



SOUTHERN CALIFORNIA  
**EDISON**

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

November 2002

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

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Program Title: **Residential Appliance Recycling Program**

**I. Program Overview**

The 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 = \$4,710,000\*

Expenditures to date (includes program commitments) = \$3,301,961

2. Total net demand reduction and energy savings:

	<b>Net kW*</b>	<b>Net kWh*</b>	<b>Units*</b>
<b>Projected</b>	6,021	37,609,000	21,825
<b>Actual</b>	5,316	33,003,000	19,103
<b>Committed</b>	514	1,804,400	813
<b>Total Recorded</b>	5,528	34,388,000	19,916

\*In Advice 1650-E, SCE requested to shift \$0.710 million to this program. The additional funding allows approximately 4,512 additional units to be recycled with an additional energy and demand savings of approximately 7,782,115 kWh and 1,192 kW.

3. Total number of customers served:

Projected: 21,500

Actual: 18,700

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:  
Paid = \$2,864,489, Committed = \$207,681

**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>
Refrigerator/Freezer Recycling Bill Insert Bi-lingual (English/Spanish)	570,000	Bill Insert: Direct Mail	Varies
Press Release		Mass Market Media	Press
Penny Saver Ad	2,195,000 Circulation	Print Advertisement	3 weeks in 240 HTR Zip Codes

Other Activities –

- Efforts continued to be coordinated utilizing the *FlexYourPower* campaign to leverage program offerings, which took place through distributing their advertisement with all refrigerator pick-ups.

6. Hard to Reach  
In the third quarter of 2002, 57% of the units collected in SCE's service territory were from hard-to-reach geographic areas defined as rural, moderate

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income and/or multifamily. SCE's 2002 revised goal is to have 57% of the units collected from this customer segment.

**IV. Program Accomplishments**

- In August, SCE projected the program would exhaust its funds by the end of the third quarter or early in the fourth quarter thereby requiring SCE to close the program. To alleviate this problem, SCE sought to move additional funds from unspent first and second quarter 2002 program funds to the Appliance Recycling program (Advice Letter 1650-E). On September 29, 2002 the CPUC approved SCE's request to shift \$710,000 into the program. It is estimated that the increased funding should result in a collection of more than 4,500 units during the fourth quarter.
- The hard-to-reach component of the marketing plan was implemented in the third quarter, increasing the participation of hard-to-reach customers by 3 percent over 2001 levels.
- Due to high customer demand and near depletion of funding for the \$35 cash incentive option, during the latter part of the third quarter customers were only offered the CFL incentive to ensure that the program remained open.

**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 -

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

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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 (includes program commitments) = \$2,904,008

2. Total net demand reduction and energy savings

	<b>Net kW</b>	<b>Net kWh</b>
<b>Projected</b>	6,770	19,039,000
<b>Actual</b>	4,423	6,246,943
<b>Committed</b>	1,163	1,643,642
<b>Total Recorded</b>	5,586	7,890,585

3. Total number of customers served:  
Projected: Projection of the number of customers to be served was not provided in the implementation plan.  
Actual: 17,503 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:  
Paid = \$1,580,734, Committed = \$419,873

**III. Program Implementation Status**

1. Status of program delivery  
Statewide utilities implemented a contractor bonus program effective September 1, 2002, for the installation of qualified pool pumps and motors, which encourages contractors to actively solicit an increase in customer participation. Eligible contractors can receive an additional \$100 for qualified installations.

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2. Customer Enrollment

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 Energy Star® in the conduct of an Appliance and HVAC Seminar in the month of September. The IOU's discussed rebate programs available statewide and facilitated an information exchange with manufacturers and retailers about the impact of rebate programs on their businesses. We specifically sought feedback from the program's participants concerning the 2002 rebate programs and intend to incorporate that input into the 2003 program design.

6. Marketing

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/Each Method</b>
Applications	9,000	Mail	26,334
Programmable Thermostat Flyer	3.9 Million	Bill Insert	7.8 Million
Save Money/Save Energy Self Selection Tool	10,000	Direct Contact	10,000
Residential Energy Guide	30,600	Mail	30,600
Shared Mail re: Pool Pumps and Programmable Thermostats	489,000	Mail	489,000
Pool Pump Brochure/Application	100,000	Mail	100,000
Outbound Calling – Pool Pumps	3,000	Phone	3,000
Pool Pump Incentive	400	Mail	400



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SPIFF			
Shared Mail re: Programmable Thermostats	1,500,000	Mail	1,500,000

6. Hard-to-Reach

For the third quarter of 2002, the Single Family Rebate program received 42% of program applications from HTR areas. This surpasses our goal of 34%.

**IV. Program Accomplishments**

The statewide utilities have continued to work together to improve program performance. For SCE, the program has been very popular with customers. SCE expects by the beginning of the final quarter of 2002, SCE will have exceeded goal for programmable thermostats, advanced whole house evaporative coolers, energy efficient windows, and room air conditioners. Specific activities completed during the third quarter include:

- Continued making enhancements/improvements to the rebate processing systems to reduce customer wait time and increase customer response efficiency.
- Initiated several marketing campaigns to increase the level of participation in the 2002 program.
- Continued coordination of customer energy efficiency messages with Flex Your Power and Univision.
- Conducted presentation to audience of manufacturers and retailers at the Energy Star<sup>®</sup> Appliance and HVAC seminar on the IOU's rebate program plans for 2003. Solicited feedback to improve programs for 2003.
- Developed a statewide rebate program plan for 2003, which includes those minor modifications that will make the program more effective.

**V. Program Challenges**

Customer interest in purchasing energy-efficient equipment and products has diminished due to the reduced focus on an energy crisis. Thus customer participation in 2002 has been below expectations. To increase the level of participation in this program, SCE has initiated several marketing campaigns:

- 100,000 mailings to owners of pools greater than five years old
- Outbound calling to pool owners
- 489,000 direct mail pieces to customers advocating the installation of programmable thermostats and pool pumps

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- Bill insert to 3.9 million customers concerning the advantages of programmable thermostats
- 1.5 million direct mail pieces advocating installation of programmable thermostats
- Planned marketing efforts with Home Depot and Lowe's designed to increase customer participation.
- Offered a \$100 incentive to participating pool contractors and retailers.

**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: **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 to date (includes program commitments) = \$970,641

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>	142	1,688,000
<b>Committed</b>	6	185,000
<b>Total Recorded</b>	148	1,874,000

3. Total number of customers served:

Projected: No projection included in the program implementation plan

Actual: 178 applications

4. Projected and actual number of units:

Please refer to program activity tables in corresponding program workbook.

5. Total rebate (\$) paid

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Paid = \$770,578, Committed = \$57,960

**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.
- Exterior Light Fixtures (Porch Lights): fully subscribed (7,500 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.

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>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"	1	Monthly Periodical published by Apartment Association of California Southern Cities	2,500 Multifamily Property Owners/Managers and interested 3 <sup>rd</sup>

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Rebates”, Official California Apartment Journal, June 2002			parties.
Multifamily Energy Efficiency Rebate Program Fact Sheet	10,000	Various methods: Trade Shows, Call Centers, Public Relations, and Other SCE Internal Leveraging	2,000 Multifamily Property Owners/Managers and interested 3 <sup>rd</sup> parties.
Multifamily Energy Efficiency Rebate Program Brochure	20,000	Various methods: Trade Shows, Call Centers, Public Relations, and Other SCE Internal Leveraging	1,200 Multifamily Property Owners/Managers and interested 3 <sup>rd</sup> parties.
Bill Message	1	Billing statement message on September customer bills	9,000 multifamily owner/manager customer accounts

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

During the third quarter of 2002, approximately 72% of the Multifamily Rebate program applications came from hard-to-reach customer segments.

**IV. Program Accomplishments**

Statewide third quarter activities include:

- Participated as exhibitor at three apartment association trade shows in September: Apartment Association of California Southern Cities, Apartment Association of Greater Inland Empire, Southern California Association for Non-Profit Housing. Total attendance of these shows exceeded 30,000.
- Conducted halogen torchiere exchange in ethnic community; exchanging over 80 halogen torchieres in predominantly Spanish speaking community.
- Established walk-in halogen torchiere exchange program with fluorescent torchiere manufacturer for ongoing customer exchanges.

**V. Program Challenges**

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The Statewide Multifamily Program is a new energy efficiency program initiated for PY2002 targeted to the multifamily property owner and manager market. Establishing a new program in a previously dormant market poses new hurdles to overcome. Program participation levels have been challenged in 2002 as the Statewide Multifamily Program offerings begin to be integrated into this complex market.

