. Marketing

Due to the seasonality of the program implementation no marketing activities occurred during the second quarter of 2002.

6. Hard to Reach

The Residential Upstream Lighting program has goals to spend 15% of the direct implementation budget on geographic locations outside urban centers. Additionally, the program is challenged with ensuring that at least 10% of the program's direct implementation budget is spent through grocery and drug stores.

Strategies to accomplish these targets are underway via contract negotiations with retailers and manufacturers.

**IV. Program Accomplishments**

The optimal promotional period was determined to be the fall season to more closely coincide with customer's traditional attention to lighting products and Energy Star's Change a Light campaign. Therefore, program activity was limited to planning (including promotion materials) and retailer discussions.

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The IOUs are on schedule to make discounted products available to consumers in September 2002.

**V. Program Challenges**

No significant problems encountered to date.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

The following list itemizes the various regulatory compliance items issued by the California Public Utilities Commission directly relating to this program.

Decision 02-03-056, Ordering Paragraph No. 7 –

*“At least 15% of the statewide Upstream Residential Lighting Program rebate dollars shall be reserved for rural areas, in order to enhance service to hard-to-reach customers.”*

Response –

SCE has formalized the 15% target under SCE’s hard-to-reach activities contained within its program incentive budget filed with the Commission on May 20, 2002. The progress towards this goal is identified in the hard-to-reach section above.

Decision 02-03-056 -

*“In addition, we will require that 10% of the rebate funds also be reserved for redemption through purchases from new delivery channels of grocery and drug stores.”* (mimeo, p.45)

Response -

SCE has formalized the 10% target under SCE’s hard-to-reach activities contained within its program incentive budget filed with the Commission on May 20, 2002. The progress towards this goal is identified in the hard-to-reach section above.

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**Introduction**

In response to the delayed approval of the 2002 energy efficiency programs, the California Public Utilities Commission (CPUC) authorized Southern California Edison (SCE) to continue delivery of its existing local programs during April and May 2002. This period, referred to as the bridge period, allowed SCE to partially fund some of the existing local energy efficiency programs until the CPUC approved the 2002 local energy efficiency programs. Due to the limited allotment of program funds many of the activities focused on program planning and design for 2002. The following provides a summary of program activities during the bridge period.

**Residential Program Area**

Program Name: **Residential Torchiere Exchange**

**Program Description**

The Residential Torchiere Exchange Program provides a one-for-one exchange of a halogen torchiere for a compact fluorescent torchiere. The program builds on the highly successful 2001 residential torchiere exchange program. The program relies on retailer and community events to target the mass residential market and to the hard-to-reach sector, i.e., moderate income, renters, rural, ethnic and geographic location.

**Accomplishments**

The first event was held April 27, 2002 at the All American Home Center in Downey. A total of 564 torchieres were exchanged. The second event was held May 18, 2002 at the Howard's Appliances in La Habra. A total of 110 torchieres were exchanged. The third event was held on June 15, 2002 at the Small Business Solutions event in Garden Grove. A total of 1,597 torchieres were exchanged at these three events resulting in 353 MWh of annualized energy savings and 0.3 MW of demand reduction.

Program Name: **Residential In-home Audits**

**Program Description**

The In-Home Energy Survey program provides residential customers, particularly hard-to-reach customers who do not respond to Internet and mail options, with a more personalized, face-to-face energy survey option. Maintaining this option is particularly important in 2002, with customers facing substantially higher rates than they did a year ago, and after they have been alerted by the 2001 mass media campaigns and press coverage about the need for and general possibilities for achieving significant energy savings.

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Accomplishments

For the period April – May 2002, there were 458 In-Home Energy Surveys completed using bridge funding and an additional 146 In-Home Energy Surveys completed for the hard-to-reach Latino customers using SERP funding. In total, over 600 In-Home Energy Surveys were completed, of which approximately 25% were provided to the hard-to-reach Latino customers. This resulted in total annual net energy savings of 261,351 kWh and 56 kW of demand reduction.

