

Southern California Edison

**2001 Energy Efficiency Programs
First Quarter Report**

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Section 1: Executive Summary

Introduction

In response to the expected energy supply shortages and high prices for electricity over the next few years, SCE has refocused the energy efficiency program portfolio on maximizing energy savings and demand reductions potential for all customers. The California Public Utilities Commission has provided SCE, and other California investor-owned utilities, the flexibility to modify program design and funding levels to optimize the program portfolio's potential. With these program modifications in place, SCE expects to achieve approximately 390 million kWh of net annualized energy savings and over 90 MW of demand reductions in program year 2001.

During the first quarter of 2001, SCE's energy efficiency programs achieved nearly 200 million kilowatt-hours (kWh) of net annualized energy savings and 45 MW of net demand reductions. In addition, the Summer Initiatives employed within SCE's service territory have achieved approximately 80 million kWh of annualized energy savings and 38 MW of demand reductions.

Residential

For 2001, SCE has expanded the residential rebate offerings under its Home Efficiency Rebate program. Customers can now sign-up for a rebate on a number of energy efficient appliances and equipment by calling a toll-free number or on-line at www.sce.com. SCE also is continuing its very successful refrigerator recycling program. As added incentive to customers, SCE is offering a 5-pack of compact fluorescent bulbs to customers who recycling their refrigerator or freezer. SCE has also revised the residential energy guide to provide "Quick Tips" on how to conserve energy and participate in energy efficiency programs. The Residential Contractor program for single-family residences is now focused on delivery duct test and repair through qualified residential contractors. In the promotion of the residential lighting program, SCE continues to use an upstream strategy by which customers are offered discounted energy efficient lighting products. As a result of these program activities, SCE has achieved approximately 40,165 megawatt-hours (MWh) of net annualized energy savings and 7 megawatts (MW) of net demand reductions during the first quarter of 2001.

Nonresidential

To maximize energy and demand savings, SCE has made a number of significant programmatic changes to the nonresidential portfolio. One of the most significant changes is the expansion of customer eligibility to large customers under the Express Efficiency rebate program. SCE has also continues its very successful Summer Initiative LED traffic signal rebate offering through Express Efficiency. Also through Express Efficiency, SCE has implemented "Blitz" initiatives promoting specific measures (e.g., window film) targeted to the smaller business customers. The Standard Performance Contract program requirements were also modified to simplify the application process, which now includes measurement and verification as an optional feature. As a result of these program modifications, SCE has achieved approximately 154,124 MWh of

net annualized energy savings and 37 MW of net demand reductions during the first quarter of 2001.

New Construction

In 2001, SCE has significantly increased funding in the residential and nonresidential new construction sector. In the residential new construction market, SCE continues to offer incentives to homebuilders to encourage them to build Energy Star qualified homes. SCE has also implemented a manufacturer incentive program which encourages air conditioning distributors to sell higher efficient units to builders at reduced prices. In the nonresidential market, SCE continues to offer the very successful Savings By Design program. Although the new construction activities have a much longer lead-time before energy savings are realized, these programs capture significant lost opportunities. Nevertheless, in the first quarter of 2001, these programs have achieved approximately 5,230 MWh of net annualized energy savings and 1 MW of net demand reductions.

Statewide and Crosscutting

SCE, along with other investor-owned utilities, continue to coordinate programs on a statewide basis. However, for 2001, key strategies are being employed under the statewide programs by various utilities, including SCE, that are uniquely designed to optimize energy and demand savings. For SCE, some of these strategies include “Blitz” initiatives for small businesses, expansion of the LED traffic signal rebate offering, and the inclusion of large customers in the Express Efficiency rebate program.

Under the crosscutting programs, SCE initiated a third party solicitation process in November 2000. SCE believed this early solicitation would provide winner bidders the maximum potential time to implement their initiatives. By the end of March, ten winning bidders had been notified of their selection and invited to begin working on their project plans. In addition, four previously awarded third party initiative projects were selected for additional funding.

In light of the renewed focus on immediate energy and demand savings, SCE has also reduced its funding for the promotion of energy efficient emerging technologies. Nevertheless, SCE is committed to the continued promotion of such technologies and, to that end, will continue to participate in the Emerging Technologies Coordinating Counsel with other industry leaders. SCE will also promote a limited number of technology showcases during 2001.

Market Assessment and Evaluation

In response to Decision 01-01-060 issued by the California Public Utilities Commission, SCE, along with the other utilities, revised the utility-specific portion of its 2001 Market Assessment and Evaluation Plan, posted it on the CALMAC website, and participated in a CALMAC-sponsored public workshop to review the plans. SCE’s plan was then revised based on workshop discussion and submitted to the Commission in early March. The California Energy Commission’s revised plan for 2001 studies was submitted along with SCE’s plan.

Two statewide studies were completed and distributed in first quarter 2001: the Large Customer Wants and Needs Study and the Evaluation of the 1999 Large Customer Standard Performance

Contracting Program. Two utility-specific studies were also completed. One was a study of the 1999 and 2000 implementation rates of measures and actions recommended by the small business do-it-yourself energy audit program. The other was a study mandated by the California Public Utilities Commission to assess the potential of a room air conditioner recycling program. Numerous other studies reached new progress milestones during the quarter, as denoted in the detailed tables of MA&E projects.

Summer Initiative

In 2001, SCE continues to oversee various offerings under the Summer Initiative implemented during 2000. These Summer Initiatives include: Residential Refrigerator Recycling, Pool Efficiency Program, selective third party initiatives, LED Traffic Signal Rebate Program, Campus Energy Efficiency Project, Hard To Reach Program, Beat The Heat, and California Oil Producers Electric Cooperative. By the end of the first quarter 2001, the Summer Initiatives had installed or committed over 80,000 MWh of annualized energy savings and 38 MW of demand reduction.

Section 2: Residential Program Area

Southern California Edison Company's residential programs promote the use of energy-efficient measures by consumers. The specific programs include: Residential Heating and Cooling, Residential Lighting, and Residential Appliances and Residential Retrofit and Renovation.

Residential Heating & Cooling Systems

(for detail see A.00-11-043, p. C-5)

SCE's Residential Heating & Cooling Systems program consists of a comprehensive, coordinated set of strategies focused largely on increasing homeowner awareness of energy efficiency opportunities. Energy and cost savings in this market are achieved through: (1) increased availability and promotion of higher efficiency equipment at the time of equipment replacement by suppliers; (2) reductions in the search costs of customers in the market for efficient replacement equipment; (3) improved equipment sizing and installation practices, particularly for central air conditioners and heat pumps; and (4) ongoing proper operation and maintenance of HVAC systems.

Program Elements

ELEMENT NAME	ELEMENT ACTIVITY
Residential Audits	See below
CHEERS	See below
Mass Market Information	See below
Emerging Technologies	See Crosscutting Programs
CTAC/AGTAC Energy Centers	See Crosscutting Programs
Third Party Initiatives	See Crosscutting Programs

Residential Audits

(for detail see A.00-11-043, p. C-7)

Program Element Summary

Residential energy surveys take various forms such as mail-in, in-home, phone, or online and provide customers (including moderate income) or their children (e.g., school-based audits) with energy efficiency information to help them reduce their energy bills. The surveys also provide a segue for offering other energy efficiency products and services such as residential rebates and retail outlets that feature ENERGY STAR[®] qualified products. Marketing and promotion strategies include the ENERGY STAR[®] Mobil Education Unit, e-mail promotions, direct mail, bill messages or inserts, print media advertising, Internet, local governments, phone centers, and ethnic, trade, and community associations.

In light of the immediate need to reduce energy consumption by all customers and including residential, SCE expects to see greater demand for energy surveys especially for in-home surveys. Faced with this greater demand, SCE will aggressively promote its on-line survey so to allow many more customers to participate in the program.

Activities, Accomplishments, Market Progress, & Modifications

- SCE plans to aggressively promote the online survey during 2001. The primary elements of this strategy include: 24-hour Internet access to an energy survey that provides immediate energy efficiency opportunities for the home; distribution of other energy efficiency product and program material to residential customers; and development of various print and internet ads, scripts for phone center personnel, or presentations for associations.
- SCE conducted mailing campaigns to 80,000 customers promoting Mail-In and In-Home surveys in January. A second mailing is planned for both surveys in April.
- The mailing brochures for the In-Home audit are being updated to more adequately reflect the current energy environment and will be used for the April In-Home mailing.
- Plans are underway to incorporate the 20/20 Summer Program into the Online Survey enhancements.

The results from SCE residential audits for the first quarter are:

Survey	Completed Audits
In-Home	1,991
Mail-In	5,578
Phone	646
Online	1,086

- SCE’s Green Schools activity continued to work with teachers, maintenance personnel and administrators from three school districts (k-12), as well as representatives from a Regional Occupational Program (ROP), which supports 17 school districts. All training was completed for several high school students to become energy auditors at their school sites. At least two of the high school teams and the ROP presented their energy audit findings of their schools to their School Boards, which were positively received.
- Historically, students from the ROP build a home each year to learn construction trades. The home is then sold by a local city for profit. This year, for the first time because of SCE’s Green Schools' involvement, the students will build an energy-efficient home. Meetings took place to solidify the work plan for filming the energy efficient home. For this project, funds will be sought from the Department of Energy and other vested parties.
- Energy conservation kits are continuing to be offered to students through school year 2000 – 2001 and has been well received by all participating in the program.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$1,400

Revised: \$1,400

Residential - California Home Energy Efficiency Rating System Program

(for detail see A.00-11-043, p. C-13)

Program Element Summary

This program supports the California Home Energy Efficiency Rating System (CHEERS), which is a nonprofit, home energy rating service currently offered to the residential retrofit market. Owners of existing homes can obtain a CHEERS rating for a subsidized fee that will evaluate the current energy efficiency of the home. CHEERS will then make recommendations on cost-effective ways, for the buyer or seller, to improve the efficiency of the home and will link the homeowner to beneficial financing via an energy-efficient mortgage (EEM). Additionally, CHEERS offers a variety of audit and energy evaluation tools for the existing home, that are not as comprehensive as the traditional CHEERS rating, but provides a wealth of information to the homeowner.

Activity, Accomplishments, Market Progress, & Modifications

- Performed over 50 traditional CHEERS ratings; completed over 300 Energy Wizards (in support of the In-Home Audit program).
- Conducted one New Construction training session and two Lender training sessions.
- In support of the new residential energy standards created by AB 970, CHEERS recruits, trains, and certifies individuals to perform third-party verification (duct testing, etc.) which required by the new standards if the builder opts to use the CEC's HVAC credit. Currently, CHEERS is the only state-certificated provider for this type of verification.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$300

Revised: \$300

Mass Market Information

(for detail see A.00-11-043, p. C-16)

Program Element Summary

Residential Mass Market Information is energy efficiency information and an education program designed to give customers the power to better manage their home energy costs. The program provides general energy efficiency information to customers and other market actors through the following intervention strategies: Internet, statewide energy guide, ENERGY STAR[®] Mobile Education Unit, coordination with local governments, and an energy efficiency awareness campaign during summer peak months.

SCE plans to implement a two-page "Quick Tips" energy guide that will include suggestions on how customers can conserve energy usage along with references to energy efficiency programs available to them. These revised energy guides will be available in English, Spanish, Korean, Chinese, and Vietnamese.

Activity, Accomplishments Market Progress, & Modifications

- Awareness of the Residential Energy Guides included a bill insert reaching 3.6 million residential customers and advertisement on SCE's website with a direct link to order and actually view the Energy Guide.
- Distribution to community-based and trade/ethnic organizations included: Latin Business Association, Food Industry Business Roundtable, San Gabriel Valley Hispanic Chamber of Commerce, San Gabriel Valley Economic Partnership, County of Los Angeles Department of Health Services Bureau of Compliance Assistance, KFWB Radio 98, NTD Institute (legal organization for immigrants), Women's Economic Development, Pacific Coast Regional Small Business Development Corporation, California Economic Development Lending Initiative, Community Finance Resource Center, West Angeles Community Development Corporation, FAME Renaissance, Boys and Girls Clubs, YMCA.
- Distributed to libraries, city halls, and other community-based organizations in cities with high Chinese population.
- Distributed to various Chambers of Commerce in over 30 cities, small newspapers and magazine services like Mid Valley News and Spanish Weekly Magazine and TV Guide.
- Outreach in the first quarter included 61 visits by the ENERGY STAR[®] Mobile Education Unit (MEU) where customers learned about energy efficiency and were able to obtain a copy of the Energy Guide. A total of 12,756 customer contacts were recorded in the first quarter. In the month of March, 395 customer surveys were taken. While 52 percent of customers surveyed had not heard of the ENERGY STAR[®] label, 96 percent were more likely to purchase ENERGY STAR[®] qualified products after their visit to the MEU.
- Other delivery channels for distribution included Edison's Phone Centers.
- Residential Energy Guides distributed during the first Quarter: 11,500 English; 3,200 Chinese; and 6,000 Spanish. Commercial Energy Guides distributed during the first Quarter: 12,000 English; 600 Chinese; and 12,000 Spanish.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$1,250

Revised: \$2,615*

*includes Consumer Affairs Agency's statewide media campaign.

Residential Lighting

(for detail see A.00-11-043, p. C-17)

SCE's Residential Lighting program seeks to transform specific components of the market for residential lighting products through a coordinated set of program elements. The program's integrated efforts build consumer awareness and market demand for energy-efficient lighting products by working with the supply side of the product chain to make efficient lighting products more readily available to consumers.

Program Elements:

ELEMENT NAME	ELEMENT ACTIVITY
Residential Lighting	See below
Residential Audits	See Residential Heating & Cooling Systems Program
Mass Market Information	See Residential Heating & Cooling Systems Program
CHEERS	See Residential Heating & Cooling Systems Program
CTAC/AGTAC Energy Centers	See Crosscutting Programs
Third Party Initiatives	See Crosscutting Programs

Residential Lighting

(for detail see A.00-11-043, p. C-19)

Program Element Summary

The Residential Lighting Program seeks to transform the market for residential lighting products through a comprehensive set of market interventions that are coordinated statewide. The program focuses on three main areas: (1) enhancing the manufacture and competitive pricing of high quality energy-efficient lighting products; (2) enhancing the distribution and marketing of energy-efficient lighting products through established retail channels to consumers; and (3) building consumer understanding of how to purchase and use energy-efficient lighting products.

For 2001, SCE has placed less emphasis on retailer training and education and has significantly increased financial incentives to manufacturers to immediately reduce the price of energy efficient lighting products to residential customers.

Activity, Accomplishments, Market Progress, & Modifications

- SCE asked approximately 200 manufacturers to participate in energy efficient lighting buy-down program. As a result of these efforts with lighting manufacturers to buy down the cost of energy-efficient lighting products, customers will receive a \$3 discount per unit off the purchase price of ENERGY STAR[®] qualified compact fluorescent lamps (CFLs), and a \$10 discount per unit for a torchiere or hardwired indoor/outdoor lighting fixtures.