Historically, the property owner/manager market has been resistant to any participation in energy efficiency efforts, particularly where any out-of-pocket expense is incurred for purchase and installation. During program planning, the four IOUs sought to overcome this hurdle by setting the rebates of some measures at sufficient levels to cover most, if not all, of the purchase and installation costs. As the Statewide Multifamily Program progresses, this approach has been validated by those measures being sold out in a relatively quick manner as opposed to very low participation levels for other measures requiring customer to contribute financially toward purchase and installation.

Mid-course corrections to the Statewide Multifamily Program have included increasing incentive levels of some measures with low participation levels and shifting program funding to measures that have high demand levels.

In light of these findings during program implementation future program designs shall include measure rebate levels of sufficient amounts to move high demand measures that require little, if any, customer contribution as well as kindle the interest of industry partners (i.e., contractors) to promote and drive market participation.

The four IOUs modified the Statewide Multifamily Program late in the 3rd quarter to encourage greater installation of energy demand controlling measures. An additional incentive of \$10 was added to the existing \$20 rebate for Programmable Thermostats. In addition, the IOU's expanded the options for central system controllers to include a non-graphing unit that is less expensive than digital graphing units, and should make installation of the measure more affordable for hard-to-reach small multi-family property owners. These decisions were made with the intent of further focusing property owners' attention toward dwelling improvement measures that can provide some of the greatest per dollar cost savings. Also, the demand for multifamily dwellings is so high in the State of California, and because rentals are at a premium and seldom vacant at this time, landlord/property owners are not motivated to purchase and install energy efficient measures.

**VI. Customer Disputes**

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Southwest Environmental Inc. (SWE) filed an informal complaint with the California Public Utilities Commission on July 25, 2002. SCE received notice of the informal complaint on August 13, 2002 and provided immediate response to both the CPUC representative as well as SWE. SCE responded to the concerns stated in the informal complaint to the satisfaction of SWE. We continue to maintain regular communications with this contractor and other contractors who support and participate in the Multifamily 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: **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 = \$900,000  
Expenditures to date = \$140,291
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*	5,100	3,908

\* Includes completed survey reports mailed to customers and surveys in process at the end of the third quarter.

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.



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

5. **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

6. **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 at least 50 percent of the mailed HEES to Hard-to-Reach (HTR) customers. Through the third Quarter, SCE has mailed a total of 215,000 HEES solicitation packages, 51 percent (110,000 surveys) of which were mailed to HTR customers. SCE mailed 28,000 Spanish surveys and 12,000 Chinese surveys to residential customers who have registered with our phone center a preference to transact business in their native language.

**IV. Program Accomplishments**

Statewide Third Quarter activities include:

- The Mail-In survey package was sent to 215,000 customers in the second and third quarters. The online program has been promoted via the Web site, press release, radio ads, energy efficiency literature, and bill inserts.
- 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 aired in August.

**V. Program Challenges**

Techniques used for outreach and promotion of the HEES program in past years is proving to be less effective this year. In the past, the use of direct mail campaigns

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and product promotion in energy efficiency literature has generally been sufficient to satisfy program goals.

With the introduction of HTR goals this year, which tends to limit availability of the mail-in product to a population that tends to have lower electricity usage, SCE is experiencing solicitation response rates of between six and seven percent. This is well below the 15 to 20 percent response rates seen in the past when surveys were sent to SCE's highest usage customers.

Despite extensive radio and print media advertising in the second and third quarters, the number of completed online surveys is well below the goal through the third quarter.

In an effort to make the outreach process more effective and meet completed survey goals, SCE has expanded the existing direct mail strategy and supplemented traditional outreach channels with new outreach channels. In the third quarter, SCE implemented the following:

Mail-In Surveys

- Additional direct mailing of 140,000 mail-in survey solicitation packets, including 28,000 Spanish and 12,000 Chinese, bringing the nine-month program total to 215,000 direct mail pieces.
- Distribution of 2,500 English and 500 Spanish mail-in surveys through SCE authorized payment centers.
- Promotion of mail-in surveys at county and regional fairs and other major events utilizing the Mobile Education Unit.

Online Surveys

- A major online marketing campaign is scheduled to be launched in October. The campaign will include blast e-mails to 480,000 SCE customers offering a direct link to the survey web page. In addition, banner ads will be placed on high-traffic regional web sites to drive traffic to the survey web page. At the close of the third quarter SCE is in negotiations with a number of major retailers to offer an incentive to those customers who complete an online survey.

**VI. Customer Disputes**

In August, SCE received one customer complaint regarding the accuracy of the Online Energy Survey results that were provided. The customer took issue with survey results that estimated the annual air conditioning usage. Xenergy, the vendor who administers the online survey, explained the methodology used to estimate electricity usage based on survey input. The customer seemed satisfied with the explanation he received and chose to not pursue the matter any further.

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**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 on a statewide basis. At SCE these efforts began during mid-July. SCE met the Commission’s mandate for having Spanish and Asian language version surveys available for 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 – Single-Family
- California ENERGY STAR® New Homes – Multi-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 homes have energy-efficient, money-saving, comfort and quality alternatives compared to standard new housing.

**II. Program Summary**

**1. Single Family:**

Total program budget = \$3,435,000

Expenditures to date (includes program commitments) = \$1,261,700

**Multi-family:**

Program budget = \$770,000

Expenditures to date (includes program commitments) = \$100,674

**2. 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>	-	-
<b>Committed</b>	1,503	1,399,341

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<b>Total Recorded</b>	1,503	1,399,341
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**Multi-Family**

	<b>Net Peak kW</b>	<b>Net kWh</b>
<b>Projected</b>	380	358,000
<b>Actual</b>	-	-
<b>Committed</b>	106	97,850
<b>Total Recorded</b>	106	97,850

3. Total number of customers served:

Projected:

4,660 Single Family units

2,000 Multi-Family units

Actual (Includes Committed):

2,013 Single Family units

314 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, \$1,261,700 = committed.

**Multi-Family:** \$0 = paid, \$71,500 = 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.

2. Customer Enrollment

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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.

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>
MF Applications	200	Direct Contact or Direct Mail	74
SF Applications	300	Direct Contact or Direct Mail	225
Tri-fold Brochure	2,500	Trade Show Handouts or Direct Contact/Mail	1,800

Other Marketing Activities:

- On August 21, sponsored the Sustainable Housing Seminar emphasizing strategies for encouraging sustainable design within communities throughout California. Both the CESNHP and local CEEP programs were presented to attendees.
- September 2002, a direct mail CESNHP program letter was sent to over 600 major builder key decision makers in SCE territory. Over 10 calls were received within 5 days of the mailing requesting additional program participation information and applications. Additional calls continue to come in.
- September 28, supported the Affordable Housing Expo with CESNHP single and multi-family program information as well as utility representation to reach potential projects specializing in hard-to-reach markets.

[www.socalgas.com](http://www.socalgas.com), [www.sdge.com](http://www.sdge.com), [www.pge.com](http://www.pge.com), and [www.sce.com](http://www.sce.com) have placed 2002 program information on the CESNHP. In addition the IOUs are

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coordinating with industry leaders such as The Building Industry Institute to provide program web links for additional access to utility program information for building industry.

6. Hard-to-Reach

20% of direct implementation funds need to be directed to the hard-to-reach markets. To date, the single-family program has directed 15% of the implementation funds to the hard-to-reach markets, this equates to 425 homes. In the multi-family program, 4% of the implementation funds have been directed to the hard-to-reach markets, this represents 70 multi-family units.

**IV. Program Accomplishments**

Due to the extensive marketing efforts launched in the second quarter of 2002, response to the CESNHP has continued to gain heavy momentum in the third quarter (both Single Family and Multi-Family programs) resulting in additional commitments and large amount of potential participants. It is anticipated that both programs will be fully committed by the end of the fourth 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, 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:

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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:

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 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 nonresidential 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 nonresidential facilities are eligible to participate.

**II. Program Summary**

1. Total program budget = \$9,650,000  
Expenditures to date (includes program commitments) = \$9,084,897

2. Total net demand reduction and energy savings:

	Net kW	Net kWh
<b>Projected</b>	8,620	41,719,000
<b>Actual</b>	259	3,956,068
<b>Committed*</b>	10,445	71,295,760
<b>Total Recorded</b>	10,704	75,251,828

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

3. Total number of customers served  
Projected: 75  
Actual: 133
4. Projected and actual number of units:  
Please refer to tables in the corresponding program workbook.
5. Total rebate (\$) paid = \$292,154.  
Total rebate (\$) committed to approved customer projects = \$8,003,594

**III. Program Implementation Status**

1. Status of program delivery

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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

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/Each Method</b>
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 third quarter, SCE committed to customers 100% of its allocated SPC incentive program budget. New project applications are being placed on the program's waitlist and may be funded if any active projects are cancelled.