**Program Name: Information Mobile Unit**

**Program Description**

The program seeks to educate residential and nonresidential customers about options available for energy conservation, the adoption of energy efficient technologies in their homes and businesses, tips on how to lower their electric bills, and promotional materials that direct them to SCE's rebate and incentive programs. This is accomplished in four ways: publication and distribution of energy guides and related consumer information, direct access to energy efficiency information on the Internet, one-on-one consumer education and information distribution via SCE's residential and nonresidential Mobile Education Units, and on-site information distribution utilizing SCE's Energy Efficiency Information Kiosks.

Accomplishments

During the bridge period, SCE continued the deployment of the very successful information mobile unit. The unit visited 29 different locations. In these visits, SCE distributed over four thousand residential energy guides, made over 10,000 customer contacts, and spent a total of 21 days in areas that were predominantly non-English (i.e., Spanish, Asian) speaking communities. The small business mobile information unit was also deployed on four occasions during this period, two of which were in similar hard-to-reach communities.

**Nonresidential Program Area**

**Program Name: Small Express Hard-to-Reach**

**Program Description**

This program will provide low cost and no cost energy efficient equipment to the very small business customers with a special focus on those economically disadvantaged businesses. The primary objective of this program is to encourage the very small business customers to achieve long-term annual energy savings and peak demand reductions through the installation of energy efficient equipment retrofits.

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Accomplishments

The expenses were focused on planning and involved the following activities: 1) statewide working group coordination and relations; 2) Small hard-to-reach (HTR) on-site survey tool customization; 3) on-site survey data collection form redesign and reconstructed the customer report; 4) identified HTR customer market segments, and 5) commenced initial request for proposal design and scope of work to solicit vendor support.

Program Name: **Small/Medium In-business Audits**

Program Description

The program targets the hard-to-reach and underserved nonresidential customers in the small and very small categories. These customers can receive energy surveys that result in recommendations for energy-saving hardware and operational changes. SCE will offer onsite energy surveys, sometimes called energy audits, to targeted nonresidential customers at no direct cost. Energy surveys themselves are a powerful portal to energy efficiency solutions for all customer classes including the small business customer.

Accomplishments

Activities during the bridging period included the following activities: 1) statewide working group coordination and relations; 2) conducted field work including customer group interviews, economic development agency coordination, energy efficiency services contractor/ vendor search, nomination, and qualification; 3) identified target geographical customer market segments; 4) modified on-site survey tool review including reworking equipment inventory data collection forms, the formulas and calculations, where appropriate, updated measure assumption baselines.

Program Name: **Pump Tests & Hydraulic Services**

Program Description

Southern California Edison's Pump Test and Hydraulic Services program delivers high quality pump testing services and quality technical information. The program provides the customer with the information they need and pump testing data to implement energy efficiency measures for their hydraulic application.

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Accomplishments

During the interim bridge period, SCE hydraulic test specialists tested over 600 pumps. This resulted in over 900 MWh of annualized net energy savings and 0.3 MW of net peak demand reduction.

**Crosscutting Program Area**

Program Name: **Emerging Technologies**

Program Description

The Emerging Technologies Program investigates energy efficient emerging technology applications that are custom tailored to the needs and requirements of residential and nonresidential customers in Southern California. The program introduces new energy efficient applications to both the residential and nonresidential market segments. Through demonstration projects at customer sites, technologies are proved for specific applications, and their design and performance information are disseminated.

**Accomplishments**

Program staff worked to secure demonstration project agreements with both the Orange County and Long Beach chapters of Habitat for Humanity to demonstrate a combination of standard efficiency measures and emerging technologies in two new affordable housing projects. The projects, to be built with volunteer labor and homeowner "sweat" equity, will consist of four homes in Westminster and six in Long Beach. Both cities are located in Southern California's coastal climate zone (CTZ 6). A daylong design workshop was conducted at SCE's CTAC facility to review each chapter's architectural plans and to develop a list of potential measures. SCE will analyze the homes using the DOE-2 building energy-use simulation software to arrive at a final list of recommended measures. Once built and occupied, the homes will be monitored to determine the actual energy savings.