- The program was fully subscribed by March 15th, 2001.
- As of the first quarter of 2001, the following products were available at:
 - Costco: shipped 79,500 CFLs March 23rd, completely sold out (35 stores in service territory).
 - Wal Mart: shipped 8,000 CFLs March 23rd, nearly sold out (42 stores in service territory).
 - Sam's Club: shipped 7,500 CFLs March 23rd, nearly sold out (17 stores in service territory).
- SCE also has agreements with four other retailers who will ship qualifying products to their stores during the second quarter as follows:
 - Lowe's: shipped 25,000 CFLs April 6th, nearly sold out (13 stores in service territory).
 - Long's Drugs: shipped 10,000 CFLs by April 6th (50 stores in service territory).
 - Home Depot: will ship 30,000 CFLs by April 18th, with another 30,000 by May 1st (65 stores in territory).
 - Albertson's: will ship 10,000 CFLs by May 1st

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$2,450
 Revised: \$3,200

Residential Appliances

(for detail see A.00-11-043, p. C-24)

SCE's Residential Appliances program seeks to transform specific components of the market through a comprehensive and coordinated set of market interventions. The program is comprised of upstream and downstream marketing and financial incentives. These efforts provide consumers who are making planned or emergency replacement appliance purchases with information on the economic and environmental benefits of purchasing energy-efficient equipment. SCE's program promotes the ENERGY STAR[®] label, and helps consumers identify sources for ENERGY STAR[®] products.

Program Elements:

ELEMENT NAME	ELEMENT ACTIVITY
Residential Refrigerator Recycling	See below
Residential Appliance	See below
Residential Home Efficiency Rebate	See below
Residential Audits	See Residential Heating & Cooling Systems Program
Mass Market Information	See Residential Heating & Cooling Systems Program
CHEERS	See Residential Heating & Cooling Systems Program
CTAC/AGTAC Energy Centers	See Crosscutting Programs
Third Party Initiatives	See Crosscutting Programs

Residential Refrigerator Recycling

(for detail see A.00-11-043, p. C-26)

Program Element Summary

Early Retirement and Recycling - educates and provides direct incentives to consumers for eliminating highly inefficient refrigerators and freezers from the market place.

Activity, Accomplishments, Market Progress, & Modifications

- A key program change for 2001 includes a compact fluorescent bulb incentive where customers can choose either the \$35 incentive or a 5-pack of compact fluorescent bulbs (CFBs) worth \$50. This new incentive strategy was implemented on March 1st. To date, about 10% of the customers are taking advantage of the CFB incentive. This is significant in that it will add to the energy savings for the refrigerators and freezers recycled.
- A new program design feature for 2001 will include an outreach to multi-family owners or landlords to encourage recycling of old refrigerators instead of placing them in the secondary resale marketplace. SCE is working with multi-family property owners to determine how the program should be designed to maximize their participation.
- As of the First Quarter of 2001 the program recycled 11,633 refrigerators and freezers.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$7,500

Revised: \$7,500

Residential Appliance

(for detail see A.00-11-043, p. C-29)

Program Element Summary

The Residential Appliance program will continue to seek to transform the market for residential appliances through a comprehensive set of market interventions that are coordinated statewide. This program is designed to increase the purchase and availability of ENERGY STAR[®] qualified refrigerators and room air conditioners.

The overall strategy for achieving its mission is to create an active functioning market in which all market actors understand the benefits of energy-efficient appliances and consider them properly when making purchasing decisions. The program will promote ENERGY STAR[®] room air conditioners and refrigerators in conjunction with upcoming changes in appliance standards (July 2001) and SCE's Home Efficiency Rebate program.

Based on experience gained from 2000 program implementation and in-store promotions, SCE will rely on agencies such as community-based organizations and other outreach strategies to assist retailers with in-store promotions.

Activity, Accomplishments, Market Progress, & Modifications

- SCE has developed a request for proposal to allow manufacturers and retailers the flexibility in developing individualized in-store advertising and promotional activities tailored to their particular customer groups. It is expected that this added flexibility will provide greater promotion of ENERGY STAR[®] appliances.
- Advertising and promotional efforts to increase consumer awareness will involve featuring story releases about ENERGY STAR[®] appliances in the editorial sections of newspapers.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$625

Revised: \$250

Residential Home Efficiency Rebate

Program Element Summary

With the increasing focus on providing "Californians with opportunities to control energy usage and reduce consumption" resulting in energy savings, the Home Efficiency Rebates (HER) program was redesigned for 2001. HER, modeled after the Express Efficiency Program, provides financial incentives directly to consumers who purchase and install a number of energy-efficient appliances and products.

To maximize the number of participating customers, rebates for single-family homes previously offered by the Residential Contractor Program have been transitioned to HER program. This program, a joint venture between SCE and Southern California Gas Company, makes available financial incentives for both energy-efficient gas and electric products.

Measures in HER include:

- ENERGY STAR[®] qualified Central Air Conditioner
- ENERGY STAR[®] qualified Central Heat Pump
- ENERGY STAR[®] qualified Gas Furnace
- Variable Speed Drive Gas Furnace
- ENERGY STAR[®] qualified Thermostat
- Efficient Gas Water Heater
- Attic Insulation
- Wall Insulation
- High Performance Windows
- Whole House Fan
- Evaporative Cooler
- ENERGY STAR[®] qualified Room Air Conditioner
- 2.0 gpm Showerhead
- Water Heater Pipe Insulation
- 2001 Federally Compliant Refrigerators and 2001 ENERGY STAR[®] Refrigerators

Activity, Accomplishments, Market Progress, & Modifications

- The program was implemented on February 23, 2001.
- The 2001 First Quarter results included 3,537 customer reservations representing 3,724 energy efficiency measures totaling nearly \$0.650 million of incentive dollars.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$1,440

Revised: \$4,003

RESIDENTIAL RETROFIT & RENOVATION

(for detail see A.00-11-043, p. C-35)

SCE's Residential Retrofit & Renovation program seeks to transform efficiency markets by simultaneously increasing market demand for energy efficiency services, strengthening service capability, and supporting introduction of new energy service products. An integrated program to address this market offers the potential of being more efficient, synergistic and effective than a combination of programs defined by end-users, technologies or intervention strategies.

Program Elements:

ELEMENT NAME	ELEMENT ACTIVITY
Residential Contractor	See below
Residential Audits	See Residential Heating & Cooling Systems Program
Mass Market Information	See Residential Heating & Cooling Systems Program
CEEREEE	See Residential Heating & Cooling Systems Program
CHEERS	See Residential Heating & Cooling Systems Program
Emerging Technologies	See Crosscutting Programs
CTAC/AGTAC Energy Centers	See Crosscutting Programs
Third Party Initiatives	See Crosscutting Programs

Residential Contractor

(for detail see A.00-11-043, p. C-37)

Program Element Summary

The Residential Contractor Program (RCP) features two distinct elements: Single-Family (SF-RCP) and Multifamily (MF-RCP).

Single-Family Element. The SF-RCP applies to single-family homes, condominium dwelling units, small-attached apartments (e.g., duplex, four-plex) and mobile homes. The element promotes heating, ventilating, and air conditioning (HVAC) services, and delivers the program through contractors approved for the program.

Multifamily Element. The MF-RCP applies to apartment dwelling units, and common areas of mobile home parks, condominiums and apartment complexes. The element is designed to foster energy efficiency improvements, using a performance-based standard performance contract offering similar to the Small Business Standard Performance Contract program.

Activity, Accomplishments, Market Progress, & Modifications

In February, SF-RCP was modified to allow the maximum number of state licensed contractors to participate in energy efficiency programs. All measures offered in the 2000 RCP Single Family element, except AC/HP Diagnostic & Tune-up, Duct Testing and Duct Sealing have transitioned to SCE's Home Efficiency Rebate program, payable to directly to customers through

that program. Screening and training requirements remain in place for HVAC contractors offering RCP diagnostics and duct sealing.

The incentive structure has been revised for RCP measures. Duct tests and duct sealing are tiered: one tier for single-family homes and one tier for mobile homes. The duct sealing incentive, increased over 2000 levels, is \$200 for single-family homes and \$150 for mobile homes. The duct test incentive is \$50 for single-family homes and \$25 for mobile homes.

The MF-RCP is currently utilizing RCP 2000 program guidelines and procedures. Application modifications to make the process easier are being considered.

2001 First Quarter Results:

- RCP-SF incentive commitments/paid are approximately 54% of the RCP-SF budget and the RCP-MF budget commitment is 9% for the period of January 3 through March 31.
- RCP-SF customer vouchers total 9,102 and RCP-MF customer sites total 32.

Program Element Budget (\$000), Excluding General Support Activities:

RCP-SF

Authorized: \$5,939

Revised: \$2,669

RCP-MF

Authorized: \$2,439

Revised: \$2,148

Section 3: Nonresidential Program Area

Southern California Edison Company's nonresidential programs include: Small Nonresidential Comprehensive Retrofit; Large Nonresidential Comprehensive Retrofit; Nonresidential HVAC Equipment Turnover; Nonresidential Motor Turnover; Nonresidential Process; and Nonresidential Renovation & Remodeling. These programs are designed to: improve the level of retrofit energy-efficient investments in small and large commercial, industrial and agricultural end-users; transform the market for new HVAC equipment and replacement motors, increase the level of energy efficiency process overhauls; and increase the level of energy efficiency investment in the nonresidential remodel market.

Small Nonresidential Comprehensive Retrofit

(for detail see A.00-11-043, p. D-5)

The Small Nonresidential Comprehensive Retrofit program is designed to increase the level of retrofit efficiency investments among small commercial, industrial, and agricultural end-users. The program's elements target distinct opportunities in the retrofit market arising from predominant end-uses among small customers.

Program Elements

ELEMENT NAME	ELEMENT ACTIVITY
Small Business Energy Survey	See below
Small/Medium Energy Management Services	See below
Small Nonresidential Mass Market Info.	See below
Agricultural/Pumping Services	See below
Express Efficiency	See below
Sm/Med Nonresidential Standard Performance Contract	See below
Small Business Pilot-Space Rental Upgrade	See below
Emerging Technologies	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs
Third Party Initiative	See Crosscutting Programs

Small Business Energy Survey

(for detail see A.00-11-043, p. D-9)

Program Element Summary

The Small Commercial/Industrial Do-It-Yourself Energy Survey, available in various forms such as hardcopy, on-line, and CD ROM, and provides customers with energy efficiency information to help them reduce their energy bills. The surveys also provide an opportunity to introduce other energy efficiency products and services, such as small commercial/industrial rebates and retail outlets that feature ENERGY STAR[®]-rated products.

Activities, Accomplishment, Market Progress, & Modifications

- Completed the on-line version of the small commercial/industrial do-it-yourself energy survey, called the Business Energy Analysis tool.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$350

Revised: \$335

Small/Medium Energy Management Services

(for detail see A.00-11-043 p. D-11)

Program Element Summary

This program element is designed to augment other utility program elements which serve the nonresidential market by providing special services to serve the “under served” market segment which include minority and women owned businesses. This includes:

- Promoting awareness of energy efficiency and its benefits to businesses and to specific customer trade and ethnic associations and their members. Specific targeted marketing to agricultural customers and convenience stores will be included.
- Cultivate relationships between vendors and traditionally “hard-to-reach” small business market sub-segments (e.g., non-English primary language, etc.)

Activities, Accomplishment, Market Progress, & Modifications

- The demand for individualized in-business energy audits has increased dramatically in 2001 due to billing and reliability concerns. A total of 165 visits were made to small businesses during the first quarter, which equates to an estimated 40% of the total 2000 accomplishment. A dramatic increase in audit request is expected this summer.
- A total of 27 presentations to trade associations and other customer groups (ethnic, and other underserved markets) were completed.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$350

Revised: \$350

Small Nonresidential Mass Market Information

(for detail see A.00-11-043 p. D-14)

Program Element Summary

The Energy Guide, “Smarter Business Energy Use: Saving Energy & Money”, is an energy information and education tool designed to give customers information that will empower them to better manage their business energy costs.

SCE plans to implement a two-page “Quick Tips” energy guide that will include suggestions on how customers can conserve energy usage along with references to energy efficiency programs

available to them. These revised energy guides will be available in English, Spanish, Korean, Chinese, and Vietnamese. SCE will pilot the use kiosks for the distribution of the energy guides along with other delivery methods currently employed by SCE. SCE will also publish energy fact sheets on lighting, motors, HVAC, office equipment, and other energy efficiency information.

Activities, Accomplishment, Market Progress, & Modifications

- Completed the revisions to the new “Quick Tips” energy guide for 2001.
- Initiated the translation of the new “Quick Tips” energy guide into Spanish, Chinese, Korean, and Vietnamese.
- Completed the draft of eight technical briefs. These technical briefs inform the customer as to the performance of selected new technologies that can save money. The customer is then walked through a set of simple calculations to help him determine the payback period for implementing the technology.
- Completed the contract for the design, manufacture, emplacement and servicing of 75 – 100 kiosks throughout the Southern California Edison service territory. These kiosks will be placed in high traffic areas targeting both residential and business customers. Special efforts are underway to identify locations that will achieve reaching the “hard to reach” portions of the community.
- Distributed a total of 24,600 copies (12,000 English, 600 Chinese, and 12,000 Spanish) of the energy guide.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$540

Revised: \$1,413*

*includes Consumer Affairs Agency’s statewide media campaign.

Agricultural/Pumping Services

(for detail see A.00-11-043 p. D-15)

Program Element Summary

The Agricultural/Pumping Services program element is intended to influence water agencies, municipalities, agricultural, and other pumping customers to adopt preventative maintenance practices that should ultimately improve the overall efficiency of their pumping systems. This objective is accomplished through hydraulic test specialists who provide pump efficiency tests that determine overall plant system efficiency, electrical motor performance, pump hydraulics and water well characteristics.

Activities, Accomplishment, Market Progress, & Modifications

- Contacted over 120 agricultural/pumping customers, which resulted in nearly 800 pumps test and/or inspected.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$2,100

Revised: \$2,100

Nonresidential Express Efficiency

(for detail see A.00-11-043 p. D-18)

Program Element Summary

The Nonresidential Express Efficiency program educates and provides direct incentives to all nonresidential customers (i.e., small, medium, and large customers) for the elimination of specific highly inefficient electrical products from use in their businesses. Express Efficiency for 2001 includes an expanded choice of measures with the lighting, HVAC and refrigeration end-uses. During 2001, SCE may expand this measure list to capture more energy savings within these end-uses. The program uses a combination of customer representatives, vendors and contractors to delivery the program to the nonresidential customers. The program also includes rebates on LED traffic signals to cities and governmental agencies. For small business customers, SCE has added “blitz” initiative that focus on delivering specific measures (e.g., window film) to targeted small business segments and climate zones.

Activities, Accomplishment, Market Progress, & Modifications

- The LED Traffic Signal Rebate program is fully committed at \$3.3 million with over 40 cities enrolled.
- SCE conducted the Express Efficiency contractor/vendor kickoff event. The event was well received by vendors with 175 local vendors in attendance.
- Nearly \$2.7 million in financial incentives were committed to customers with the majority of the customer projects focused on the installation of energy efficient lighting systems.

Program Element Budget (\$000), Excluding General Support Activities:

Small/Medium Express

Authorized: \$6,433

Revised: \$9,670

Large Express

Authorized: \$0

Revised: \$4,455

Small/Medium Nonresidential Standard Performance Contract Program

(for detail see A.00-11-043 p. D-8)

Program Element Summary

The Small Business Standard Performance Contract (SBSPC) program is a performance-based retrofit program that offers financial incentives for energy efficiency measures that deliver verified energy savings at small and medium (under 500 kW demand or 250,000 annual therm usage) commercial, industrial and agricultural customer facilities. Financial incentive rates, performance measurement protocols, payment terms, and all other operating rules of the program are specified in the program procedure manual or on the utilities websites.