**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 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.

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**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-

Twenty-seven 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, 18% 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 Title: **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 (includes program commitments) = \$3,135,899

2. Total net demand reduction and energy savings:

Due to the seasonality of this program, demand reduction and energy savings are expected during 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>	2,926	14,984,966
<b>Committed</b>	10,428	62,744,790
<b>Total Recorded</b>	13,354	77,729,756

3. Total number of customers served:

Actual = 3807 (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 =

Paid = \$2,193,801 Committed = \$1,825,813

**III. Program Implementation Status**

1. Status of program delivery

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The Express Efficiency program continues to be popular among its eligible customer group. A Summer Sale of selected premium rebates was announced 7/15/02 and allocated funding was exhausted 7/23/02 due to overwhelming popularity. A Fall Sale was announced 9/15/02 as an "extension" of the Summer Sale with additional customer limitations to manage the demand.

2. Customer Enrollment

Two blank copies of the program's customer application forms were sent to the California Public Utilities Commission's Energy Division along with the second quarter report. These forms are in continued use in the program. Additionally, an Excel version of the application (on CD) was also made available to customers. A copy of the CD will be sent along with this 3rd quarter report.

3. Workbook

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

4. Training

In continued efforts to encourage program participation a technology seminar was offered in Palm Springs to promote the reflective window film Fall Sale rebates for climate zone 15.

5. Marketing

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/Each Method</b>
Applications		Events,	
English-by program	60,000	customer	34,000
English-by survey program		representatives,	25,000
Spanish	2,000	customer	2,500
Chinese	2,000	requests	2,000
Vietnamese	2,000		2,750
Korean	2,000		2,000
Cd			1,500
<b>Total</b>	<b>68,000</b>		<b>71,000</b>
Business Connection (Business Service Guide)	290,000	Bill Insert	290,000
E-Mail Blast	3,725	e-mail	3,725
Brochures Save Energy/ Save Money	50,000	Event Handout	50,000
Summer Sale Press Release	200	Sent to News	
ACEEE Award Press Release	200	Outlets	

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Mailings			
Summer Sale Postcard	139,000	US Mail	139,000
Coachella Valley Postcard	1,800		1,800

**Other Marketing Activities:**

**Community Based Organization Outreach -**

The following events were held by SCE customer representatives to continue to promote the Express Efficiency program to various customer groups.

Approximately 7,000 customers and customer group representatives were in attendance at these events.

<b>Event Name</b>	<b># Attende ees</b>	<b>ABBREV</b>	<b>Event Date</b>	<b>Event Location</b>	<b>Host</b>
Korean Express Event - Rowland Heights	200	KEERH	7/6/02	18317 E. Colima Rd., Rowland Heights, 91748	Kim
Asian Gate Technical Training	5	AGTT	7/11/02	CTAC	Kim/Homstad
Santa Clarita Valley Nonprofit Leadership Advisory Council	26	SCVRC	7/11/02	26403 Golden Valley Rd., Canyon Country	Escamilla
Commercial & Industrial Lighting Workshop	50	CIW-2	7/12/02	Mammoth Lakes Service Center	Ford
Korean Dry Cleaners	20	KDLA	7/12/02	Gardena	Kim
Inland Korean Dry Cleaners Association	40	IKDLA	7/13/02	570 South Barranca, Covina	Kim
Sunrise Enterprise International/Vendor Pres.	8	SEP	7/15/02	CTAC	Squieri
Chinese CTAC Tour-Const. Engineers from China Power	15	CT 7/18	7/18/02	CTAC	Ng-Chan
Refrigeration Technical Training	15	RTT	7/18/02	CTAC	Kim/Vickers
Korean Express Event	200	KEEGG	7/20/02	9580 Garden Grove Blvd., Garden Grove 92844	Kim
National Association of Chinese American Bankers	600	NACAB	7/20/02	Omni Hotel, 251 S. Olive St., Los Angeles 90012	Ng-Chan
Nonprofit Energy Forum	40	IRWNPF	7/24/02	CTAC	Escamilla
Regional Hispanic Chamber Breakfast Meeting	20	RHC	7/24/02	Ontario, CA	Escamilla

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Energy presentations to Chinese-American Construction Professionals	700	CACP	7/26/02	Omni Hotel, Los Angeles	Ng-Chan
South Bay Business Water and Energy Forum	150	SBWEF	7/26/02	Torrance Cultural Arts Ctr, 3300 Civic Center Torrance	Escamilla
Korean Express Event - Los Angeles	200	KEEN	7/27/02	Los Angeles	Kim
Chinese CTAC Tour- APAC All Day Event	7	CT 7/30	7/30/02	CTAC	Ng-Chan
Korean Express Event Torrance	200	KEET	8/1/02	Torrance	Kim
CTAC Tour for Asian Pacific Community Center	10	CT 08/02	8/2/02	CTAC	Ng-Chan
Tawa Supermarket Press Conference	40	TSPC	8/3/02	140 W. Valley Blvd., San Gabriel, Tawa Supermarket	Ng-Chan
Angel Game	12	AngelGame	8/4/02	Anaheim Stadium	Davis
Big Creek	20	BC	8/10/02	Big Creek San Joaquin River Hydroelectric	Ng-Chan
Rosemead Chamber of Commerce	25	RCC	8/22/02	Charley Brown's Restaurant, Rosemead	Ng-Chan
Hispanic Market Express Efficiency Event	400	HPEE	8/24/02	Huntington Park, CA	Escamilla
Superior Market CFL Event	300	SMCFL	8/24/02	Superior Market, Huntington Park	Escamilla
Latin Business Association Workshop Presentation	20	LBA2	8/27/02	CTAC	Escamilla
Hispanic Chambers Leadership Energy Efficiency Forum	30	HCCTAC	8/28/02	CTAC	Escamilla
San Bernardino Chamber of Commerce Koffee Klatch	40	SBCKK	8/28/02	546 W. 6th St., San Bernardino 92405	Squieri
Korean Community Appreciation Event	36	KCAE	9/1/02	Edison Field	Kim
Chinese CTAC Tour	20	CT 09/06	9/6/02	CTAC	Ng-Chan
Palm Desert Chamber of Commerce 2002 Business Expo	500	PDCC	9/6/02	Agua Caliente Casino, Random Road, Palm Desert	Ford
Palm Desert Chamber of Commerce 2002 Business Expo	200	PDE	9/6/02	Palm Desert	Ford

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African Village Weekend	200	AVW	9/6/02	Ganesha Park, Pomona	Ford
Cathedral City Business Expo	100	CCBE	9/9/02	Doral Hotel, Andeau & Vista Chino, Cathedral City	Ford
Ventura Business Expo and Conference	300	VBEC	9/19/02	Ventura	Escamilla
Ventura County Business Showcase	3000	VCBS	9/19/02	Seaside Park, 10 W Harbor Blvd, Ventura	Escamilla
Hong Kong Association of Southern California-Business Mixer	200	HKASC-BM	9/25/02	Pacific Palm Conference Resort, City of Industry	Ng

Non-Profits, Schools, Tax-Exempt organizations -  
SCE representatives made presentations to tax-exempt customers who are eligible based on the revised aggregation exception rules to maximize the participation of this underserved group. The group events are as follows:

Contractors/ Vendors -  
Participating contractors and vendors were provided program information through mailings and e-mail blasts. These included the Summer Sale and Fall Sale announcements, the availability status of specific limited measures, etc..

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 third quarter of 2002, participation by this customer group was 44%, the reduction is due to the high influx of reservations of non hard to reach customers in response to premium Summer sale rebates (HTR participation % fell to 39%). In order to counteract the phenomena, during the Fall Sale, measure participation limits were established for the hard to reach and non hard to reach customer groups. This has ensured availability of measures and participation to all customer groups.

**IV. Program Accomplishments**

Ongoing program implementation includes workshops, seminars, website updates and community based organization (CBO) outreach.

On July 15, 2002, the Express Efficiency Summer Sale offered higher incentives on specific energy efficient measures. This sale was scheduled to run until October 15, however it was so successful, the sale closed by August in all IOU



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service territories.