Program Name: **Local Government Initiative**

Program Description

Southern California Edison's Local Government Initiative educates and informs community leaders, local government planners, building officials, builders, building owners, small business owners, and consumers about the economic benefits of energy efficiency in the areas of residential and nonresidential new construction, as well as small business.

Accomplishments

Planning for 2002 got underway in a meeting held to discuss the melding of CheckPoint (Nonresidential New Construction), CEEP (Residential New Construction), and Express

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Efficiency (Small Commercial Retrofit) into a local government offering targeted at local building officials.

**Program Name: Codes & Standards**

**Program Description**

This crosscutting program assists in the process to bring about cost-effective upgrades to the State's energy related codes and standards that will benefit California as a whole.

The California Energy Commission (CEC) has begun the 2003/2005 revision process for both the Title 24 and Title 20 energy standards. This program supports the CEC 2003/2005 standard revision process for both California Title-20 and Title 24. Program activities include:

- Working with manufacturers and industry to develop test procedures for equipment certification, and
- Providing guidance through educational efforts targeted towards local code officials, contractors, consultants, and other groups that are part of the implementation, administration, and enforcement of both new and existing energy codes.

**Accomplishments**

Southern California Edison continued its investigations into a test procedure and potential rating criterion for packaged air-conditioning equipment efficiencies at high ambient conditions. Our work during this period included completing performance tests of a standard efficiency unit. Additional tests on high efficiency units will be completed and compared against the standard unit results to build a case for a new rating criterion.

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**Table 1.1  
Southern California Edison  
Program Summary - April, May  
PY2002**

Program	2002 Authorized Budget (\$000)	2002 YTD Expenditures		2002 YTD Total Expenditures Actual + Committed (\$000)
		Actual thru 05/31/2002 (\$000)	Commitments thru 05/31/2002 (\$000)	
Residential In-home Audits	\$ 156.000	\$ 31.362	\$ -	\$ 31.362
School Based Audits [1]	8.000	-	-	-
Torcheire Turn-in	100.000	6.000	71.692	77.692
Small Express Hard-to-Reach	9.000	8.785	-	8.785
Small Business Energy Audits	41.000	40.241	-	40.241
Agricultural Pump Systems	338.300	338.276	-	338.276
Emerging Technologies	19.000	11.401	-	11.401
Local Government Initiatives	4.000	3.909	-	3.909
Codes and Standards	50.000	10.733	-	10.733
Information Mobile Unit	180.000	151.372	-	151.372
<b>TOTALS</b>	<b>\$ 905.300</b>	<b>\$ 570.717</b>	<b>\$ 71.692</b>	<b>\$ 642.409</b>

[1] - program was not implemented due to limited time relative to the school year calendar cycle.

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**Table 2.1**  
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Program Summary - April, May  
PY2002

Program	2002 YTD MWh Savings		2002 YTD Total MWh Actual + Committed	2002 YTD MW Savings		2002 YTD Total MW Actual + Committed
	Actual MWh thru 05/31/2002	Commitments MWh thru 05/31/2002		Actual MW thru 05/31/2002	Commitments MW thru 05/31/2002	
Residential In-home Audits	261	-	261	0.560	-	0.560
School Based Audits [1]	-	-	-	-	-	-
Torchère Turn-in	353	-	353	0.280	-	0.280
Small Express Hard-to-Reach	-	-	-	-	-	-
Small Business Energy Audits	-	-	-	-	-	-
Agricultural Pump Systems	920	-	920	0.280	-	0.280
Emerging Technologies	-	-	-	-	-	-
Local Government Initiatives	-	-	-	-	-	-
Codes and Standards	-	-	-	-	-	-
Information Mobile Unit	-	-	-	-	-	-
<b>TOTALS</b>	<b>1,273</b>	<b>-</b>	<b>1,273</b>	<b>0.560</b>	<b>-</b>	<b>0.560</b>

[1] - program was not implemented due to limited time relative to the school year calendar cycle.