In response to the need to achieve immediate energy savings during 2001, SCE has incorporated the planned Small Business Pilot – Space Rental Update offering into the already existing 2001 SBSPC. To this end, SBSPC will promote the implementation of weatherization measures in the market of strip malls and commercial tenants.

Activities, Accomplishment, Market Progress, & Modifications

- 50 applications were received representing approximately 50% of the program incentive budget.
- When the total dollar value of all applications received reaches 110% of the authorized budget, additional applications will be placed on a wait list in the event that additional funding is authorized by the CPUC.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$0*

Revised: \$1,980

*SCE had originally proposed in its 2001 program application to the CPUC combining Small and Large SPC into one SPC program offering.

Large Nonresidential Comprehensive Retrofit

(for detail see A.00-11-043 p. D-20)

The Large Nonresidential Comprehensive Efficiency Retrofit program is designed to increase the level of retrofit efficiency investments involving large commercial, industrial, and agricultural end-users. An integrated approach combining early replacement and supplemental measures across related end-uses will maximize benefits and minimize costs. The program's elements target distinct opportunities in the retrofit market arising from predominant commercial, industrial, and agricultural end-uses: HVAC, lighting, motor-drive systems, and process applications. The program includes an array of intervention strategies at critical points in the decision-making process for retrofit efficiency transactions.

Program Elements

ELEMENT NAME	ELEMENT ACTIVITY
Large Nonresidential Standard Performance Contract	See below
Commercial Energy Efficiency Info. Svcs.	See below
Industrial Energy Efficiency Info. Svcs.	See below
Express Efficiency	See Small Nonres. Comp. Retrofit
Agricultural/Pumping Services	See Small Nonres. Comp. Retrofit
Emerging Technologies	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs

Large Standard Performance Contract

(for detail see A.00-11-043 p. D-24)

Program Element Summary

The Large Nonresidential Standard Performance Contracting (LNSPC) program is a statewide performance-based retrofit program that offers incentives for energy efficiency measures that deliver verified energy savings at commercial, industrial, and agricultural customers facilities. The program is a "standard offer" consisting of payment of a fixed-price incentive by the utility administrator to end users or third-party EESPs in exchange for measured kilowatt-hour (kWh) energy savings achieved by the installation of an energy efficiency project at a host customer facility.

Activities, Accomplishment, Market Progress, & Modifications

- 57 applications were received fully subscribing the LNSPC 2001 incentive budget. A Wait List has been created, and subsequent applications will be placed on the Wait List, pending the authorization of additional funding.
- SCE has also committed \$0.066 million in peak demand reduction incentives.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$15,750

Revised: \$5,027

Commercial Energy Efficiency Information Services

(for detail see A.00-11-043 p. D-25)

Program Element Summary

The Commercial Energy Efficiency Information Services (Commercial EEIS) program element is designed to produce a permanent change in how commercial customers make decisions about equipment purchases and operational practices. This is accomplished by educating them through direct contact where discussions center on evaluating energy choices. For 2001, SCE has implemented a “Beat the Peak” offering that encourages customers to reduce peak load reduction. A certificate is presented to those customers who promise to reduce peak energy usage during 2001.

Activities, Accomplishment, Market Progress, & Modifications

- Nearly 1,000 commercial customers were contacted to promote energy efficiency programs such as SPC and Express Efficiency.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$350

Revised: \$575

Industrial Energy Efficiency Information Services

(for detail see A.00-11-043 p. D-27)

Program Element Summary

The Industrial Energy Efficiency Information Services (Industrial EEIS) program element is designed to produce a permanent change in how industrial customers make decisions about equipment purchases and operational practices. This program element seeks to alter the industrial customers’ mindset and elevate the importance of educating customers on how to make more informed energy choices. For 2001, SCE has implemented a “Beat the Peak” offering that encourages customers to reduce peak load reduction. A certificate is presented to those customers who promise to reduce peak energy usage during 2001.

Activities, Accomplishment, Market Progress, & Modifications

- Nearly 600 commercial customers were contacted to promote energy efficiency programs such as SPC and Express Efficiency.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$350

Revised: \$575

Nonresidential HVAC Equipment Turnover

(for detail see A.00-11-043 p. D-31)

The Nonresidential HVAC Turnover program seeks to transform the market for new heating, ventilation, and air-conditioning equipment. As existing equipment nears or reaches the end of its useful life, the program attempts to influence the decision-making process used by buyers and sellers of equipment purchased and installed through the normal replacement cycle. The program seeks to raise the efficiency level of equipment specified and selected by engineers, vendors, and contractors for end-users. Also, the program will attempt to stimulate market adoption of high-efficiency controls, optimal equipment sizing, and high-efficiency operation, and maintenance practices.

Program Elements

ELEMENT NAME	ELEMENT ACTIVITY
Nonresidential Upstream HVAC Pilot	See below
HVAC Commissioning Pilot Program	See below
Standard Performance Contracting	See Large Nonres. Comprehensive Retrofit
Industrial Energy Efficiency Info. Svcs.	See Large Nonres. Comprehensive Retrofit
Com'l. Energy Efficiency Info. Svcs.	See Large Nonres. Comprehensive Retrofit
Express Efficiency	See Small Nonres. Comp. Retrofit
Emerging Technologies	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs
Third Party Initiative	See Crosscutting Programs

Nonresidential Upstream HVAC Pilot

(for detail see A.00-11-043 p. D-34)

Program Element Summary

The Nonresidential Upstream HVAC Pilot (Upstream HVAC) seeks to transform the market for nonresidential central air conditioners (a/c) and central heat pump units through an upstream financial incentive strategy for HVAC installation contractors. At the point of the equipment replacement market event, the program focuses on creating a “market pull” condition to increase penetration rates of a/c units at least one EER above Title 24 building codes, installed at small and medium nonresidential customer locations. The term “small and medium” is defined as under 500 kW demand.

The program element has two main areas of focus: (1) utilization, for the program’s advantage, of the historic business practices employed in the commercial HVAC equipment distribution channel; and (2) HVAC contractor-directed and assisted customer selection of high efficiency and premium efficiency central air conditioning units over standard efficiency units in emergency replacement and planned replacement opportunities.

For 2001, the program offers air conditioning contractors a “Quick Start Bonus” to assist in the promotion of energy efficient central a/c and heat pumps at the time of purchase. The customer

rebates are channeled through the Express Efficiency Program. This shifting of the customer rebate from the Nonresidential Upstream HVAC Program is a strategic modification that took place this year.

Activities, Accomplishment, Market Progress, & Modifications

- Direct mailings of promotional literature were sent to 500 air conditioning contractors. This represents about one quarter of the staggered mailings planned for the year to promote the Quick Start Bonus, a contractor incentive.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$250

Revised: \$70*

* - incentives offered through Express Efficiency.

Nonresidential Motor Turnover

(for detail see A.00-11-043 p. D-39)

The Motor Turnover program targets intervention strategies at manufacturers, distributors, vendors, and end-users to stimulate demand and supply for premium-efficiency motors, pumps, and fans, high-efficiency motor controls, and optimal motor sizing and application. While all nonresidential end-users are eligible, the primary end-user segments are industrial and agricultural.

Program Elements

Element Name	Element activity
Nonresidential Upstream Motors Pilot	See below
Large Standard Performance Contracting	See Large Nonres. Comprehensive Retrofit
Comm'l. Energy Efficiency Info. Svcs.	See Large Nonres. Comprehensive Retrofit
Ind. Energy Efficiency Info. Svcs	See Large Nonres. HVAC Equip. Turnover
Agricultural/Pumping Services	See Large Nonres. Comprehensive Retrofit
Emerging Technologies	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs

Nonresidential Upstream Motors Pilot

(for detail see A.00-11-043 p. D-41)

Program Element Summary

The Nonresidential Upstream Motor Pilot program element (Upstream Motors) seeks to transform the market for premium efficiency three phase electric motors. This program element seeks to sustain long-term market effects by both adapting to, and changing certain industry practices and attitudes pertaining to the distributors' method of motor acquisition, stocking, ready availability and final sale of premium efficiency electric motors through traditional motor distribution channels. Upstream Motors will be accomplished through an upstream financial incentive strategy for non-OEM motor distribution channel members to encourage stocking of qualifying motors.

Activities, Accomplishment, Market Progress, & Modifications

- Influenced 19 contractors to surpass SCE instituted sales quotas for 2001.
- Processed the sale of 203 motors to SCE nonresidential customers.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$550
Revised: \$330

Nonresidential Process

(for detail see A.00-11-043 p. D-48)

This program is designed to increase the level of energy-efficient process overhauls on the part of commercial, industrial, and agricultural users. While the technical opportunities and constraints are distinct among commercial, industrial, and agricultural processes, the intervention strategies targeting barriers to energy-efficient choices are similar in all three elements.

Program Elements

ELEMENT NAME	ELEMENT ACTIVITY
Large Standard Performance Contracting	See Large Nonres. Comprehensive Retrofit
Ind. Energy Efficiency Info. Svcs	See Large Nonres. HVAC Equip. Turnover
Agricultural/Pumping Services	See Small Nonres. Comprehensive Retrofit
Emerging Technologies	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs

Nonresidential Renovation & Remodeling

(for detail see A.00-11-043 p. D-53)

The Commercial Remodeling/Renovation program seeks to increase the level of investment in energy efficiency equipment and strategies in existing buildings during nonresidential remodels and renovations. A mix of intervention strategies, each appropriate to specific circumstances, will provide energy efficiency opportunities to all customer classes pursuing facility renovation, remodel, alteration, rehabilitation, modernization, broad-scope and first time tenant improvement, and tenant change, etc. Because the preceding phrases have specific meaning to some stakeholders but are used interchangeably by others, this interpretation proposes that the broadest range of facility upgrade activities are understood to be included in this program area.

Program Elements

ELEMENT NAME	ELEMENT ACTIVITY
Savings By Design	See below
Express Efficiency	See Small Nonres. Comprehensive Retrofit
Large Standard Performance Contracting	See Large Nonres. Comprehensive Retrofit
Comm. Energy Efficiency Info. Svcs.	See Small Nonres. Comprehensive Retrofit
Ind. Energy Efficiency Info. Svcs	See Large Nonres. Comprehensive Retrofit
Emerging Technologies	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs

Savings By Design

(for detail see A.00-11-043 p. D-55)

Program Element Summary

Savings By Design is a program offering that promotes high performance nonresidential building remodeling and renovation. The program element encourages the reconstruction of energy-efficient buildings and the process seeks to permanently reduce the transaction costs associated with developing and evaluating energy-efficient design alternatives. Savings By Design will improve the comfort, efficiency, and performance of buildings by promoting an integrated team approach to design. The program provides direct benefits to all market actors and market segments, including building owners – large or small, public or private, occupant or developer – and design professionals involved in building remodeling and renovation.

Activities, Accomplishment, Market Progress, & Modifications

Minor modifications to the program were made to allow for more effective delivery of the incentive program and to coordinate with upcoming Title 24 changes per AB 970:

- Incentive caps were lowered to increase the total number of participants
- Incentive rates were adjusted to more closely reflect the incremental costs associated with different end-uses and systems

- HVAC equipment thresholds were raised to introduce to the market the new efficiency levels that will be required by the new Standards

As of March 31, 2001, the SBD activities are expected to produce approximately 7,400 MWh of net annualized energy savings and 1.0 MW of net capacity reduction.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$1,700

Revised: \$1,150

See Statewide Programs for further discussion of other activities completed for the Savings By Design program.

Section 4: New Construction Programs

New construction programs are developed to increase the energy efficiency of building design, as well as the efficiency of the technologies buildings employ. Prior to construction equipment efficiency for lighting, heating, ventilation, and air-conditioning can be upgraded, with supplemental equipment (primarily controls) or materials (e.g., insulation). Many of these energy efficiency measures become too expensive to install once a structure has been completed. As a result, many of SCE's efforts are directed toward modifying customer behavior during the concept and design phases of construction.

Residential New Construction

(for detail see A.00-11-043 p. E-4)

SCE's Residential New Construction program will seek to transform the residential new construction market to one in which consumers demand and the market delivers homes which are more energy-efficient than required by current code (Title 24). The program will aim to increase awareness among key market actors – including builders, consumers, lenders and third party builder allies (architects, energy consultants, subcontractors, Title 24 Consultants, and CHEERS raters). The integrated approach to this market will include increased awareness through targeted information on the financial value of efficient, quality construction, enhancement of skills through education and training, and the creation of a competitive market for efficient new homes. Implementation of these elements under the umbrella of a single program will ensure that appropriate linkages are made between efforts to influence different, but related market actors and overcome different, but related market barriers. This integration also offers the potential for greater efficiency, synergism, and flexibility in program implementation.

Program Elements

ELEMENT NAME	ELEMENT ACTIVITY
SCE-sponsored ComfortWise sm	See below
Emerging Technologies Showcasing	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs
Third-Party Initiatives	See Crosscutting Programs

Residential New Construction

(for detail see A.00-11-043 p. E-7)

Program Element Summary

This program has a variety of offerings ranging from incentives to education and information. Starting in 2001, SCE will offer financial incentives to manufacturers to buy-down the cost of high efficiency central air conditioners (e.g., SEER 14, 11.6 EER), as well as offering "Fast Track" incentives to the air conditioning contractors for installations occurring by July 31, 2001. SCE will also continue the ComfortWise/EnergyStar Homes residential new construction

program that provides builder incentives for properly sized air conditioning units, resulting from better mechanical design and installation practices; high efficiency windows; inspections and diagnostics.

Activities, Accomplishment, Market Progress, & Modifications

The Residential New Construction program has committed 62 units to the HVAC component of the program. In order to increase participation in this program component, SCE will be offering informational seminars to residential customers in communities where potential EnergyStar homes could be built. It is expected that this will create greater demand for more energy efficient homes.

A Request for Proposals was released for submittals to participate in a residential new construction pilot program for high efficiency air conditioners with thermal expansion valves. This manufacturer buy-down program offering is expected to have a greater demand from manufacturers than earlier expected. This higher demand coupled with a distributor/contractor incentive, for units installed by summer 2001, should produce better results than earlier projected.

In coordination with the California Energy Commission, SCE has sponsored four of eight Title 24 seminars which educate homebuilders, building officials, energy consultants, and HVAC contractors on significant changes to the energy code resulting from AB970. The tally thus far is, approximately 20 cities/counties; and 52 companies representing builders, HVAC contractors, energy consultants, architects and engineers for a total of 230 attendees. Due to overwhelming demand for the training SCE added a ninth seminar--for a total of 17 seminars. The remaining seminars sponsored by SCE will occur in May.

SCE continues to promote and distribute the statewide Builder Resource Guide which is an encyclopedic reference on energy efficiency as it pertains to all areas of residential new construction.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$3,750
Revised: \$3,100

Commercial New Construction

(for detail see A.00-11-043 p. E-12)

The Commercial New Construction (CNC) program is designed to transform energy efficiency investment behavior in non-industrial, non-agricultural and nonresidential construction markets. The objective of the CNC program is to increase the energy efficiency of building design, as well as the efficiency of the technologies buildings employ. By integrating interactions between multiple end-uses and efficiency technologies, comprehensive design saves large amounts of energy and capital while improving comfort and productivity. The program's elements target distinct links in the new construction decision-making chain, reflecting differences in design activities and priorities between large and small buildings. All elements target all end-uses in commercial buildings, particularly the predominant end-uses of lighting and HVAC. Intervention strategies mix design tools and information, technical assistance, and training with financial incentives to increase supply of and demand for high-efficiency building design, equipment, and materials. Base funding for energy centers focusing on new nonresidential construction is also included in this program.