On September 16, 2000, the Express Efficiency Fall Sale offered higher incentives on specific energy efficient measures. This sale is scheduled to run until December 13, 2002, or until all funds are reserved or paid.

The Express Efficiency program was advertised on Spanish speaking TV channels through the Univision Television Group statewide marketing and outreach program.

**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)

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

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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 = \$483,576

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 = 2,086 audits were completed through the third 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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2. Customer Enrollment  
Two blank copies of the nonresidential audit 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 conducted two "How to Do an Energy Audit" training sessions during the quarter.

5. Marketing

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/Each Method</b>
Press Releases	<b>9</b>		<b>9</b>
- Program Commencement	1	SCE's Media Outlets	1
- Business Solutions Outreach	1		1
- In-language Business Solutions Outreach Commencement	1		1
- Express Efficiency Rebate "Summer Sale"			
- English	1		1
- Korean	1		1
- Chinese	1		1
- Vietnamese	1		1
- Spanish	1		1
- California Utilities Receive National Award for Energy Efficiency	1		
Business Solutions Outreach Post Card Mailing - "High Temperatures"	291,800	U.S. Mail May, July	291,800
Placement Ad	1	Reprint in Newsletters	1

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Business Connection “Special Edition” SCE Business Electric Service Guide	790,000	Billing Insert April, July, August	790,000
Business Solutions Express Efficiency Summer Sale Trade Show Handout Piece (with mention of the NR Energy Audit Program)	12,500	Outreach Events	12,500
Business Energy Guide “Saving Energy & Money” Fact Sheet	10,000	Outreach Events	10,000
Events with NR Audit Program Information Available to Customers	56 Events	Outreach Events	Attendance: 3,336 7,949

The following web addresses provide access to the program’s online energy-use audit:

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 Business 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

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<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.

5. 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 period through the third quarter of 2002, SCE conducted 747 HTR customer energy-use 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 third quarter.

Marketing efforts included printing and distribution materials encouraging very small, small, and medium nonresidential customers to receive an onsite audit or to go use their personal computer to go online and take the energy-use survey at SCE's Web site. Also included was a post card mailing to customers in SCE's warm climate areas. The printed materials also mention the Statewide Express Efficiency Program, and, or rebates for small business customers. In addition, the program was marketed through information fact sheets, direct mail, face-to-face promotion of online energy-use audits, SCE phone call center referrals to the audit program, and IOU representatives promoting the program face-to-face to customers at business and trade association meetings, etc.

Program results accelerated during the third quarter due to the phased implementation of the full compliment of energy-use audit tools: online, onsite, CD ROM, mail-in, and phone audit tools.

**V. Program Challenges**

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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 -

*“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 Energy 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-use 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.

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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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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 –

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: July 1, 2002 thru September 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 = \$39,628

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: 75

Actual: 84

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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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 marketing 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 June 2002, the IOUs developed a Request For Proposal document and solicited bids from training vendors. These vendors were both local and nationally recognized. Vendors submitted proposals and made presentations to an IOU selection panel on July 10 and 11, 2002. A selection of a training vendor was finalized a week later.

The IOUs each executed individual contracts with the selected vendor for their scope of work. Program marketing began in late August 2002. By the end of the third quarter, SCE has enrolled 10 customers.

**V. Program Challenges**

Finding a vendor to provide high quality training at a reasonable cost was a difficult task to complete.

The BOC program, which is unknown in California, was difficult to generate interest and enrollment from customers. Marketing was a challenge that had to be overcome with additional effort such as IOU mass mailings, targeted phone calls, and account executive marketing.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

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**Program Specific Report: July 1, 2002 thru September 30, 2002**

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: July 1, 2002 thru September 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 (includes program commitments) = \$229,327

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: July 1, 2002 thru September 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.
3. 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 third quarter: July 31<sup>st</sup> in San Ramon, and September 25<sup>th</sup> in San Diego. During both meetings discussions continued on PIER technologies that are most ready for utility ET program consideration. A new Access 2000 database schema was developed and adopted for the group's Emerging Technologies Database. Program staff is engaged in populating the new database.

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**Program Specific Report: July 1, 2002 thru September 30, 2002**

***Technology Application Assessment Projects***

**Residential Economizer “Night Breeze” - Habitat for Humanity**

During the first quarter of 2002, SCE initiated field demonstration projects with the Long Beach and Orange County Chapters of Habitat for Humanity. Up to ten Habitat houses are planned to be part of the assessment efforts. SCE completed the building energy analysis during the third quarter. SCE is working with the Davis Energy Group to include the “Night Breeze” technology from PIER Contract No. 500-98-024 in all the homes.

**Integrated Design – Orange County Children’s Museum “Pretend City”**

SCE is working with the Orange County Children’s Museum on the design of a new facility: “Pretend City.” SCE staff is helping the customer’s design team to use an Integrated Design approach and Sustainable Design for the project. Multiple emerging technologies may be integrated into the final assessment project such as new building envelope materials, recycled materials, advanced daylighting concepts, lighting and controls, space conditioning, indoor air quality considerations, etc.

In addition, program staff was engaged in the planning and development of 10 potential assessment projects during the quarter. Signed agreements for customer demonstration projects will be concluded during the fourth quarter.

**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: July 1, 2002 thru September 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 (includes program commitments) = \$2,295,650

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>	570	4,280,000	0
<b>Whole-Building</b>	0	0	0
<b>Committed</b>			
<b>Systems</b>	1,180	6,136,000	0
<b>Whole-Building</b>	1,930	8,322,000	0



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**Program Specific Report: July 1, 2002 thru September 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 = \$182,894  
Total incentives (\$) committed = \$1,394,769

**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  
SCE's SBD program is currently on track in its delivery of the program.
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.
4. Training  
No training was offered this quarter.
5. Marketing

List Pieces	Quantity	Method of Delivery	# w/Each Method
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**Program Specific Report: July 1, 2002 thru September 30, 2002**

<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

No additional marketing material during the third quarter.

- 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.
- [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.

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**Program Specific Report: July 1, 2002 thru September 30, 2002**

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 70% 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.

In the 3rd quarter, SBD presented 5 Energy Efficiency design awards at the AIACC ceremony for outstanding efforts in incorporating energy efficiency in facility designs.

**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 September 30, 2002, 58% of committed funding was reserved under the Whole-Building Approach.

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**Program Specific Report: July 1, 2002 thru September 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, one of which is the Product Labeling Program. In this activity, SCE partners with retailers to help them promote the energy efficient versions of the products they sell.

The educational and information efforts of the energy centers, account management teams, 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 to date = \$1,736,764

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: 3,163

4. Projected and actual number of units:

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

5. Total rebate (\$) paid:

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**Program Specific Report: July 1, 2002 thru September 30, 2002**

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

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. SCE also conducted training of manufacturers and retailers at the Energy Star<sup>®</sup> national HVAC conference during the month of September.

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>	----
Advanced Lighting Technologies Flyer	1	E-Mail	----

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Basic Heating, Ventilation and Air Conditioning Flyer	1	Newsletter	----
Commerical and Industrial Lighting Flyer	1	Newsletter	----
CTAC Quarterly Calendar	58,213	Direct Mail	47,732
CTAC Quarterly Calendar	----	Hand Deliver	10,481
CTAC Quarterly Calendar	----	Website ( <a href="http://www.sce.com/ctac">http://www.sce.com/ctac</a> (CTAC main page))	----
CTAC Website	2	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))	2
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

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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	----
High Performance Commerical Building Facades Workshop Flyer	330	Direct Mail	300
High Performance Commerical 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: July 1, 2002 thru September 30, 2002**

Schools Energy Efficiency Workshop Flyer	1	E-Mail	----
AgTAC Quarterly	18,000	Direct mail	17,400
AgTAC Quarterly	----	Hand deliver	500
AgTAC Quarterly	----	Display	100
AgTAC Quarterly		Personal e-mail addresses	264
Sce.com/agtac	1	Website posting	1
Energyefficiencycenter.com	1	Website posting	1
Non-profit Energy Forum	150	Direct mail	150
Irrigation Workshop Flyer	50	Display	50
Commercial & Industrial Lighting Flyer	1,700	Direct Mail	1,500
Commercial & Industrial Lighting Flyer	----	Hand Deliver	200
Designing Sustainable Libraries Flyer	2,600	Direct Mail	2,600
Energy Audits & Management Systems for your Foodservice Facility Flyer	1600	Direct Mail	1352
Energy Audits & Management Systems for your Foodservice Facility Flyer	----	Hand Deliver	248
Energy Efficiency & Organizational Development Flyer	1	E-Mail	----



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**Program Specific Report: July 1, 2002 thru September 30, 2002**

Industrial Refrigeration Efficiency Flyer	800	Direct Mail	600
Industrial Refrigeration Efficiency Flyer	----	Hand Deliver	200
Successful Merchandising with Efficient Lighting Flyer	2600	Direct Mail	2479
Successful Merchandising with Efficient Lighting Flyer	----	Hand Deliver	121
Successful Merchandising with Efficient Lighting Flyer	----	E-Mail	----
Sce.com/agtac	N/a	Website posting	N/a
Energyefficiencycenter.com	N/a	Website posting	N/a
Freeway signboard	N/a	Signboard	N/a
Tulare Advance Register	8,300	Newspaper	8,300
Power Bulletin	18,000	Direct Mail	18,000
Business Solutions Newsletter	1	E-Mail	----

Other Marketing Activities – SCE prepared plans in conjunction with Lowe’s and Home Depot for the promotion of Energy Star® qualified programmable thermostats. These plans will be executed in the 4th quarter to support customers’ needs to winterize.