Program Elements

ELEMENT NAME	ELEMENT ACTIVITY
Savings By Design	See below
Energy Design Resources	See below
Emerging Technologies Showcasing	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs
Third-Party Initiatives	See Crosscutting Programs

Savings By Design

(for detail see A.00-11-043 p. E-16)

Program Element Summary

Savings By Design (SBD) – SBD is a statewide program element that promotes high performance nonresidential building design and construction. The program element encourages the construction and operation of energy-efficient buildings and the process seeks to permanently reduce the transaction costs associated with developing and evaluating energy-efficient design alternatives. SBD will improve the comfort, efficiency, and performance of buildings by promoting an integrated team approach to design, including a focus on system performance assurance. The program element provides direct benefits to all market actors and market segments, including building owners – large or small, public or private, occupant or developer – and design professionals involved in new building design and construction.

SBD assures the construction and operation of energy-efficient buildings by intervening to make building designs more energy-efficient, improve the efficiency of the technologies that buildings employ, provide mechanisms to evaluate program success, and permanently engender these practices in the marketplace. The SBD program element targets specific links in the construction

decision-making chain, reflecting differences in design activities and priorities between large and small buildings and various occupancies.

Activities, Accomplishment, Market Progress, & Modifications

Modifications to the program were made to allow for more effective delivery of the incentive program and to coordinate with upcoming Title 24 changes per AB970:

- Incentive caps were lowered to increase the total number of participants
- Incentive rates were adjusted to more closely reflect the incremental costs associated with different end-uses and systems
- HVAC equipment thresholds were raised to introduce to the market the new efficiency levels that will be required by the new Standards

As of March 31, 2001, the Commercial SBD activities are expected to produce approximately 4,800 MWh of net annualized energy savings and 0.9 MW of net capacity reduction.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$5,000

Revised: \$7,850

See Statewide Programs for further discussion of other activities completed for the Savings By Design program.

Energy Design Resources

(for detail see A.00-11-043, p. E-18)

Program Element Summary

Energy Design Resources is an integrated package of design tools and information resources that promotes the design and construction of high-performance buildings. These tools are readily available and accessible to designers working in the new construction market and inherently complement the whole building approach strategies of the Savings By Design program. The program provides information resources, software tools, technology transfer, and validation of and peer recognition for designers and developers of exemplary projects that successfully incorporate principles of energy-efficient design, initiate and pilot projects, process and procedural models, and industry and academic partnerships.

Element Activities, Accomplishment, Market Progress, & Modifications

Development of new Energy Design Resources materials was minimized in 2001 in order to focus available resources on securing energy reductions, however, promotion of the existing tools in the new construction market has continued.

On-site luncheon seminars were provided as shown in the table below:

February 7	Loring Cruz Design & Consulting	Daylighting
February 8	Richard Meier & Partners	Daylighting
February 8	HOK, Santa Monica	Integrated Design
February 15	Dougherty & Dougherty	Integrated Design
March 28	Anshen & Allen Architects	Daylighting
March 29	Steven Ehrlich Architects	Daylighting

Final packaging of materials developed in 2000 was continued, with completion of a second volume of design briefs and new electronic tools available in the second quarter.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$1,200

Revised: \$100

Industrial/Agricultural New Construction

(for detail see A.00-11-043, p. E-19)

The Industrial and Agricultural New Construction (IANC) program is designed to transform energy efficiency investment behavior for process loads in new construction and facility expansion projects. The objective of the IANC program is to optimize the energy efficiency of new and expanded industrial and agricultural process, as well as the facilities where processes are housed. Two separate program elements target process- and facility-related efficiency opportunities and decisions. While the technical opportunities and constraints are distinct, the intervention strategies targeting barriers to energy-efficient choices are similar in both elements. Each element combines specialized technical assistance, integrated design assistance and incentives, and customized financial strategies.

Program Elements

ELEMENT DESCRIPTION	ELEMENT ACTIVITY
Savings By Design	See below
Emerging Technologies Showcasing	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs
Third-Party Initiatives	See Crosscutting Programs

Savings By Design

(for detail see A.00-11-043, p. E-20)

Program Element Summary

SBD is a statewide program element that promotes high performance industrial and agricultural facility design and construction. The program element encourages the construction of energy-efficient manufacturing facilities and processes, and seeks to permanently reduce the transaction costs associated with developing and evaluating energy-efficient design alternatives. SBD will improve the comfort, efficiency, and performance of industrial and agricultural facilities by promoting an integrated team approach to design. The program element provides direct benefits to all market actors and market segments, including building owners – large or small, public or private, occupant or developer – and design professionals involved in new facility and process design and implementation.

Element Activities, Accomplishment, Market Progress, & Modifications

The following modification(s) to the program was made to allow for more effective delivery of the incentive program:

- Incentive caps were lowered to increase the total number of participants

As of March 31, 2001, the SBD activities are expected to produce approximately 300 MWh of net annualized energy savings and 0.1 MW of net capacity reduction.

Program Element Budget (\$000), Excluding General Support Activities:
See Savings By Design - Commercial

Codes & Standards Support and Local Government Initiatives

(for detail see A.00-11-043, p. E-22)

This integrated program seeks to support the development and implementation codes and standards, with an emphasis on peak electric demand reduction, across both new construction and remodel/renovation markets to the extent that both new construction and major tenant improvements involve the same market participants and are subject to California’s “Energy Efficiency Standards for Residential and Nonresidential buildings,” also known as Title 24 Energy Standards. The program also addresses standards-setting organizations such as the American Society of Heating, Refrigeration and Air-Conditioning Engineers, code-setting bodies such as the California Energy Commission and the Department of Energy, and enforcement authorities such as city and county building departments.

Program Elements:

ELEMENT DESCRIPTION	ELEMENT ACTIVITY
New Construction Codes & Standards	See below
Local Government Initiative	See below
CTAC / AGTAC Energy Centers	See Crosscutting Programs
Third-Party Initiatives	See Crosscutting Programs

New Construction Codes & Standards

(for detail see A.00-11-043, p. E-24)

Program Element Summary

The Codes and Standards program element proposes to bring about upgrades in energy efficiency standards and codes, thereby capturing the benefits for society from California’s diverse energy efficiency efforts. Codes and Standards Enhancement studies for energy efficiency improvements will be developed for promising design practices and technologies (such as those developed in the Residential and Nonresidential New Construction programs) and will be presented to standards code setting bodies in a coordinated manner.

Element Activities, Accomplishment, Market Progress, & Modifications

- The statewide codes and standard team conducted meetings to develop energy efficiency enhancements for the 2004 revisions to the Title-24 Building Energy Efficiency Standards.
- The statewide team coordinated the Building Energy Efficiency Standards training sessions. The training sessions seek to educate building stakeholders on the AB 970 revisions to the Title-24 standards.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$1,670

Revised: \$700

Local Government Initiative

(for detail see A.00-11-043, p. E-25)

Program Element Summary

This element will support local government initiatives to transform energy efficiency markets at the community level. Some local governments may use the municipal planning process and the development approval process to institutionalize wider consideration and implementation of energy efficiency in community planning and new construction. Other local governments may establish institutions or programs to mobilize and link community resources to form self-sustaining partnerships, mechanisms and/or initiatives that promote and facilitate energy efficacy on a community-wide basis. These community-based initiatives can also mobilize and link a broad range of community resources (local financial institutions, contractors, business organizations, service clubs, and non-profits) to form self-sustaining partnerships, mechanisms and /or initiatives to promote and facilitate energy efficiency.

Activities, Accomplishment, Market Progress, & Modifications

Due to the electricity crisis for 2001, there was significant need to revise and modify content of the 2001 project plan proposed by the Local Government Commission. A revised project plan to focus on immediate energy savings has been issued. As a result, there are no significant results to report for first quarter.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$400

Revised: \$385*

* - does not include any initiatives with individual cities.

Section 5: Statewide And Crosscutting Programs

Statewide Program Activity

Residential

Statewide Residential Energy Guide

- a. Description of program and program element/strategy*
- Pacific Gas and Electric Company, Southern California Edison, and San Diego Gas & Electric Company continue to distribute existing English, Spanish and Chinese Statewide Energy Guides to residential customers through a variety of delivery channels. The Residential Energy Guide provides statewide consistency on energy efficiency information and awareness of appliance practices and resources to each utility's residential customers.
- b. Market participants and/or end uses*
- Participants: The target market for the Statewide Residential Energy Guide is residential customers.
 - End Uses: All residential end uses are targeted.
- c. Accomplishments/milestones/market effects observed to date*
- During the first quarter of 2001, utility focus was on distributing existing back-stock of the Energy Guide. In addition, efforts are underway to revise and distribute utility specific "Quick Tips" energy guides.

Statewide Residential Lighting Program

- a. Description of program and program element/strategy*
- Pacific Gas and Electric Company, Southern California Edison, and San Diego Gas & Electric continue to coordinate efforts under the Statewide Residential Lighting program.
 - In PY2001, lighting program strategies included manufacturer incentives, education and outreach to retailers and manufacturers, field services, salesperson training, paid advertising, and other consumer outreach and promotional activities.
- b. Market participants and/or end uses*
- Participants: Residential Customers
 - End Uses: ENERGY STAR[®] qualified lighting products
- c. Accomplishments/milestones/market effects observed to date*
- Year to date, three co-op projects have been approved with three manufacturers promoting ENERGY STAR[®] qualified torchieres and compact fluorescent light bulbs to

multiple retailers. Participating manufacturers include Lights of America, GE Lighting and Feit Electric.

Statewide Residential Appliance Program

- a. Description of program and program element/strategy*
- Pacific Gas and Electric Company, Southern California Edison, Southern California Gas Company and San Diego Gas & Electric continue to coordinate efforts under the Statewide Residential Appliance program.
- b. Market participants and/or end uses*
- Participants: Residential customers
 - End Uses: ENERGY STAR[®] qualified appliances
- c. Accomplishments/milestones/market effects observed to date*
- Each utility currently operates and administers coordinated cooperative promotional incentives to retailers and manufacturers (co-op programs)

Residential Energy Efficiency Contractor program (RCP)

- a. Description of program and program element/strategy*
- The 2000 Residential Contractor Program was originally designed to promote a self-sustaining contractor market for energy efficiency services in the residential retrofit, renovation, and remodeling market. Recent changes in the energy market have caused the program to shift some efforts from upstream to downstream in order to address a changing energy market.
 - The program has two distinct elements: the Multifamily and Single Family Elements: Multifamily Element applies to:
 - apartment dwelling units
 - common areas of apartments and condominium complexes, and
 - common areas of mobile home parks.
 - The Single Family Element applies to:
 - single family homes
 - condominium dwelling units,
 - small attached apartments with up to four dwelling units (e.g., duplexes, triplexes, and fourplexes), and
 - mobile homes
- b. Market participants and/or end uses*
- Participants: Residential customers
 - End Uses: Various residential applications
- c. Accomplishments/milestones/market effects observed to date*

- During the first quarter of PY 2001, the utilities begun working together to build consensus on high efficiency central air conditioner and heat pump specifications for PY 2002 rebate programs.
- As part of this effort, initial planning for a meeting with ENERGY STAR[®] representatives was originated. The utilities plan to jointly request changes in the ENERGY STAR[®] specification and appeal for the earliest possible implementation of the revised standard. Specifications for the PY2002 high efficiency central air conditioning and heat pump equipment can be set and communicated to all stakeholders after the EPA and DOE announce the revised ENERGY STAR[®] requirements. Early communication and statewide consistency will help to ensure adequate equipment availability in 2002 and enhance the effectiveness of utility administered programs.

Nonresidential

Large Nonresidential Standard Performance Contract (LNSPC) Program

a. Description

- Performance based program that offers incentives (posted price) to customers or Energy Efficiency Service Providers (EESPs) for installation of energy efficient equipment at customer facilities.
- The program targets large nonresidential customers.
- LNSPC is standardized statewide. This includes incentive levels, procedures, and contracts, with some program differences to reflect different service territory needs.
- Incentive levels are based on measure end use and the type of energy savings verification plan.
- Utility promotes and administers the program with EESPs and utility account services representatives promoting energy efficient projects to customers.

b. Market participants and/or end uses

- Participants: Large commercial, industrial and agricultural customers (greater than 500 kW or 250,000 annual therms), Energy Efficient Service Providers (EESP), contractors, and engineering firms.
- End Uses: Heating, ventilation, air-conditioning, lighting, water heating, and other building-type specific end uses.

c. Accomplishments/milestones/market effects observed to date

- In 2001, there are two payment levels based on end use and verification plan. The Calculated Savings Option (CSO) eliminates field measurement (reference tables and engineering calculations are used). The Measured Savings Option (MSO) offers a higher incentive because field measurement is required to verify achieved energy savings.
- The CSO incentive for natural gas measures is \$1.00 per annual therm of savings. The CSO incentive for electric measures are as follows: lighting measures – 5.5¢ per kWh, HVAC and refrigeration measures – 18.0¢ per kWh, and other measures (e.g., motors, variable speed drives) - 9.0¢ per kWh. The incentive for summer on-peak kW savings is \$100 for lighting measures, \$225 for HVAC measures and \$150 for other measures.
- The MSO incentive for natural gas measures is \$1.10 per annual therm of savings. The MSO incentive for electric measures are as follows: lighting measures – 6.0¢ per kWh, HVAC and refrigeration measures – 20.0¢ per kWh, and other measures (motors, variable speed drives) - 10.0¢ per kWh. The incentives for summer on-peak kW savings are the same as the CSO incentive.

Small Business Standard Performance Contract (SBSPC) Program

a. Description:

- Similar to Large Nonresidential Standard Performance Contract (LNSPC) Program.
- The program targets small and medium nonresidential customers.
- SBSPC is standardized statewide. This includes incentive levels, procedures, and contracts, with some program differences to reflect different service territory needs.
- A customer may self-sponsor an SBSPC project in 2001.
- Incentive levels are based on measure end use and the energy savings verification plan.

b. Market participants and/or end uses

- Participants: Small and medium commercial, industrial, and agricultural customers with electric demand equal to or less than 500 kW or 250,000 annual therms.
- End Uses: Heating, ventilation, air-conditioning, lighting, water heating, and other building-type-specific end uses.

c. Accomplishments/milestones/market effects observed to date

- In 2001, there are two payment levels based on end use and verification plan. The Calculated Savings Option (CSO) eliminates field measurement (reference tables are used). The Measured Savings Option (MSO) offers a higher incentive because field measurement is required to verify achieved energy savings.
- The CSO incentive for natural gas measures is \$1.10 per annual therm of savings. The CSO incentive for electric measures are as follows: lighting measures – 6.0¢ per kWh, HVAC and refrigeration measures – 20.0¢ per kWh, and other measures (e.g., motors, variable speed drives) - 10.0¢ per kWh. The incentive for summer on-peak kW savings is \$125 for lighting measures, \$250 for HVAC measures and \$175 for other measures.
- The MSO incentive for natural gas measures is \$1.20 per annual therm of savings. The MSO incentive for electric measures are as follows: lighting measures – 7.0¢ per kWh, HVAC and refrigeration measures – 22.5¢ per kWh, and other measures (motors, variable speed drives) - 11.0¢ per kWh. The incentives for summer on-peak kW savings are the same as the CSO incentive.