**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

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**Program Specific Report: July 1, 2002 thru September 30, 2002**

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 September 2002, SCE has provided 51 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 September 2002, SCE has provided 129 classes.

**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: July 1, 2002 thru September 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 = \$83,967

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 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 Table 4.2 shown in the corresponding program workbook.

5. Total rebate (\$) paid:

Not applicable to this information program.

**III. Program Implementations 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: July 1, 2002 thru September 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 third 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.

7/18/02	Residential and Nonresidential Building Standards
8/7/02	Residential and Nonresidential Building Standards
8/27/02	Residential and Nonresidential Building Standards

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**Program Specific Report: July 1, 2002 thru September 30, 2002**

**Third 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 third 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 ten CASE initiatives during the quarter. Program staff anticipates that all ten CASE initiative agreement forms will be completed during the fourth quarter 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: July 1, 2002 thru September 30, 2002**

Program Title: **Upstream Residential Lighting**

**I. Program Overview**

This statewide program solicits proposals from interested 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 to date = \$1,374,709

2. Total net demand reduction and energy savings:

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

	<b>Net kW*</b>	<b>Net kWh*</b>
<b>Projected</b>	1,950	25,626,000
<b>Actual</b>	0	0
<b>Committed</b>	3,297	22,670,878
<b>Total Recorded</b>	3,297	22,670,878

\*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: None in 3<sup>rd</sup> Quarter

4. Projected and actual number of units:

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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.
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  
An overarching media campaign was delivered during late July and August.
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 through December 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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**Program Specific Report: July 1, 2002 thru September 30, 2002**

Program Title: **Marketing and Outreach**

**I. Program Overview**

**Flex Your Power – Energy Efficiency** is a statewide consumer marketing campaign focused exclusively on energy efficiency. The goal is to build awareness of Energy Star products. The campaign uses a series of advertisements to promote Energy Star products as part of the statewide *Flex Your Power - Energy Conservation Campaign*. The advertising is developed to compliment the ongoing conservation messages of the *Flex Your Power* campaign.

The target market is residential consumers throughout California including African American, Asian and general markets. With the exception of newspaper ads, the Hispanic market was not included due to a separately funded Univision program. Overall, the marketing plan includes three messages which focus on specific Energy Star products in the months of May, August and October of 2002. Each message runs for three weeks via television and radio, and to a lesser degree, in newspaper.

**Univision Television Energy Efficiency Marketing (U-TEEM)** is a consumer marketing and outreach program. Its goal has been to build awareness of and increase participation in energy efficiency rebate programs and other energy reduction initiatives. The target market has been hard-to-reach Hispanic investor-owned utility (IOU) customers. The energy efficiency messages were distributed through a combined schedule of 10- and 60-second Spanish-language commercials.

**II. Program Summary**

1. Budget and Expenditures

**Flex Your Power – Energy Efficiency**

Budget - \$8,057,000

Due to reporting practices within the advertising industry, final confirmation of quarterly media expenses will not be available until January 30, 2003. Therefore, a final reconciliation of quarterly expenses will be provided after the media outlets supply data required to develop a final quarterly post-buy. The previously referenced attached media flowchart and budget summary outlines estimated quarter expenditures.

**Univision Television Energy Efficiency Marketing**

Budget - \$2,000,000

Expenditure to date = \$1,816,554

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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:

**Flex Your Power – Energy Efficiency**

As of September 2002 the *Flex Your Power – Energy Efficiency Campaign* has reached 95% of the target audience an average of 18.8 times as follows:

<u>Product Message</u>	<u>Timing</u>	<u>Reach/Frequency</u>
Energy Star Ceiling Fans	May	95%/9.4 times
Energy Star Washing Machines	August	95%/9.4 times

**Univision Television Energy Efficiency Marketing**

Projected: At the outset of the program, it was estimated that the energy efficiency messages aired on Univision would reach an estimated 93,591,000 viewers total between the ages of 18 and 49.

Actual: By the end of the schedule, approximately 97,563,000 viewers between 18 and 49 were reached. This is 104% of the original goal.

4. Projected and actual number of units:

Not applicable to the statewide marketing and outreach activities.

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

**III. Program Implementation Status**

1. Status of program delivery

Administration of the Statewide Marketing and Outreach campaign has changed from the Department of Consumer Affairs to Southern California Edison for 2002.

**Flex Your Power – Energy Efficiency**

As originally established in the Implementation Plan, Grey Worldwide developed all *Flex Your Power Energy Efficiency Campaign* messages to be

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consistent with the *Flex Your Power Conservation Campaign* in the following formats:

- 30-Second Television
- 60-Second Radio
- Full-Page Black/White Newspaper

All scripts, concepts and layouts were provided to the CPUC and IOUs, for review, editing and approval. Once production was completed, rough cuts, finished radio spots and final newspaper ads were provided to the IOUs for review.

**Univision Television Energy Efficiency Marketing**

As originally established in our Implementation Plan, Staples/Hutchinson wrote English-language scripts for the 10- and 60-second messages, which were provided to the CPUC and the IOUs for review, editing and approval. In coordination with the IOUs, Staples/Hutchinson provided Spanish-language translations of the approved scripts. Once the commercial production was completed, the rough cut was provided to the IOUs for review. Commercials with localized tags were provided to all eleven Univision stations at least two weeks prior to air date.

In July, at the request of the IOUs, Staples/Hutchinson revised the *Cooling Equipment Rebates* commercial to include rebate information about the programmable thermostat. At the request of the IOUs, the original television schedule was revised to accommodate the joint service territories in and around Los Angeles. As a result, the following commercials only ran on behalf of the respective IOUs August 5 through August 26 – September 1:

Southern California Gas Company – *Energy Star® Appliance Rebates*  
Southern California Edison – *Cooling Equipment Rebates*  
Pacific Gas and Electric Company – *Cooling Equipment Rebates*  
San Diego Gas & Electric – *Energy Star® Appliance Rebates* and  
*Cooling Equipment Rebates*

2. Customer Enrollment  
Not applicable.
3. Workbook  
Not applicable.
4. Training  
The program did not sponsor any training during the quarter.
5. Marketing

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**Flex Your Power – Energy Efficiency**

The *Flex Your Power – Energy Efficiency Campaign* was augmented with a statewide point-of-purchase retailer program funded by the State and Consumer Services Agency (SCSA). The program provided point-of-purchase (POP) materials to participating retailers. The materials were designed to educate and persuade consumers to purchase Energy Star appliances. Materials included salesperson training guides, consumer brochures, aisle violators, and product decals. In addition to POP materials, participating retailers were featured in an incremental full-page, black/white newspaper ad. This augment created a completely integrated communications program:

- TV & Radio messages established broad awareness of Energy Star washing machines
- Newspapers messages drove consumers to participating retailers
- POP messages further educated consumers about featured products details and rebates, ultimately prompting a purchase.

**Univision Television Energy Efficiency Marketing**

The commercials, researched and written by Staples/Hutchinson and Associates, Inc., aired on eleven Univision television stations throughout California. Each was tagged with the appropriate phone number of the investor-owned utility serving that particular area. The television schedule began May 20, 2002, and ended September 15, 2002.

The television schedule was augmented by interviews with IOU and CPUC staff on Univision news programming and the distribution of literature and information at special cultural and community events.

Only the Univision stations in San Diego and Los Angeles did not meet their goals. Therefore, we plan to air an additional schedule of commercials on KMEX (LA) and KBNT (SD). After coordination with the IOUs, the schedule will air the “Online Survey” message in support of the statewide Home Energy Efficiency Survey program.

In addition, Staples/Hutchinson and Associates, Inc. augmented customer reached through news releases sent to Spanish language newspapers throughout the state, with a combined readership of 2,568,621.

Univision stations also have installed exterior signage and lobby displays/literature at their individual facilities. Each station incorporated information about energy efficiency rebates and other energy reduction programs in the booth that they staff at various community events.

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The television campaign was augmented with a Univision booth at special cultural and community events. This initiative was so successful that an additional 20,000 pieces of literature were printed and distributed to Hispanic audiences throughout the state.

The Univision scheduled was further enhanced by talk show appearances on a number of stations. Between July 1 and September 15, representatives from CPUC and the IOUs made talk show appearances as follows:

<u><b>ORGANIZATION REPRESENTED</b></u>	<u><b>STATION/LOCATION</b></u>
CPUC and PG&E	KDTV in San Francisco
CPUC and PG&E	KUVS in Sacramento
PG&E	KABE in Bakersfield
PG&E	KFTV in Fresno
SDGE	KBNT in San Diego
SCE and SoCalGas	KVER in Palm Springs
SCE	KFTV in Fresno

The Univision Television Energy Efficiency Marketing campaign was initiated the week of May 20 and continues to air. The schedule accomplished to date is as follows:

<b>AIR DATES</b>	<b>COMMERCIAL/TOPIC</b>
July 8 – July 21	Refrigeration Recycling •\$35 in cash or 5 CFLs
July 22 – July 28	Small Business Programs • Express Efficiency Rebates • Savings By Design • Statewide Energy Audits • Emerging Technologies Program
August 5 – September 1	Energy Star® Appliance Rebates • Dishwasher • Clothes Washer • Hot Water Heater
September 2 – September 15	Heating Equipment • Gas Furnace \$200 • Heat Pump \$175-\$500 • Programmable Thermostat \$20

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6. Hard to Reach

**Flex Your Power – Energy Efficiency**

In addition to the general market, the *Flex Your Power – Energy Efficiency Campaign* targeted the hard-to-reach Asian and African American markets in California. Although the CPUC selected Univision for media outreach to the Spanish-speaking population, that plan did not include any print advertising. Therefore, this plan directed messages to the Spanish-speaking market via community newspapers.

African American targets were over represented in the planned general market television and radio buys, therefore the media plan did not call for purchasing separate broadcast media. However, full-page newspaper ads were placed in African American market community newspapers. In the Asian market, the campaign reached consumers who speak Chinese, Korean and Vietnamese via television, radio and newspaper.

**Univision Television Energy Efficiency Marketing**

UTEEM is completely targeted to the hard-to-reach Hispanic market, whose language barrier prevents them from fully taking advantage of the IOU's rebate and energy reduction programs. Please refer to section II.3. of this report for a summary of the numbers of Spanish-speaking Hispanics reached to date.

**IV. Program Accomplishments**

See Marketing section.

**V. Program Challenges**

**Flex Your Power – Energy Efficiency**

The experience of planning, producing and implementing the campaign has been a challenging yet pleasurable one. As of September, the most pressing challenge has been transition of the campaign implementation between the Department of Consumer Affairs and Southern California Edison. The transition occurred in the midst of production on the Energy Star Washing Machine messages. Contractual details threatened to put the program on hold. However, thanks to intervention of SCE, the campaign moved forward as scheduled. SCE is to be commended for ensuring the campaign's success.

Day-to-day challenges focused on securing communication approvals from a variety of stakeholders including, the IOUs, DCA, SCSA and Energy Star. However, an efficient system was implemented that has led to a smooth approval process.

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**Univision Television Energy Efficiency Marketing**

The experience of planning, producing and implementing the U-TEEM program has been a pleasure. At the outset, there were some wrinkles to iron out regarding proofing responsibility and lines of communication among the IOUs. However, once these were solved the proofing and approval of the commercial and schedule ran smoothly. The schedule was affected by seasonal variances in viewership among the eleven stations, but the final outcome was a total audience reached exceeds our original goal. As noted previously, shortfalls in Los Angeles and San Diego will be made up in November with an extended schedule.

SCE was very helpful in this regarding, surveying all IOUs to make sure that all commercials were accurate and appropriate to their respective service territories.

A particularly gratifying outcome of this program has been letters of support from federal, state and city officials. We have attached copies of four letters of commendation generated by U-TEEM. Furthermore, Univision has been made aware that it can expect other such letters in the near 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, Ordering Paragraph No. 4 –

*“Edison shall execute third-party contracts with DCA and Univision, respectively, within 30 days of the effective date of this decision. DCA and Univision shall not receive program payments if they are not in compliance with their IOU contracts. If the parties cannot agree on contract language, they shall immediately contact the assigned Administrative Law Judge to seek a resolution.”*

Response –

SCE enter into contract agreements with both the Department of Consumer Affairs and Univision within the required time set forth by the Commission. During the second quarter of 2002, the Commission directed SCE to replace the Department of Consumer Affairs’ as contract manager of the general statewide media campaign.

Decision 02-03-056, Ordering Paragraph No. 15 -

*“Edison shall contract with the Department of Consumer Affairs (DCA) and PG&E shall contract with Univision Television Group (Univision) to carry out the statewide marketing and outreach programs we approve in this decision. The*

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*contracts shall ensure that third parties do not use PGC funding for conservation and/or load-shifting messages that rely only on temporary or impermanent behavioral change. Edison and PG&E shall not make payments to the DCA and/or Univision unless this requirement is met. DCA and Univision will have ultimate responsibility for advertising content as long as it is consistent with this decision.”*

Response -

In Decision 02-07-040, the Commission directed SCE to act as a replacement for the Department of Consumer Affairs. In response, SCE enter into a contract with DCA’s prime vendor, Grey Worldwide Advertising, to deliver the Flex Your Power – Energy Efficiency campaign. SCE also enter into an agreement with Univision to carry out their portion of the statewide media campaign.

Decision 02-03-056, Ordering Paragraph No. 16 -

*“DCA and Univision shall consult with IOU energy efficiency program managers to coordinate the timing of statewide and IOU messages and programs. The DCA shall use a portion of its funding to update its website to include information on all Commission-funded statewide and local energy efficiency programs. DCA shall be responsible to secure this information at least twice during the program year and to update its web information as it receives updates from program providers.”*

Response -

Each of the investor-owned utilities and the prime vendors (Grey Worldwide Advertising and Univision) are working in a collaborative fashion to coordinate the timing and message of the statewide media campaigns and the statewide energy efficiency programs.

Decision 02-03-056, Ordering Paragraph No. 17 -

*“The IOUs shall work together to market their statewide programs. To the extent the IOUs offer the same programs, they shall advertise them together. The IOUs shall keep the Energy Division informed in their Program Implementation Plans and quarterly reports of what they are doing or will do to further this collaborative goal. They shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.”*

Response -

Throughout this quarterly report, SCE has identified areas where the statewide programs have coordinated with the statewide marketing and outreach activities.

Decision 02-07-040, Ordering Paragraph No. 3 -



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*“Edison shall take over the PGC-funded portion of the Flex Your Power campaign consistent with D.02-03-056 and may make such uses of the Flex Your Power marks as are authorized by DCA.”*

Response -

SCE enter into a contract agreement with the DCA’s prime vendor, Grey Worldwide Advertising, to continue the Flex Your Power – Energy Efficiency campaign begun by DCA. The current statewide marketing and outreach activities follow DCA’s planned implementation for 2002.

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2002 Energy Efficiency Programs  
Third Quarter Report**

**Index**

**Local Programs**

- 1. Residential In-Home Energy Survey**
- 2. Small Nonresidential Hard To Reach**
- 3. Pump Test and Hydraulic Services**
- 4. Demonstration and Information Transfer**
- 5. Local Government Initiative**
- 6. Local Codes and Standards**

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**Program Specific Report: July 1, 2002 thru September 30, 2002**

Program Title: **Residential In-Home Energy Survey**

**I. Program Overview**

The Residential In-Home Energy Survey program provides customers, particularly hard-to-reach customers who do not respond to Internet and mail-in survey options, with a more personalized, face-to-face energy survey option. Maintaining this option is particularly important in 2002, with customers facing 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.

**II. Program Summary**

1. Total program budget = \$700,000

Expenditures to date = \$167,460

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>In-Home Survey Targets</b>
Projected	4,500
Actual	2,535

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 24, 2002.

2. Customer Enrollment

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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 program workbook for details of program expenditures and activities.