Express Efficiency Program

a. Description:

- Provides standard rebates to customers, contractors, and EESPs for installation of energy efficient equipment.
- The program targets small and medium nonresidential customers.
- Statewide program, with differences to reflect different service territory needs.
- Incentive cap of \$25,000 per account and \$2 million per corporate parent statewide.

b. Market participants and/or end uses

- Participants: Small and medium commercial, industrial, and agricultural customers (equal to or less than 500 kW or 250,000 annual therm).
- End Uses: Heating, ventilation, air-conditioning, refrigeration, lighting, water heating, and other building-type-specific end uses including agricultural.

c. *Accomplishments/milestones/market effects observed to date*

- In 2001, several new measures were added to the program. These measures (refrigeration, agricultural and additional gas measures) will help with the outreach to specific end use customers.
- New technologies will be evaluated and possibly demonstrated, and where appropriate, added to the Express Efficiency program.

Statewide Business Energy Guide
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a. *Description:*

- Statewide energy guide provides energy information and education to customers to better manage their business energy costs.
- Provides energy information for office buildings, grocery stores, restaurants, retail outlets and manufacturing facilities.
- Brochure currently available in English, Spanish and Chinese.
- Target markets includes commercial businesses, business trade/vendor shows, Small Business Associations, Chambers of Commerce, building permits and government offices and business on-site surveys conducted by utility representatives.

b. *Market participants and/or end uses*

- Participants: Small and medium commercial, industrial, and agricultural customers (equal to or less than 500 kW).
- End Uses: Heating, ventilation, air-conditioning, lighting, water heating, and other building-type-specific end uses.

c. *Accomplishments/milestones/market effects observed to date*

- The utilities continue to distribute the Business Energy Guide to small nonresidential customers.

Emerging Technologies

a. *Description:*

- Emerging Technologies activities focus on demonstrating energy efficiency options not widely adopted by various market actors.
- Program makes detailed designs of efficiency options and their performance information widely available.

- The Emerging Technologies Coordinating Council (ETTC) was established to seek opportunities to coordinate efforts between each of the utilities emerging technologies programs as well as the CEC's PIER program.

b. Market participants and/or end uses

- Participants: All customers
- End Uses: Heating, ventilation, air-conditioning, lighting, water heating, and other building-type-specific end uses.

c. Accomplishments/milestones/market effects observed to date

- The utilities and the CEC continue discussions on emerging technologies through the Emerging Technologies Coordinating Council.
- The utilities continue to work with individual customers to develop showcase emerging technologies projects in their service territories.

Energy Centers

a. Description

- Three of the state's investor owned utilities, PG&E, SCE, and SCG operate Energy Centers. Unified by the common goal of educating their customers about energy-efficient business solutions, the utilities' jointly developed plans to increase cooperation among the utility energy centers. This plan addressed three potential areas for working together collaboratively to build on a statewide program. These are: (A) seminar/program coordination; (B) a web based energy efficiency library; and (C) a partnership program with independent third parties and/or state agencies.
- Energy Centers use training, outreach, education, and tool development to support delivery of statewide programs. Energy Centers are uniquely suited to address peak demand reduction and promote energy savings directly by offering programs designed specifically for that purpose.

b. Market participants and/or end uses

- Participants: All customers
- End Uses: All end uses

c. Accomplishments/milestones/market effects observed to date

- **Seminar/Program Coordination**: The utilities continue to coordinate seminars as appropriate. The centers recognize that, through regional collaboration, the opportunity exists to develop a more comprehensive set of energy efficiency conferences/seminars that would reflect the expertise and experience from a diverse group of contributors statewide.
- **Web-Based Energy Efficiency Library**: The Energy Centers see this as a centralized and comprehensive online information library that could serve as an electronic information hub on all aspects of energy efficiency. Through a collaborative effort, an

independent contractor was hired to construct a site named “energyefficiencycenter.com.” The site, which was implemented on April 17, 2000, provides users with links to the energy centers as well as links to a number of associations, organizations, and government agencies where information on energy efficiency can be found. The links are categorized to assist the users, and a search engine (which will be further enhanced) will also help guide users to the information they seek.

- **Partnership Program with Third Parties and/or State Agencies:** The Energy Centers will also further investigate how partnerships can be utilized to enhance the web site and its content. This effort is still under development.

New Construction

Savings By Design (SBD)

a. Description of program and program element/strategy

- A statewide program implemented by PG&E, SCE, SCG, and SDG&E that encourages high performance commercial building design and construction.
- Seeks to permanently reduce the transaction costs associated with developing and evaluating energy efficient design alternatives.
- Seeks to improve the comfort, efficiency, and performance of buildings by promoting an integrated team approach to design.
- The Nonresidential Retrofit and Renovation program is also covered under the SBD program although implementation may differ by utility.

b. Market participants and/or end uses

- Participants: Primary decision makers in new construction and major renovation and remodeling projects: Program components address building owners, architects, engineers, contractors, builders, developers, energy consultants, and facilities personnel in all non-residential new construction projects. Equipment manufacturers and vendors will also be influenced as primary market actors increase demand for high efficiency building components. School districts will be specifically targeted as an underserved market for PY2001. For the purposes of this program element, eligible projects are defined as facilities where the building is still in the design stage of the project and include:
 - “ground-up” facilities that are being newly constructed in utility’s territory
 - permanent facility additions that add square footage to an existing structure
 - “gut-rehabilitation” of appropriate nonresidential facilities within the utility’s service territory
 - first-time and broad-scope tenant improvements to facilities involved with a change of tenant or occupancy
 - facility remodels involving replacement of at least half of one or more building energy systems
- End Uses: All energy-consuming systems supporting or housed within a new facility.

c. Accomplishments/milestones/market effects observed to date

- Program thresholds updated to introduce the market to new AB970 standards, to be effective in 2001.
- Brochure updated and reprinted to include Southern California Gas Company and natural gas measures.
- Cooperative display and presentation at the American Institute of Architects California Council Design Conference held in Monterey, California. Over 700 architects from across California were in attendance. More than 100 attended the session presented by Savings By Design dedicated to daylighting strategies, entitled “Building as Luminaire”.

- Call for entries created and distributed for the 2001 Savings By Design Energy Efficiency Integration Award.

Energy Design Resources Program

a. *Description of program and program element/strategy*

- Provides an integrated package of design tools and information resources that promote the design and construction of high-performance buildings.
- A website is utilized to offer additional interactive resources and provide downloadable tools.
- Complements the Whole Building Approach strategies of the Savings By Design program.
- Provides validation of and peer recognition for designers and developers of exemplary projects that successfully incorporate principles of energy efficient design.

b. *Market participants and/or end uses*

- Participants: The program targets two primary market actor groups within the new construction industry:
 - Designers (architects, engineers, lighting designers, energy consultants) and developers, including students of these disciplines, who establish the characteristics of new building projects through design and construction
 - Decision-makers who set the programmatic requirements for new building projects and can create a demand for energy efficiency facilities and design expertise
- End Uses: All energy-consuming systems supporting or housed within a new facility.

c. *Accomplishments/milestones/market effects observed to date*

- Expanding the EDR website to include on-line learning for such topics as lighting, controls, luminaires, and other new technologies.
- Continuing a bi-weekly electronic newsletter that addresses energy efficiency and high performance technologies. Newsletter is distributed to all those registered on the statewide EDR website.
- Finalizing approvals, contracts and printing for the second edition of the EDR binder. To include 14 new Design Briefs, an in-depth integrated design case study, a Building Commissioning Manual, and an international daylighting research report.

Codes & Standards Program

a. *Description of program and program element/strategy*

Codes and Standards works to bring about upgrades in standards and codes, thereby capturing the benefits for society from California's diverse energy efficiency market transformation efforts. Case for improvements are developed for promising design practices and technologies and then presented to standards and code setting bodies in a coordinated manner.

b. Market participants and/or end uses

Participants:

- Code-setting bodies such as the California Energy Commission, the US Department of Energy, and the Federal Trade Commission.
- Standards-setting, rating-setting, and research support organizations including: the American Society of Heating and Refrigerating and Air Conditioning Engineers, the Illuminating Engineering Society, the National Fenestration Rating Council, the Cool Roof Rating Council, the Institute of Transportation Engineers, the U.S. Green Building Council, and the California Institute for Energy Efficiency.
- Stakeholders to specific code enhancements including: the California Building Industry Association, Building Owners and Managers Association, manufacturing associations, and other industry groups and individuals.
- Code enforcers and enforcement organizations, such as, California Building Officials, and managers of energy efficiency programs.

c. Accomplishments/milestones/market effects observed to date

- A meeting/conference call was held in March to review a C.A.S.E. study for “Total Community Super Credit Project”, a “green” residential community built with narrower streets, shade trees, solar orientation of homes, and other attributes designed to improve energy efficiency.
- Continued support for permanent adoption of new residential and nonresidential building standards and appliance standards through attendance and advocacy during public meetings at the CEC.
- Sponsored residential and nonresidential Title 24 training sessions, addressing AB 970 code changes.

Crosscutting Program Activity

Included within Southern California Edison's programs are various activities that help support each of the 14 programs. These activities include Energy Centers, Emerging Technologies, and Third-Party Initiatives.

Emerging Technologies

(for detail see A. 00-11-043, p F-48)

Program Element Summary

The Emerging Technologies activities focus on demonstrating energy efficiency options not widely adopted by various market actors. The program makes detailed designs of efficiency options and their performance information widely available.

In 2001, SCE will focus much of its attention on the promotion of energy efficiency that can achieve immediate energy savings and demand reductions. As a result, activities under the Emerging Technologies Showcasing program have been significantly scaled back. Nevertheless, SCE believes promotion of emerging technologies is a key factor to customer adoption of emerging energy efficiency technologies. To that end, SCE will continue to coordinate its ongoing showcase efforts with the Emerging Technologies Coordinating Counsel, maintain the Counsel's web site, and update the projects database on the web site. In addition, approximately six to eight showcase agreements will be signed in 2001. The showcasing results will be added to the Counsel's projects database. SCE will continue to work with other utilities and industry members in the development of future codes and standards.

Activities, Accomplishment, Market Progress, & Modifications:

- Met with the Los Angeles Unified School District to define the scope of work in a showcase project.
- Completed the bid package for installing 52 fans in a dairy farm to improve the energy efficiency of its air circulation system.
- Completed negotiations with UCLA/Occidental College for a joint effort to demonstrate the potential benefit of switching from dry cleaning to professional wet cleaning technology.
- Identified customers for field-testing heat pump hot water heaters.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$4,000

Revised: \$1,135*

* includes Codes and Standards activities.

Energy Centers - CTAC, AGTAC

(for detail see A. 00-11-043, p F-53)

Program Element Summary

SCE possesses two distinct energy centers. The *Customer Technology Application Center (CTAC)*, which opened in 1990, is located central to the metropolitan Los Angeles County and Orange County regions. The *Agricultural Technology Application Center (AGTAC)* opened in 1996 and is located in the heart of the northern agricultural region of SCE service territory, the San Joaquin Valley. The centers are dedicated to the transfer of technology to the market place, including energy efficient technologies. The PGC goal of the centers is to intervene in the market place to enhance this diffusion of energy efficient technologies.

Customer Technology Application Center (CTAC) -

CTAC is a 45,000 square foot facility that is comprised of five technology centers: the Lighting Products Center, the Commercial Products Center, the Home Efficiency Center, the Industrial Technology Center, and the Foodservice Technology Center. CTAC also collaborates with a sixth center: the Refrigeration Technology Testing Center (RTTC) is part of the CTAC facility, but is funded through Showcasing activities. CTAC offers services to residential, commercial, and industrial customers. CTAC provides information on state-of-the art energy efficient technologies to customers, retailers, distributors, manufacturers, architects, engineers, and designers through, displays, training, demonstrations, and printed materials.

The Agricultural Technology Application Center (AGTAC) -

AGTAC is a multifaceted technology demonstration center located on a 10-acre site in Tulare, CA. The 16,000 square foot facility includes a 2,000 square foot Learning Center, a large Exhibit Hall, a Lighting Products Center and a Business Resource Center. Outside the building is a 4.5 acre Outdoor Demonstration Grounds. AGTAC’s primary focus is with the agricultural community and agricultural processing. However, it also provides services and information to commercial, industrial and residential customers, and upstream actors.

Activities, Accomplishment, Market Progress, & Modifications:

Customer Technology Application Center (CTAC) –

CTAC set performance goals to increase EE activities by 10% over 2000 levels. The following shows CTACs first quarter results through March 2001.

	2000 ACTUAL	2001 GOAL	YTD
Seminar Attendance	1,019	1,158	302
Joint Utility Classes	3	6	0

- Phase 1 of a study to determine the feasibility of satellite energy centers was completed, the final due in April. Phase 1 will survey for the general location of target markets relative to the two centers. Through sophisticated techniques, maps were created showing clusters of customers identified by industry.

The Agricultural Technology Application Center (AGTAC) –

AGTAC set performance goals to increase EE activities by 10% over 2000 actual. The following shows AGTAC first quarter results through March 2001.

	2000 ACTUAL	2001 GOAL	YTD
Seminar Attendance	679	747	488
Joint Utility Classes	0	2	1

NOTES: High first quarter attendance figures are attributed to attendance of seasonal irrigation class offerings and completion of classes targeted to elementary students within the rural county of Tulare.

Program Element Budget (\$000), Excluding General Support Activities:

CTAC

Authorized: \$2,135

Revised: \$2,135

AGTAC

Authorized: \$634

Revised: \$688

Third Party Initiatives

(for detail see A. 00-11-043, p. F-67)

SCE's Third Party Initiative (TPI) Program is designed to solicit innovative strategies and technologies from the marketplace. For 2001, there was a greater focus on cost-effectiveness and on projects aimed at achieving energy savings and demand reductions beginning in the summer of 2001.

Element Activity, Accomplishments, Market Progress, & Modifications:

More than 125 entities were notified directly by SCE of the opportunity to bid on this program, by e-mail or telephone, starting in late November. SCE received 51 proposals for the 2001 program by the closing date of January 31. By the end of March, ten winning bidders had been notified of their selection and invited to begin working on their project plans. In addition, four previously awarded TPI projects were selected for additional funding. Total projected expenditure on 2001 TPIs is \$6.4 million, as required by the Commission.

In the nonresidential sector, the most cost-effective projects with highest likelihood of achieving energy savings and demand reductions during Summer 2001 were selected. In the residential and new construction sectors, one project was selected on this basis, and the other projects were selected to meet other Commission goals and requirements for 2001. In general, SCE has found that TPI proposals are less cost-effective than SCE's programs. TPI programs appear better suited to testing innovative program concepts than to maximizing energy savings and demand reduction goals for a program portfolio.

The following are the 2001 TPI results through March 31, 2001:

- No energy savings or peak demand reductions yet achieved.
- \$4,911,000 committed to newly selected TPI projects.
- \$1,244,000 allocated to extending previously selected TPI projects.

- \$244,000 allocated to administrative costs for all TPI projects.