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.

5. Marketing

Third quarter marketing activities:

2. Additional direct mail of 75,000 solicitation packets sent to HTR customers, bringing nine-month total to 125,000.
3. A three-quarter-page advertisement in the Penny Saver magazine appearing on September 25, October 2, and October 9, circulated in HTR zip codes.
4. Spanish radio ads on six major Spanish radio stations in San Bernardino and Riverside Counties.
5. Promotion and sign-ups at county and regional fairs and other major events utilizing the Mobile Education Unit.

6. Hard-to-Reach

Based on market analysis, SCE determined that certain hard-to-reach customer segments had a greater propensity than other customer segments to respond positively to an in-home survey offering than to offers of Internet or mail-in surveys.

SCE has continued to target Latino customers and has expanded the outreach program to include customers in rural locations utilizing direct mail, print media, and Spanish radio advertising.

The In-Home Energy Survey has the advantage of being able to respond to the needs of certain hard-to-reach customer groups by providing an alternative delivery channel to the statewide Home Efficiency Survey program through individual interaction.

SCE's HTR goal is at least 50 percent participation by HTR customers as defined by the CPUC.

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**IV. Program Accomplishments**

- Completed 56 percent of completed survey goal through the third quarter.
- HTR participation estimated at 60 percent of completed surveys.
- Piloted Spanish radio ads specifically designed to promote in-home energy surveys to Spanish speaking customers.
- Developed pilot program utilizing the Mobile Education Unit and an incentive to increase participation in HTR communities.

**V. Program Challenges**

**Third Quarter Activities**

The techniques used for outreach and promotion of the In-Home Energy Survey Program in past years is proving to be less effective this year. In the past, direct mail and phone center referrals have been sufficient to satisfy program goals. With the introduction of HTR goals this year, which tends to limit availability of the product, and less than anticipated phone center activity, the number of completed surveys is well below the goal through the third quarter. Response to direct mail solicitation of HTR customers is running about one percent this year, as opposed to a more typical response rate of about three percent for high usage customers in past years.

In an effort to make the outreach process more effective, SCE has expanded the existing direct mail strategy to a total of 125,000 direct mail pieces and supplemented traditional outreach channels with new outreach channels as described in the Marketing section.

**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.

- The goal of the 2002 In-Home Energy Survey Program is to complete (including scheduled in-home audits) 4,500 surveys by December 31, 2002.
- The Residential In-Home Energy Survey Program will achieve 50% program participation by hard-to-reach customers as defined by geographical areas (including rural, moderate income) as defined by the CPUC's Energy Efficiency Policy Manual.

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**Program Specific Report: July 1, 2002 thru September 30, 2002**

Program Title: **Small Nonresidential Hard To Reach**

**I. Program Overview**

The Small Nonresidential Hard To Reach Program, also known as the Small Business Lighting Retrofit Program, provides low cost and no cost energy efficient equipment and information to the very small business (under 20kW) customer with special focus on the economically disadvantaged business and those customers defined as hard to reach by the California Public Utilities Commission (CPUC). For this program, hard to reach customers are defined as customers who are located in rural zip codes and have a monthly demand of less than 20kW. The program is open to small businesses located within Southern California Edison's (SCE) service territory.

**II. Program Summary**

1. Total program budget = \$1,262,200  
Expenditures to date = \$565,062

2. Total net demand reduction and energy savings

	<b>Net KW</b>	<b>Net kWh</b>
Projected	547	2,569,570
Actual	0	0
Committed	344	1,624,327

3. Total number of customers served:

Projected: 600

Actual: 425

4. Projected and actual number of units:

Projected = 22,048

Actual = 9,392

Please refer to the "Committed" units shown in the corresponding program workbook.

5. Total rebate (\$) paid.

Not applicable to this 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 24, 2002.

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2. Customer Enrollment  
Customers may enroll at the time of the contractor visit or are provided literature along with a call back telephone number.
3. Workbook  
Please refer to informational tables shown in the corresponding program workbook for details of program expenditures and program activities.
4. Training  
Customer training is typically not conducted due to the nature of the program but will be offered in 2003 program. The training will consist of a brief explanation to the customer of the source of the funding (PGC) so the customer has a better understanding of the program.
5. Marketing
  - Customers were solicited by direct-mail, telemarketing, and direct contact. Word-of-mouth advertising was also evident. Customer communication was conducted 'in language' where appropriate.
  - There were no detailed application forms to fill out. Customer sign-up was as easy as setting an appointment.
6. Hard-to-Reach  
This program is designed to help the hard to reach small business customers attain long-term energy savings by:
  - Demonstrating the benefits of energy efficient equipment using the customers existing lighting infrastructure by the use of an energy audit (evaluation) and then sharing the potential for energy savings in an easy to understand format(worksheet).
  - Retrofitting/Replacing older less efficient equipment with new high efficient lighting equipment.

**IV. Program Accomplishments**

- In language literature has been developed and is in use. Languages are Spanish, Chinese and Korean.
- Program promoted at two customer events.
- 425 customer facility audits have been performed.

**V. Program Challenges**

- Hours of Operation-Small Business owners typically maintain strict operating hours, which will at times require follow-up visits.

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- Trust- A few small business owners initially demonstrated a mistrust of the program's 'no-charge' policy. IOU Program Manager has intervened to convince the customer of the validity of the program.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

None



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**Program Specific Report: July 1, 2002 thru September 30, 2002**

Program Title: **Pump Test and Hydraulic Services**

**I. Program Overview**

Southern California Edison's (SCE) Pump Test and Hydraulic Services (PT&HS) program has delivered high quality pump testing services and quality technical information since 1911. Each year the program has been refined to present the customer with the information they need and pump testing data to implement energy efficiency measures for their hydraulic application.

**II. Program Summary**

1. Total program budget = \$1,667,800  
Expenditures to date = \$556,635

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:

Pump Tests Performance Projection = 2,000

Actual tests performed during the third quarter of 2002 = 599. Total pump tests performed to date = 1,418.

Energy Efficiency Customer Contact Performance Projection = 1,750

Actual EE Customer Contacts performed during the third quarter of 2002 = 528.  
Total EE Customer Contacts performed to date = 928.

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

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**Program Specific Report: July 1, 2002 thru September 30, 2002**

No change from the program implementation plan submitted to the California Public Utilities Commission (CPUC) on May 24, 2002.

2. Customer Enrollment

This program targets downstream and upstream market participants. The primary targets are the downstream pumping system operators, who primarily are agricultural and water agency customers. Other nonresidential customers, who use significant energy for hydraulic pumping, include golf courses and sewage treatment plants.

SCE promotes the program to all eligible customers, through many different channels, including our energy efficiency account representatives, events at our energy centers in Irwindale and Tulare, participation in water trade associations, and equipment distributors and installers. Customers interested in a pump test must contact SCE. Tests are scheduled on a first come, first served basis.

3. Workbook

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

4. Training

SCE developed and presented two training classes in August. SCE partnered with California State University, Fresno in providing the *Pumping System Design and Energy Efficiency* class.

SCE also provided the instructions for the *Water Treatment and Distribution* class to the Valley Counties Water Association as part of their California Department of Health and Services certification program.

5. Marketing

Our marketing plan capitalizes on the use of outreach programs that enable it to reach a wide range of customers such as city/county agencies, municipal water districts, and members of ACWA (Association of California Water Agencies) located within SCE's service territory.

6. Hard-to-Reach

Pump Test & Hydraulic Services will continue in its efforts to provide needed services and information to geographically hard-to-reach customers. Due to the

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industry that PT&HS services, many of the customers are by definition hard-to-reach customers and their businesses are located in outlying, rural locations.

**IV. Program Accomplishments**

SCE's Pump Test and Hydraulic Services group tested 599 pumps. This activity represents over 71% year-to-date goal attainment. PTHS program is an information program. However, based on the evaluations of this program in the past, the performance of these tests and the reporting of the energy efficiency results and recommendations to the customers will directly lead to the customers' taking action to increase the efficiency of the system by making the recommended repairs.

During this quarter, almost 530 customer contacts were made. These customer contacts provided information that related to energy efficiency educational material, program information, and/or technical assistance. The year-to-date effort has amassed 928 total customer contacts, which is approximately 53% of the total goal.

**V. Program Challenges**

In the fourth quarter, weather and holiday events will add to the normal day-to-day distractions that prevent customers from focusing on energy efficiency activities. In order to keep energy efficiency as a viable option in the customer's mind, it will be important to continue to leverage the energy saving opportunities presented by the performance of a pump test with other available energy efficiency training and incentive programs.