The selected projects are as follows:

1. Residential Retrofit Projects

- Green Schools intensive pilot program in San Bernardino.
- Compact fluorescent lighting promotion and free sample project, including torchiere exchange events.
- Time-of-sale home energy efficiency audits with an air conditioning rebate offer. Refine UCLA energy usage analysis software for home remodeling decisions.

2. Nonresidential Retrofit Projects

- Retrofitting beverage vending machines.
- Small/medium business air conditioning retrofits.
- Commercial building commissioning.
- Hard-to-reach small business lighting retrofit and HVAC enhancements.
- Small/medium commercial lighting audits, design and retrofits.

3. New Construction Projects

- The Community Energy Efficiency program, working with local governments on increasing energy efficiency in the community and in new buildings and developments being permitted.
- A project to increase energy efficiency in new multi-family housing.
- A project to increase the energy efficiency of new manufactured homes.
- Enhancement of the E-Quest nonresidential energy efficiency design software.

Program Element Budget (\$000), Excluding General Support Activities:

Authorized: \$4,000

Revised: \$6,390

Section 6: Program Summary Tables

Table 6.1
Southern California Edison Company
Program Portfolio Budget - YTD
PY2001
(\$ in millions)

Table TA-9.2A: 2000 Program Portfolio Budgets

Program	2000 Recorded Expenses	2001 Authorized Budget ^[1]	2001 Revised Budget ^[2]	YTD		2001 Total Actual + Committed
				Actual 03/31/2001	Commitments 03/31/2001	
Residential Programs						
Heating and Cooling Systems						
Residential Audits	\$ 0.928	\$ 0.475	\$ 0.475	\$ 0.036	\$ 0.051	\$ 0.087
Local Government Initiative	-	0.200	0.200	-	-	-
Res EE Procurement Program (REEPP)	0.080	0.050	-	-	-	-
Calif Home Energy Eff Rating System (CHEERS)	0.100	0.080	0.080	0.001	-	0.001
Mass Market Information	0.042	0.313	0.615	0.328	-	0.328
Emerging Technologies	0.500	0.300	0.135	0.012	-	0.012
Energy Centers - CTAC/AGTAC	0.071	0.172	0.172	0.014	-	0.014
TPI Administration/Solicitation Process	0.250	0.400	0.170	-	-	-
General Support Activities ^[3]	0.068	0.073	0.069	0.008	-	0.008
Sub Total	2.038	2.062	1.916	0.399	0.051	0.450
Residential Lighting						
Residential Audits	0.646	0.260	0.260	0.019	0.031	0.049
Local Government Initiative	-	0.300	0.300	-	-	-
Res EE Procurement Program (REEPP)	0.225	0.100	-	-	-	-
Calif Home Energy Eff Rating System (CHEERS)	0.100	0.080	0.080	0.001	-	0.001
Mass Market Information	0.042	0.313	0.594	0.307	-	0.307
Energy Centers - CTAC/AGTAC	0.140	0.144	0.144	0.016	-	0.016
TPI Administration/Solicitation Process	0.250	0.400	0.873	-	-	-
Retail Initiative Lighting (Statewide)	2.839	2.450	3.200	0.009	1.700	1.709
Residential Contractor (Statewide)	0.600	-	-	-	-	-
General Support Activities ^[3]	0.104	0.147	0.203	0.023	-	0.023
Sub Total	4.945	4.194	5.654	0.375	1.731	2.106
Residential Appliances						
Residential Audits	0.386	0.215	0.215	0.018	0.020	0.038
Local Government Initiative	-	0.200	0.200	-	-	-
Res EE Procurement Program (REEPP)	0.480	0.300	-	-	-	-
Calif Home Energy Eff Rating System (CHEERS)	0.045	0.080	0.080	0.001	-	0.001
Mass Market Information	0.042	0.313	0.855	0.568	-	0.568
Energy Centers - CTAC/AGTAC	0.105	0.103	0.103	0.008	-	0.008
TPI Administration/Solicitation Process	0.250	0.400	0.560	-	-	-
Residential Spare Refrigerator Recycling	7.130	7.500	7.500	1.469	-	1.469
Residential Appliance (D)	2.795	1.440	4.003	0.015	0.426	0.440
Residential Appliance (U)	3.649	0.625	0.250	0.000	-	0.000
General Support Activities ^[3]	0.484	0.407	0.513	0.059	-	0.059
Sub Total	15.366	11.583	14.279	2.138	0.445	2.583
Residential Retrofit & Renovation						
Residential Audits	0.860	0.750	0.750	0.055	0.085	0.140
Local Government Initiative	-	0.200	0.200	-	-	-
Residential Contractor	5.041	8.378	4.817	0.053	1.198	1.251
Res EE Procurement Program (REEPP)	0.080	0.050	-	-	-	-
Calif Home Energy Eff Rating System (CHEERS)	0.075	0.060	0.060	0.000	-	0.000
Mass Market Information (Statewide)	0.042	0.313	0.553	0.266	-	0.266
Emerging Technologies	0.200	0.480	-	-	-	-
Energy Centers - CTAC/AGTAC	0.101	0.103	0.103	0.010	-	0.010
TPI Administration/Solicitation Process	0.253	0.400	0.400	-	-	-
Retail Initiative Window/Frame System Labeling	0.703	-	-	-	-	-
HVAC Diagnostic Program (Check-Me)	0.121	-	-	-	-	-
General Support Activities ^[3]	0.182	0.391	0.257	0.029	-	0.029
Sub Total	7.659	11.125	7.139	0.414	1.283	1.697
Residential Subtotal	\$ 30.008	\$ 28.964	\$ 28.987	\$ 3.325	\$ 3.510	\$ 6.835

(Cont'd)

Program	2000 Recorded Expenses	2001 Proposed Budget ^[1]	2001 Proposed Budget ^[2]	YTD		2000 Year-end Actual + Committed
				Actual 03/31/2001	Commitments 03/31/2001	
Nonresidential Programs						
Large Nonresidential Comprehensive Retrofit						
Emerging Technologies	\$ 0.400	\$ 0.200	\$ -	\$ -	\$ -	\$ -
Mass Market Information	-	-	0.170	0.170	-	0.170
Energy Centers - CTAC/AGTAC	0.496	0.513	0.513	0.068	-	0.068
Agricultural/Pumping Services	1.075	1.058	1.058	0.197	-	0.197
Nonresidential SPC	9.162	4.475	0.221	0.009	0.178	0.187
Express Efficiency (Large)	-	-	2.250	0.002	1.252	1.253
Large Commercial Informational Services	0.150	0.066	0.141	0.020	-	0.020
Large Industrial Informational Services	0.150	0.070	0.120	0.018	-	0.018
General Support Activities ^[3]	0.498	0.268	0.202	0.023	-	0.023
Sub Total	11.931	6.650	4.674	0.507	1.429	1.936
Small Nonresidential Comprehensive Retrofit						
Mass Market Information (Statewide)	0.150	0.540	1.097	0.594	-	0.594
Emerging Technologies	0.350	0.200	0.300	0.072	-	0.072
Energy Centers - CTAC/AGTAC	0.332	0.333	0.333	0.045	-	0.045
TPI Administration/Solicitation Process	0.442	0.750	1.910	0.009	-	0.009
Small Business Survey & Services	1.103	0.700	0.685	0.029	-	0.029
Small SPC (Statewide)	2.627	2.500	1.980	0.016	0.557	0.574
Agricultural/Pumping Services	0.499	0.536	0.536	0.101	-	0.101
Express Efficiency (Sm/Med)	3.893	6.433	9.610	0.100	5.641	5.741
Local Government Initiative	-	0.300	0.300	-	-	-
Small Business Space Rental Upgrade	-	0.500	-	-	-	-
General Support Activities ^[3]	0.241	0.466	0.625	0.072	-	0.072
Sub Total	9.637	13.258	17.376	1.038	6.199	7.236
Nonresidential HVAC Turnover						
Emerging Technologies	0.200	0.100	-	-	-	-
Mass Market Information	-	-	0.050	0.050	-	0.050
Energy Centers - CTAC/AGTAC	0.187	0.290	0.290	0.038	-	0.038
TPI Administration/Solicitation Process	-	0.250	0.811	0.004	-	0.004
Express Efficiency - Upstream HVAC	0.863	0.250	0.070	0.004	-	0.004
Express Efficiency (Sm/Med)	-	-	0.060	0.001	0.010	0.011
Express Efficiency (Large)	-	-	0.995	0.001	0.554	0.554
Nonresidential SPC	4.787	4.800	1.980	0.081	1.595	1.677
Large Commercial Informational Services	0.275	0.130	0.180	0.025	-	0.025
Large Industrial Informational Services	0.275	0.080	0.130	0.020	-	0.020
HVAC Commissioning Pilot Program	-	-	0.200	0.001	-	0.001
HVAC Diagnostic Program (Check-Me)	0.119	-	-	-	-	-
General Support Activities ^[3]	0.291	0.310	0.260	0.030	-	0.030
Sub Total	6.997	6.210	5.026	0.254	2.159	2.413

(Cont'd)

Program	2000 Recorded Expenses	2001 Proposed Budget ^[1]	2001 Proposed Budget ^[2]	YTD		2000 Year-end Actual + Committed
				Actual 03/31/2001	Commitments 03/31/2001	
Motor Turnover						
Emerging Technologies	0.100	0.070	-	-	-	-
Mass Market Information	-	-	0.015	0.015	-	0.015
Energy Centers - CTAC/AGTAC	0.124	0.135	0.135	0.020	-	0.020
Agricultural/Pumping Services	0.222	0.262	0.262	0.051	-	0.051
Express Efficiency - Upstream Motors	0.795	0.500	0.330	0.068	-	0.068
Nonresidential SPC	0.609	1.200	0.540	0.022	0.435	0.457
Large Commercial Informational Services	0.050	0.034	0.084	0.012	-	0.012
Large Industrial Informational Services	0.050	0.020	0.070	0.011	-	0.011
Agricultural Energy Efficiency Incentives	0.273	-	-	-	-	-
General Support Activities ^[3]	0.071	0.099	0.072	0.008	-	0.008
Sub Total	2.294	2.320	1.508	0.207	0.435	0.642
Nonresidential Process Overhaul						
Emerging Technologies	0.200	0.080	-	-	-	-
Mass Market Information	-	-	0.015	0.015	-	0.015
Energy Centers - CTAC/AGTAC	0.168	0.170	0.170	0.024	-	0.024
Agricultural/Pumping Services	0.259	0.244	0.244	0.047	-	0.047
Nonresidential SPC	3.287	1.200	0.800	0.033	0.644	0.677
Large Industrial Informational Services	0.335	0.080	0.105	0.016	-	0.016
General Support Activities ^[3]	0.181	0.123	0.078	0.009	-	0.009
Sub Total	4.431	1.897	1.412	0.144	0.644	0.789
Commercial Remodeling Renovation						
Emerging Technologies	0.825	0.900	-	-	-	-
Mass Market Information	-	-	0.066	0.066	-	0.066
Energy Centers - CTAC/AGTAC	0.472	0.485	0.485	0.063	-	0.063
Nonresidential SPC	1.218	1.575	1.486	0.061	1.197	1.258
Express Efficiency (Large)	-	-	1.200	0.001	0.668	0.668
Large Commercial Informational Services	0.250	0.120	0.170	0.024	-	0.024
Large Industrial Informational Services	-	0.100	0.150	0.023	-	0.023
Savings By Design	2.000	1.700	1.150	0.058	0.278	0.336
General Support Activities ^[3]	0.153	0.222	0.198	0.023	-	0.023
Sub Total	4.918	5.102	4.905	0.319	2.142	2.462
Nonresidential Subtotal	\$ 40.207	\$ 35.436	\$ 34.900	\$ 2.469	\$ 13.008	\$ 15.478

Program	2000 Recorded Expenses	2001 Proposed Budget ^[1]	2001 Proposed Budget ^[2]	YTD		2000 Year-end Actual + Committed
				Actual 03/31/2001	Commitments 03/31/2001	
New Construction Programs						
Residential New Construction						
Emerging Technologies	0.200	0.170	-	0.007	-	0.007
Mass Market Information	-	0.030	0.355	0.355	-	0.355
Energy Centers - CTAC/AGTAC	0.128	0.136	0.136	0.017	-	0.017
TPI Administration/Solicitation Process	0.382	0.400	0.892	0.013	-	0.013
Residential New Construction	3.255	3.750	3.100	0.040	0.208	0.248
Local Government Initiatives	-	0.800	0.800	-	-	-
General Support Activities ^[3]	0.087	0.193	0.197	0.023	-	0.023
Sub Total	4.051	5.479	5.480	0.455	0.208	0.663
Commercial New Construction						
Emerging Technologies	0.725	0.600	-	-	-	-
Mass Market Information	-	-	0.077	0.077	-	0.077
Energy Centers - CTAC/AGTAC	0.077	0.108	0.108	0.011	-	0.011
TPI Administration/Solicitation Process	0.402	0.750	0.474	0.007	-	0.007
Savings By Design	2.827	4.500	7.050	0.161	0.639	0.800
Energy Design Resources	1.300	1.200	0.100	0.006	-	0.006
General Support Activities ^[3]	0.134	0.261	0.291	0.033	-	0.033
Sub Total	5.464	7.419	8.100	0.295	0.639	0.934
Industrial and Agricultural New Construction						
Emerging Technologies	0.200	0.200	-	-	-	-
Energy Centers - CTAC/AGTAC	0.060	0.084	0.084	0.010	-	0.010
Savings By Design (statewide)	0.500	0.800	0.800	0.018	0.073	0.091
Energy Efficiency Incentives	0.481	-	-	-	-	-
TPI Administration/Solicitation Process	-	-	-	-	-	-
General Support Activities ^[3]	0.097	0.040	0.033	0.004	-	0.004
Sub Total	1.338	1.124	0.917	0.033	0.073	0.105
New Construction Codes & Standards Support and Local Government Initiatives						
Emerging Technologies	0.700	0.700	0.700	0.059	-	0.059
Energy Centers - CTAC/AGTAC	0.033	0.047	0.047	0.005	-	0.005
TPI Administration/Solicitation Process	0.018	0.250	0.300	0.004	-	0.004
Local Government Initiatives	0.687	0.400	0.385	0.021	-	0.021
General Support Activities ^[3]	0.043	0.051	0.053	0.006	-	0.006
Sub Total	1.481	1.448	1.485	0.095	-	0.095
New Construction Subtotal	12.334	15.469	15.982	0.878	0.919	1.797
TOTALS	\$ 82.548	\$ 79.869	\$ 79.869	\$ 6.673	\$ 17.438	\$ 24.110

Table 6.2
Southern California Edison Company

Energy Efficiency Program Energy and Demand Reductions - YTD 2001

Program	YTD		
	Energy (MWH)	Demand (MW)	Gas (Therms)
Residential Programs			
Heating and Cooling Systems			
Residential Audits	517	0.17	
Local Government Initiative	26	-	
Res EE Procurement Program (REEPP)			
Calif Home Energy Eff Rating System (CHEERS)	30	-	
Mass Market Information			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
General Support Activities ^[3]			
Sub Total	573	0.17	-
Residential Lighting			
Residential Audits	283	0.09	
Local Government Initiative	39	-	
Res EE Procurement Program (REEPP)			
Calif Home Energy Eff Rating System (CHEERS)	30	-	
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Retail Initiative Lighting (Statewide)	16,974	2.70	
General Support Activities ^[3]			
Sub Total	17,326	2.79	-
Residential Appliances			
Residential Audits	234	0.08	
Local Government Initiative	26	-	
Res EE Procurement Program (REEPP)			
Calif Home Energy Eff Rating System (CHEERS)	30	-	
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Residential Spare Refrigerator Recycling	16,974	2.70	
Residential Appliance (D)	383	0.08	
Residential Appliance (U)			
General Support Activities ^[3]			
Sub Total	17,647	2.86	-
Residential Retrofit & Renovation			
Residential Audits	816	0.26	
Local Government Initiative	26	-	
Residential Contractor - Single Family (Statewide)	2,672	0.67	
Residential Contractor - Multi Family (Statewide)	1,084		
Residential Contractor	3,756	0.67	
Res EE Procurement Program (REEPP)			
Calif Home Energy Eff Rating System (CHEERS)	23	-	
Mass Market Information (Statewide)			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Retail Initiative Window/Frame System Labeling			
HVAC Diagnostic Program (Check-Me)			
General Support Activities ^[3]			
Sub Total	4,620	0.93	-
Residential Subtotal	40,165	6.75	-

Table 6.2
Southern California Edison Company

Energy Efficiency Program Energy and Demand Reductions - YTD PY2001

(Cont'd)

Program	YTD		
	Energy (MWH)	Demand (MW)	Gas (Therms)
Nonresidential Programs			
Large Nonresidential Comprehensive Retrofit			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
Agricultural/Pumping Services	4,012	0.86	
Nonresidential SPC	1,737	0.31	
Express Efficiency (Large)			
Large Commercial Informational Services			
Large Industrial Informational Services			
TPI Administration/Solicitation Process			
General Support Activities ^[3]			
Sub Total	5,750	1.17	-
Small Nonresidential Comprehensive Retrofit			
Mass Market Information (Statewide)			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Small Business Survey & Services	1,136	0.20	
Small SPC (Statewide)	4,381	1.09	
Agricultural/Pumping Services	2,033	0.43	
Express Efficiency (Sm/Med)	93,334	26.40	
Local Government Initiative			
Small Business Space Rental Upgrade			
General Support Activities ^[3]			
Sub Total	100,883	28.13	-
Nonresidential HVAC Turnover			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Express Efficiency - Upstream HVAC			
Express Efficiency (Sm/Med)			
Express Efficiency (Large)			
Nonresidential SPC	15,599	2.80	
Large Commercial Informational Services			
Large Industrial Informational Services			
HVAC Commissioning Pilot Program			
HVAC Diagnostic Program (Check-Me)			
General Support Activities ^[3]			
Sub Total	15,599	2.80	-
Motor Turnover			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
Agricultural/Pumping Services	994	0.21	
Express Efficiency - Upstream Motors	277	0.10	
Nonresidential SPC	4,254	0.76	
Large Commercial Informational Services			
Large Industrial Informational Services			
Agricultural Energy Efficiency Incentives			
TPI Administration/Solicitation Process			
General Support Activities ^[3]			
Sub Total	5,525	1.08	-

Table 6.2
Southern California Edison Company

Energy Efficiency Program Energy and Demand Reductions - YTD PY2001

(Cont'd)

Program	YTD		
	Energy (MWH)	Demand (MW)	Gas (Therms)
Nonresidential Process Overhaul			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
Agricultural/Pumping Services	925	0.20	
Nonresidential SPC	6,303	1.13	
Large Industrial Informational Services			
TPI Administration/Solicitation Process			
General Support Activities ^[3]			
Sub Total	7,228	1.33	-
Commercial Remodeling Renovation			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
Nonresidential SPC	11,709	2.10	
Express Efficiency (Large)			
Large Commercial Informational Services			
Large Industrial Informational Services			
Savings By Design	7,430	0.99	
TPI Administration/Solicitation Process			
General Support Activities ^[3]			
Sub Total	19,139	3.10	-
Nonresidential Subtotal	154,124	37.60	-

Table 6.2
Southern California Edison Company

Energy Efficiency Program Energy and Demand Reductions - YTD PY2001

(Cont'd)

Program	YTD		
	Energy (MWH)	Demand (MW)	Gas (Therms)
New Construction Programs			
Residential New Construction			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Residential New Construction	72	0.10	
Local Government Initiatives			
General Support Activities ^[3]			
Sub Total	72	0.10	-
Commercial New Construction			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Savings By Design	4,829	0.88	
Energy Design Resources			
General Support Activities ^[3]			
Sub Total	4,829	0.88	-
Industrial and Agricultural New Construction			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
Savings By Design (statewide)	329	0.05	
Energy Efficiency Incentives			
TPI Administration/Solicitation Process			
General Support Activities ^[3]			
Sub Total	329	0.05	-
New Construction Codes & Standards Support and Local Government Initiatives			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Local Government Initiatives			
General Support Activities ^[3]			
Sub Total	-	-	-
New Construction Subtotal	5,230	1.02	-
TOTALS	199,519	45.37	-

TABLE 6.3
STATEWIDE AND CROSSCUTTING PROGRAM BUDGET AND EXPENDITURE - YTD
 PY 2001
 (\$ millions)

Program	SCE				
	Authorized Budget	Revised Budget	Actual	Commitments	Total
Residential Contractor Program	-	-	-	-	-
Single Family RCP ³	\$ 5.939	\$ 2.669	\$ 0.049	\$ 1.046	\$ 1.095
Multi-Family RCP ⁴	2.439	2.148	0.004	0.152	0.156
Upstream Lighting Program	2.450	3.200	0.009	1.700	1.709
Upstream Appliance Program	0.625	0.250	0.000	-	0.000
Statewide Residential Energy Guide	0.770	0.770	0.023	-	0.023
Large SPC Program	15.750	5.027	0.207	4.050	4.256
Small SPC Program	-	1.500	0.016	0.557	0.574
Express Efficiency Program ¹	6.433	14.115	0.104	5.651	5.755
Statewide Business Energy Guide	0.400	0.385	0.011	-	0.011
Savings By Design Program ²	6.700	9.000	0.238	0.989	1.227
Energy Design Resources Program	1.200	0.100	0.006	-	0.006
Codes and Standards Support Effort	0.700	0.700	0.066	-	0.066
Emerging Technologies	3.300	0.435	0.083	-	0.083
Energy Centers	2.823	2.823	0.349	-	0.349
Statewide Program Total	\$ 49.529	\$ 43.121	\$ 1.167	\$ 14.145	\$ 15.312

¹ PG&E Express Efficiency is downstream only

² PG&E and SDG&E Savings By Design includes only the New Construction Savings By Design

³ Budget for SDG&E Residential Contractor Program Single Family (RCPSF) also includes the savings for the Single Family Rebate

⁴ Budget for SDG&E Residential Contractor Pgm.-MF also includes the Small Complex Self-Sponsorship/ SCSSP and Light. & Appl. Replmt.

TABLE 6.3**STATEWIDE AND CROSSCUTTING PROGRAM BUDGET AND EXPENDITURE - YTD**

PY 2001

(\$ millions)

Program	(Cont'd)				
	Authorized Budget	Revised Budget	PG&E Actual	Commitments	Total
Residential Contractor Program	-	-	-	-	-
Single Family RCP ³	9.28	9.28	0.61	5.75	6.36
Multi-Family RCP ⁴	4.39	4.39	0.03	0.60	0.62
Upstream Lighting Program	1.63	1.63	0.03	0.17	0.19
Upstream Appliance Program	10.90	10.90	0.04	3.22	3.26
Statewide Residential Energy Guide	0.08	0.08	0.02	-	0.02
Large SPC Program	13.21	13.21	0.52	6.07	6.59
Small SPC Program	1.00	1.00	0.43	0.89	1.31
Express Efficiency Program ¹	23.00	23.00	0.73	1.60	2.33
Statewide Business Energy Guide	-	-	-	-	-
Savings By Design Program ²	10.05	10.05	1.44	1.81	3.25
Energy Design Resources Program	1.99	1.99	0.05	-	0.05
Codes and Standards Support Effort	1.41	1.41	0.05	0.07	0.12
Emerging Technologies	0.10	0.10	0.00	-	0.00
Energy Centers	2.80	2.80	0.61	-	0.61
Statewide Program Total	79.83	79.83	4.56	20.17	24.73

¹ PG&E Express Efficiency is downstream only² PG&E and SDG&E Savings By Design includes only the New Construction Savings By Design³ Budget for SDG&E Residential Contractor Program Single Family (RCPSF) also includes the savings for the Single Family Rebate⁴ Budget for SDG&E Residential Contractor Program Multifamily (RCPMF)

also includes the Small Complex Self-Sponsorship/ SCSSP and Lighting and Appliance Replacement

TABLE 6.3**STATEWIDE AND CROSSCUTTING PROGRAM BUDGET AND EXPENDITURE - YTD**

PY 2001

(\$ millions)

(Cont'd)

Program	SoCal Gas				
	Authorized Budget	Revised Budget	Actual	Commitments	Total
Residential Contractor Program	-	-	-	-	-
Single Family RCP ³	4.77	4.22	0.02	1.61	1.63
Multi-Family RCP ⁴	1.10	1.10	0.01	0.18	0.19
Upstream Lighting Program	-	-	-	-	-
Upstream Appliance Program	0.51	0.51	-	0.51	0.51
Statewide Residential Energy Guide	0.13	0.08	-	-	-
Large SPC Program	-	-	-	-	-
Small SPC Program	-	-	-	-	-
Express Efficiency Program ¹	0.51	0.51	-	0.04	0.04
Statewide Business Energy Guide	0.13	0.08	-	-	-
Savings By Design Program ²	1.13	1.13	0.10	0.30	0.40
Energy Design Resources Program	-	-	-	-	-
Codes and Standards Support Effort	0.30	0.30	0.01	-	0.01
Emerging Technologies	2.52	1.73	0.17	0.30	0.47
Energy Centers	1.96	1.96	0.34	-	0.34
Statewide Program Total	13.06	11.62	0.65	2.94	3.59

¹ PG&E Express Efficiency is downstream only² PG&E and SDG&E Savings By Design includes only the New Construction Savings By Design³ Budget for SDG&E Residential Contractor Program Single Family (RCPSF) also includes the savings for the Single Family Rebate⁴ Budget for SDG&E Residential Contractor Program Multifamily (RCPMF)

also includes the Small Complex Self-Sponsorship/ SCSSP and Lighting and Appliance Replacement

TABLE 6.3**STATEWIDE AND CROSSCUTTING PROGRAM BUDGET AND EXPENDITURE - YTD**

PY 2001

(\$ millions)

(Cont'd)

Program	SDG&E				
	Authorized Budget	Revised Budget	Actual	Commitments	Total
Residential Contractor Program	-	-	-	-	-
Single Family RCP ³	4.28	2.93	0.52	0.63	1.15
Multi-Family RCP ⁴	3.17	3.34	0.18	0.45	0.63
Upstream Lighting Program	1.45	0.57	0.04	-	0.04
Upstream Appliance Program	0.33	0.25	0.02	-	0.02
Statewide Residential Energy Guide	0.07	0.06	0.01	-	0.01
Large SPC Program	4.00	4.24	0.08	0.80	0.88
Small SPC Program	0.81	0.81	0.06	0.31	0.37
Express Efficiency Program ¹	4.00	3.98	0.12	0.01	0.13
Statewide Business Energy Guide	0.05	0.03	-	-	-
Savings By Design Program ²	4.62	4.56	0.14	0.20	0.35
Energy Design Resources Program	0.53	0.41	0.04	-	0.04
Codes and Standards Support Effort	0.25	0.24	0.02	-	0.02
Emerging Technologies	0.60	0.25	0.00	-	0.00
Energy Centers	0.40	0.27	0.06	-	0.06
Statewide Program Total	24.55	21.93	1.30	2.40	3.70

¹ PG&E Express Efficiency is downstream only² PG&E and SDG&E Savings By Design includes only the New Construction Savings By Design³ Budget for SDG&E Residential Contractor Program Single Family (RCPSF) also includes the savings for the Single Family Rebate⁴ Budget for SDG&E Residential Contractor Program Multi

also includes the Small Complex Self-Sponsorship/ SCSSP and Lighting and Appliance Replacement

TABLE 6.3**STATEWIDE AND CROSSCUTTING PROGRAM BUDGET AND EXPENDITURE - YTD**

PY 2001

(\$ millions)

(Cont'd)

Program	Statewide Total				
	Authorized Budget	Revised Budget	Actual	Commitments	Total
Residential Contractor Program	-	-	-	-	-
Single Family RCP ³	24.28	19.10	1.21	9.04	10.24
Multi-Family RCP ⁴	11.09	10.98	0.22	1.38	1.60
Upstream Lighting Program	5.53	5.40	0.07	1.87	1.94
Upstream Appliance Program	12.36	11.91	0.06	3.73	3.79
Statewide Residential Energy Guide	1.05	0.99	0.05	-	0.05
Large SPC Program	32.96	22.47	0.80	10.92	11.72
Small SPC Program	1.81	3.31	0.50	1.75	2.25
Express Efficiency Program ¹	33.94	41.61	0.96	7.30	8.26
Statewide Business Energy Guide	0.58	0.49	0.01	-	0.01
Savings By Design Program ²	22.49	24.73	1.91	3.31	5.22
Energy Design Resources Program	3.71	2.50	0.10	-	0.10
Codes and Standards Support Effort	2.66	2.65	0.15	0.07	0.22
Emerging Technologies	6.52	2.52	0.26	0.30	0.56
Energy Centers	7.98	7.86	1.36	-	1.36
Statewide Program Total	166.97	156.50	7.67	39.66	47.33

¹ PG&E Express Efficiency is downstream only² PG&E and SDG&E Savings By Design includes only the New Construction Savings By Design³ Budget for SDG&E Residential Contractor Program Single Family (RCPSF) also includes the savings for the Single Family Rebate⁴ Budget for SDG&E Residential Contractor Program Multifamily (RCPMF)

also includes the Small Complex Self-Sponsorship/ SCSSP and Lighting and Appliance Replacement

TABLE 6.4

STATEWIDE AND CROSS-CUTTING PROGRAM ENERGY AND DEMAND NET REDUCTIONS - YTD
PY 2001

Program	PG&E			SoCal Gas			SoCal Edison			SDG&E			Statewide Total		
	Energy MWh	Demand MW	Gas Therms	Energy MWh	Demand MW	Gas Therms	Energy MWh	Demand MW	Gas Therms	Energy MWh	Demand MW	Gas Therms	Energy MWh	Demand MW	Gas Therms
Residential Contractor Program	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Single Family RCP ³	2,940	4.56	853,336	494	0.12	300,800	2,672	0.67	-	2,647	1.33	169,315	8,753	6.68	1,323,451
Multi-Family RCP ⁴	2,441	0.44	220,287	-	-	614,400	1,084	-	-	8,312	0.47	186,383	11,837	0.91	1,021,070
Upstream Lighting Program	3,343	0.16	-	-	-	-	29,055	26.60	-	4,726	0.48	-	37,124	27.24	-
Upstream Appliance Program	107	0.02	2,070	-	-	-	-	-	-	-	-	-	107	0.02	2,070
Statewide Residential Energy Guide	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Large SPC Program	5,774	0.51	625,323	-	-	-	39,602	7.11	-	4,731	0.72	52,247	50,108	8.34	677,570
Small SPC Program	2,839	0.69	60,494	-	-	-	4,381	1.09	-	2,371	0.43	16,643	9,590	2.21	77,137
Express Efficiency Program ¹	13,397	2.13	-	-	-	26,214	93,334	26.40	-	1,169	0.26	-	107,900	28.79	26,214
Statewide Business Energy Guide	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Savings By Design Program ²	7,504	5.21	-	2,960	0.45	16,000	12,588	1.92	-	2,622	0.43	228	25,674	8.00	16,228
Energy Design Resources Program	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Codes and Standards Support Effort	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Emerging Technologies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Energy Centers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Statewide Program Total	38,345	13.71	1,761,509	3,454	0.57	957,414	182,716	63.79	-	26,579	4.12	424,817	251,093	82.19	3,143,739