**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 02-05-056 -

*"We require SCE to hire an independent, third party evaluation, measurement and verification contractor and to provide measurable performance goals in the implementation plans, i.e. number of planned pumping system tests."* (Attachment A, p. 60)

Response -

In regards to SCE's overall measurement, evaluation, and verification plans and required performance goals, SCE has provided this information in the program implementation

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plans filed with the CPUC on May 24, 2002 and are also shown in the corresponding program workbook.

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Program Title: **Crosscutting Demonstration and Information Transfer**

**I. Program Overview**

The Local Crosscutting Demonstration and Information Transfer 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 Southern California Edison's (SCE) service territory. The program targets both residential and nonresidential customer segments, including new construction, and engages in Demonstration & Information Transfer activities. The program is related to the statewide Emerging Technologies (ET) program, but is local in scope.

**II. Program Summary**

1. Total program budget = \$450,000

Expenditures to date = \$68,840

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 Local Crosscutting Demonstration and Information Transfer program focuses on the promotion of emerging technologies to all customers.

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 24, 2002.

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4. 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.

5. Workbook

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

6. Training

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

7. Marketing

The program did not produce any new external marketing products during the quarter.

8. Hard-to-Reach

The Local Crosscutting Demonstration and Information Transfer program does not have specific goals for the hard-to-reach market segments. In general, the information the program generates through its demonstration activities tends to benefit all customers. One of the aims of the program is to explore the extent of application a new technology has in various market segments, in an effort to characterize the widest possible deployment opportunities. Thus, the program will seek opportunities to host appropriate demonstration projects at hard-to-reach customer sites, such as ethnic, small commercial, and residential customers. The information transfer will leverage the utilities overall efforts aimed at hard-to-reach customers.

**IV. Program Accomplishments**

During the third quarter, the following technology application assessments were being pursued:

- 1. Improving HVAC Performance and Indoor Air Quality (IAQ) using Ultraviolet Light.** This a field test conducted at an office facility in collaboration with the HVAC industry. An agreement with the manufacturer's major distributor in southern California was signed on September 9, 2002 to perform this assessment. The project installed a UV lamp in a rooftop package heat pump. The UV light should reduce bacterial growth on the cooling coil surfaces and reduce the pressure drop across the coils. This should improve the unit's overall cooling coil performance and improve the indoor air quality. Biological samples were collected prior to lamp activation. The project was near 50% complete at the end of the third quarter.

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- 2. Spray-on Radiant Barrier for Existing Residential and/or Small Commercial Buildings.** A low emissivity coating will be sprayed onto the underside of roofs to form a radiant barrier. The radiant barrier will reduce attic air temperatures, and consequently reduce a structure's cooling load. This is a proposed field demonstration project at several customer sites in SCE's desert service area. The customer sites have yet to be selected, and no agreements have been signed. SCE expects to have sites and agreements signed during the fourth quarter for this assessment project.
  
- 3. Low-E Pigment for Stucco and Paints for Residential and/or Small Commercial Buildings.** Low-e pigment for stucco and paints will be applied to building structures to reduce cooling loads and energy usage. Customer sites have not been selected, and no agreements have been signed. SCE expects to have sites and agreements signed during the fourth quarter for this assessment project.
  
- 4. Integrated Design for Nonresidential Retrofit Buildings.** SCE will work with the customer's design team to optimize the overall site's energy usage using an integrated design approach during the design phase of a retrofit project. SCE is negotiating with the El Segundo Unified School District, and anticipates signing an agreement during the fourth quarter.
  
- 5. High Speed Hands Dryer.** A recently introduced hand dryer uses high velocity air to blow away most of the water on the hands and reduces the drying cycle by half of the time compared to a conventional hand dryer. A customer agreement to perform this assessment is not required. The project is close to 20% complete at the end of the third quarter.
  
- 6. Advanced Heuristic Thermostatic Control System.** A new type of advanced thermostat, with an embedded heuristic control function wired to either one or more occupancy sensors, may be used to control a room's cooling and heating demand. A field demonstration project, in collaboration with the manufacturer, will retrofit the advanced thermostat into an existing school facility. SCE is pursuing the assessment project with the Arcadia Unified School District. SCE expects to have a signed agreement during the fourth quarter.

**V. Program Challenges**

No significant problems encountered to date.

**VI. Customer Disputes**

None.

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**VII. Compliance Items**

There are no remaining CPUC regulatory compliance items directly relating to this program.



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Program Title: **Local Government Initiative**

**I. Program Overview**

Southern California Edison's Local Government Initiative (SCE-LGI) 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. Designed with extensive input from Southern California local government building departments, the innovative programs offered through SCE-LGI are designed to help local governments build self-sustaining energy efficiency partnerships with their constituents.

**II. Program Summary**

1. Total program budget = \$850,000  
Expenditures to date = \$309,328
  
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:  
Projected:  
16 New local jurisdictions  
12 Jurisdictions hard-to-reach  
  
Actual:  
15 Jurisdictions committed  
11 Jurisdictions identified as hard-to-reach
  
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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**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 24, 2002.

2. Customer Enrollment

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

A new brochure for the program was designed and created for distribution to existing jurisdictions. In addition, SCE created customized CEEP brochures by adding the city logo to the brochures if requested. A direct mail piece was sent to targeted jurisdictions promoting CEEP and well as other cross-cutting programs CheckPoint and Express Efficiency

6. Hard-to-Reach

The Local Government Initiative will focus its efforts on primarily hard to reach jurisdictions in rural and/or predominantly moderate-income areas. To date, the program has secured 11 new local jurisdictions to the program from hard to reach geographical areas.

**IV. Program Accomplishments**

During the third quarter, 11 new jurisdictions have become CEEP participants of which 8 of the jurisdictions fall within the hard-to reach areas.

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The SCE-LGI program was presented to over 50 participants at a one-day seminar featuring Sustainable Building Programs and Policies in California. Participants included key local government officials.

**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 02-05-046 -

*“We require SCE to provide more detailed budget information specifically on direct implementation costs and to hire an independent, third party evaluation, measurement and verification contractor.”* (Attachment A, p. 59)

Response -

To fulfill the requirement associated with direct implementation costs, SCE has provided more detailed information regarding the program budget as shown in Attachment B. SCE's overall measurement, evaluation, and verification plans may be found in Section 5.

In response to CPUC direction, SCE will notify customers that they cannot receive rebates, discounts, incentives or other services from more than one program for similar measures installed by the same customer. Furthermore, in the role as contract administrator, SCE will require third parties to eliminate customer double-dipping.

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Program Title: **Codes and Standards, Local**

**I. Program Overview**

This local 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.

**II. Program Summary**

1. Total program budget = \$50,000

Expenditures to date = \$14,979

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 Local 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.

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**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 24, 2002.

2. Customer Enrollment

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

4. 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.

7. Marketing

The program did not conduct any marketing activities during this quarter.

8. 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**

SCE program staff is working to complete one code training class in the fourth quarter. The tentative date for the class is December 12, 2002.

**V. Program Challenges**

No significant problems encountered to date.

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**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 02-05-046 -

*“We require SCE to provide more detailed budget information specifically on direct implementation costs. An independent, third party shall perform evaluation, measurement and verification of the program.”* (Attachment A, p. 55)

Response -

To fulfill the requirement associated with direct implementation costs, SCE has provided more detailed information in the program workbook. SCE’s overall measurement, evaluation, and verification plans may be found in Section 5.

In response to CPUC direction, SCE will notify customers that they cannot receive rebates, discounts, incentives or other services from more than one program for similar measures installed by the same customer. Furthermore, in the role as contract administrator, SCE will require third parties to eliminate customer double-dipping.

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**Measurement, Assessment and Evaluation (MA&E) and Statewide Evaluation,  
Measurement and Verification (EM&V)**

The IOU measurement and evaluation staffs are in the process of reviewing recently ALJ approved, request for proposals (RFPS) for CPUC required MA&E studies along with statewide EM&V for IOU programs.

On October 11, 2002, Administrative Law Judge Sara Thomas, approved RFPs submitted by the IOUs to conduct MA&E studies as requested by the CPUC and statewide EM&V studies as required by the CPUC. There are a total of 19 studies assigned to the IOUs; four MA&E and fifteen EM&V. PG&E is responsible for conducting seven of the nineteen. PG&E, along with the other IOUs, anticipate releasing updated RFPS (changes will include updated timeline) within the next three weeks. PG&E anticipates signing contracts for all studies no later than end of January 2003.