¹ PG&E Express Efficiency is downstream only

² PG&E and SDG&E Savings By Design includes only the New Construction Savings By Design

³ Savings for SDG&E Residential Contractor Program Single Family (RCPSP) also includes the savings for the Single Family Rebate

⁴ Savings for SDG&E Residential Contractor Program Multifamily (RCPMF) also includes the Small Complex Self-Sponsorship/ SCSSP and Lighting and Appliance Replacement

Section 7: Market Assessment & Evaluation Studies

*Southern California Edison Company's
Statewide and Utility-Level Evaluation Projects*

Study Area	Project ID	Project Title	Project Description	Project Objective (or milestone addressed for utility-level studies)	Lead Utility	Contact (Project/Area Manager)	Budget	Project Status	Expected Date of Completed Report
Statewide Studies PY 1999									
NONRESIDENTIAL	SW022	PY 1999 Large Nonresidential Standard Performance Contracting (LNRSPC)	Process and Impact study of Statewide 1999 LNRSPC	Recommendations for program improvements for PY2001 and estimate of net energy and demand impacts.	SCE	Pierre Landry	\$ 300,000	Completed	01/15/2001
GENERAL PURPOSE	SW030	Market Share Tracking (1999)	Establish market share baseline for various types of high-efficiency residential measures and track movement of market share over time	To monitor the changing level of energy efficient market shares for various targeted end use measure	SCE	Richard Pulliam	\$ 515,000	Completed	10/20/2000
Total PY1999							\$ 815,000		

**Statewide Studies
PY 2000**

NEW CONSTRUCTION	SW015	NRNC Market Characteristics & Program Activities Tracking	Describe NRNC mkt and track changes over time so that NRNC activities can adapt and prioritize efforts to meet needs of diverse segments. Track activity and penetration of the statewide NRNC program, Savings By Design (SBD).	Develop standardized reports on characteristics of NRNC mkt (construction value & volume, bldg types, owner types, design team characteristics, etc), and present quarterly summary reports.	SCE	Douglas Mahone	\$ 421,000	Data Collection	03/30/2002
NEW CONSTRUCTION	SW016	NRNC Building Efficiency and Program Process Assessment	Data developed on ongoing basis. Quantify whole bldg and end use savings and efficiencies of both SBD part & nonpart bldgs. Collect process data (attitudes, practices) re the Statewide Savings By Design Program by interviewing active program participants as they go through program process. Results will provide immediate feedback to program mgrs and policy makers.	1) Conduct detailed onsite surveys and build DOE-2 models of ea bldg in the sample. Calculate energy savings by end use for whole bldgs. Devp quantifiable info on changes in bldg efficiency attributable to Savings By Design program. 2) Establish an early baseline of program part attitudes & response to Program. Data will be gathered regularly to track changes over time.	SCE	Douglas Mahone	\$ 640,000	Data Collection	03/30/2002

NEW CONSTRUCTION	SW018	NR Codes & Standards	Review and explain C&S statewide program work targeted at Title 24 upgrades in 2001 and 2004.	1) Summarize on-going nonresidential codes and standards work, 2) Highlight linkages with other MT program activities that could feed into C&S area, 3) Project C&S program effects.	SCE	Douglas Mahone	\$ 45,000	Pre-RFP	12/31/2001
NEW CONSTRUCTION	SW019	Relocatable Classrooms	Baseline study and program review of existing pilot program. Market characterization and review of program potential.	1) Characterize market and current actors, 2) Estimate market size and energy savings potential statewide, 3) Review current pilot program findings and successes.	SCE	Douglas Mahone	\$ 75,000	Cancelled	-
NONRESIDENTIAL	SW023	Market Research on Large Nonresidential Customer Wants and Needs	Unique effort to identify the needs and wants of large customers in specific industry segments	Input for program design	SCE	Pierre Landry	\$ 180,000	Completed	03/16/2001
NONRESIDENTIAL	SW024	Market Research on the Decision to Become an Energy Efficiency Service Provider (EESP)	Interviews with EESPs and non EESPs	Performance Contracting performance improvement by bringing in new EESP players	SCE	Pierre Landry	\$ 70,000	Analysis	04/30/2001
NONRESIDENTIAL	SW025	Success Stories of Business to Business Services	Project has been rolled into SW024 for completion and reporting. It is an investigation into the business of providing business services.	Develop business strategies for EESPs in California	SCE	Pierre Landry	\$ -	Rolled into SW024	

NONRESIDENTIAL	SW026	Evaluation of PY2000 Nonresidential SPC Program	Process evaluation with estimates of eventual program impacts	Recommendations for program improvements and estimates of net energy impacts	SCE	Pierre Landry	\$ 165,000	Data Collection	09/30/2001
NONRESIDENTIAL	SW027	Evaluation of PY2000 C/I Energy Efficiency Information Program	Statewide process and impact evaluation for C&I EE Information Programs	1) Determine accomplishment of program objectives. 2) Estimate program net behavioral impact.	SCE	Pierre Landry	\$ 150,000	Cancelled	
GENERAL PURPOSE	SW031	Market Share Tracking (2000)	Establish market share baseline for various types of high-efficiency residential measures and track movement of market share over time	To monitor the changing level of energy efficient market shares for various targeted end use measure	SCE	Richard Pulliam	\$ 477,225	Data Collection	08/30/2001
RESIDENTIAL	SW032	Statewide Study of Customer Remodeling Decisions	Customer decision making study; remodeling scope and components considered; consumer's decision making process including awareness of options and sources of information; reasons for considering remodeling project; importance of various attributes in the cisions including first cost, project features (energy efficiency), installation practices, contractors, subcontractors, etc.	Developing a profile of home owners in CA who plan to or have recently remodeled and developing segmentation. Look at key drivers and see how they affect decision making. Identify barriers to choices of EE, key information, and delivery channels for remodeling.	SCE	Shahana Samiullah	\$ 125,000	Draft Reporting	04/30/2001

RESIDENTIAL	SW033	Process Evaluation of PY 2000 Residential Contracting Program (RCP)	Examine the procedures and processes used to promote and implement the Statewide RPC program and make recommendations for improving procedures and processes.	Document how PY2000 programs were designed & intended to achieve sustainable changes in the mkt in Year 2000. Characterize how they did work. Develop program recommendations to improve future RCP.	SCE	Shahana Samiullah	\$ 110,000	Draft Reporting	04/30/2001	
							Sub-Total PY2000	\$ 2,458,225		
Utility-level Studies PY 2000										
GENERAL PURPOSE	US108	Nonresidential Customer Classification Coding Project	Assigns SIC and NAICS codes for all nonresidential customer accounts	Accurate SIC and NAICS codes for all nonresidential customers. Develop and refine software system for analysis.	SCE	Michael Redding	\$ 120,000	Data Collection	No Report Planned	
GENERAL PURPOSE	US109	Weather Data System Project	Gather, store, and provide access to weather data from the 24 SCE weather stations.	Provide historical and current weather data for energy efficiency analyses.	SCE	Michael Redding	\$ 130,000	Data Collection	No Report Planned	
RESIDENTIAL	US110	Residential Refrigeration Performance Milestone	Identify total and energy efficient retailer floor stock of refrigerators in SCE territory.	Determine change in proportion of energy efficient refrigerator floor stock.	SCE	Shahana Samiullah	\$ 30,000	Completed	04/01/2001	
RESIDENTIAL	US111	Residential Window Performance Milestone	Identify inventory and Energy Star rated inventory and stocking levels	Determine % change in floor stock of Energy Star rated windows	SCE	Shahana Samiullah	\$ 30,000	Completed	04/01/2001	
RESIDENTIAL	US112	Residential Energy Efficient Window Awareness Study	National survey being used to determine residential awareness of energy efficient windows.	Determine customer awareness of high performance windows.	SCE	Marian Brown	\$ 5,000	Completed	05/01/2001	

RESIDENTIAL	US114	New Home Energy Efficiency Milestone Report	Gather data on total new single family homes permitted during 2000 and the number exceeding Title 24 by 10% or more.	Identify proportions of new single family homes exceeding Title 24 by 10% or more. Documentation completed by Program Staff.	SCE	Marian Brown	\$ -	Completed	05/01/2001
RESIDENTIAL	US118	Marketing Training for Residential New Construction Sales Agents	Pre- and post- training testing of builder sales agents on marketing energy efficient features in new construction.	To determine increases in builder staff awareness of opportunities to market energy efficiency. Testing done for PY99 program.	SCE	Marian Brown	\$ -	Cancelled	05/01/2001
NONRESIDENTIAL	US113	Nonresidential HVAC Diagnostic Contractor Survey	Report on contractor technician training and use of HVAC diagnostic tool (CHECKMe!)	Identify the increased number of technicians trained and using the tool. This information will be included in the workpapers of the 2001 AEAP filing.	SCE	Marian Brown	\$ -	Completed	05/01/2001
NONRESIDENTIAL	US115	Small Commercial Do-It-Yourself Energy Survey Study	Evaluate how many measures are implemented, baseline levels, and customer expectations.	To establish baseline estimates of customer adoption rate, and to establish customer expectations.	SCE	Angela Jones	\$ 38,261	Completed	03/30/2001

NONRESIDENTIAL	US116	Evaluation of SCE's Emerging Technology Showcase Program	Two phase evaluation of the emerging technology program. Phase one estimates baseline levels of awareness, attitudes, knowledge and behavior, Phase 2 is devoted to measuring changes in baseline estimates along with any near term market effects.	1) measure baseline awareness of targeted emerging technologies, 2) develop a program theory, hypotheses, and indicators of market effects, 3) measure changes in awareness and any near term market effects of those directly exposed to showcases.	SCE	Angela Jones	\$ 150,000	Between Phases	05/01/2002
NONRESIDENTIAL	US117	Evaluation of SCE's Technology Applications Centers (CTAC & AgTAC)	Market effects and baseline awareness study of CTAC and AgTAC	1) conduct market effects study of CTAC & AgTAC, 2) complete basic process evaluation, 3) conduct a baseline study to assess customer awareness of CTAC and AgTAC.	SCE	Angela Jones	\$ 130,000	Completed	09/11/2000
							Sub-Total		
							PY2000	\$ 633,261	
							Total PY2000	\$ 3,091,486	

**Statewide Studies
PY 2001**

				1. Provide in a single summary study a variety of information on the needs of the res. customer segments, with a particular focus on the segments identified as hard-to-reach: MF housing; tenants; limited-English speaking customers; moderate income customers; and rural customers; 2. Use the information gathered to suggest outreach strategies and pgm. design features to foster greater pgm. participation among hard-to-reach customer groups to promote the res. pgms.; and 3. Use the needs info. to suggest pgm. design features that can increase customer adoption of measures promoted through the res. pgms.					
RESIDENTIAL	SW048	Statewide Residential Customer Needs Assessment Study	This study was sought by some stakeholders and ordered by the Administrative Law Judge on October 25, 2000. The overall research objective is to assess the needs of residential customers, with a particular focus on hard-to-reach customers, as they relate to greater program participation and adoption of energy efficiency measures. Additionally, the intent is to develop outreach strategies and program design features to foster program participation and measure adoption. The proposed study will specially focus on hard-to-reach residential customer segments defined as multi-family housing; tenants; limited-English speaking customers; moderate-income customers; and rural customers.		SCE	Shahana Samiullah	\$ 89,775	Analysis	04/30/2001
							Total PY2001 \$ 89,775		

***Pacific Gas & Electric Company's
Statewide and Utility-Level Evaluation Projects***

Study Area	Project ID	Project Title	Project Description	Project Objective (or milestone addressed for utility-level studies)	Lead Utility	Contact (Project/Area Manager)	Budget	Project Status	Expected Date of Completed Report
<i>Statewide Studies PY 1999</i>									
NEW CONSTRUCTION	SW007	MA&E Efforts in Support of Residential New Construction Programs - 1999	Project provides baseline data on energy efficiency measure saturatioins in new homes and evaluates the 1999 RNC Programs.	Provide information that will ID relevant and desired features that should be adopted in the statewide RNC programs, and to assess effectiveness (via indicators) of current (and potentially new) programs in promoting mkt transformation.	PG&E	Mary Kay Gobris	\$ 105,000	Completed	08/04/2000

NEW CONSTRUC TION	SW011	MA&E Study in Support of Codes & Standards	The Statewide Codes and Standards Study will assess strategies for improving the construction industry's effectiveness in installing energy efficiency measures commonly used to achieve compliance with California's Title 24. It will focus particular attention on building commissioning (in the nonresidential sector), diagnostics (in the residential sector), third party inspections, and linkages between construction quality and liability insurance concerns. This study will also assess how utilities, either informally or through formal PGC-funded programs, can more effectively influence the standards development and implementation process by promoting consensus for incorporation of industry best practices in the standards. In doing so, this study will document how the codes and standards process can work synergistically with PGC-funded programs to achieve stated program objectives.	1) This study should assess strategies for improving the construction industry's effectiveness in installing energy efficiency measures commonly used to achieve compliance with California's Title 24. It should focus particular attention on building commissioning (in the NR sector), diagnostics (in the RES sector), third party inspections, and linkages between construction quality and liability insurance concerns. 2) This study should assess how utilities, either informally or through formal PGC-funded programs, can more effectively influence the standards development and implementation process by promoting consensus for incorporation of industry best practices in the standards. In doing	PG&E	Mary Dimit	\$ 294,615	Completed	08/31/2000
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				so, this study should document how the codes and standards process can work synergistically with PCG-funded programs to achieve stated program objectives.					
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NONRESIDENTIAL	SW035	1999 Small/Medium Nonresidential Evaluation	Market assessment, baseline, and process evaluation of the 1999 small and medium NR programs statewide. Workshops will also be done with this project.	To evaluate the 1999 programs and Input to design 2000 programs	PG&E	Mary O'Drain	\$ 428,470	Completed	12/31/2000
NONRESIDENTIAL	SW040	Development of new method for forecasting and estimation of benefits from market effects	Development of new method for forecasting and estimation of benefits from market effects	To compare and contrast measurement of load impact programs verses market transformation programs	PG&E	Chris Ann Dickerson	\$ 415,000	Completed	03/01/2001
Total PY1999							\$1,243,085		

**Statewide Studies
PY 2000**

NONRESIDENTIAL	SW021	Statewide Industrial Sector Study	1) Existing utility records, program tracking databases and recent evaluations will be used to characterize industrial customers by SIC2 code, energy use, end-use, location, size, history of participation in energy efficiency programs, etc. 2) Search for patterns of success in the industrial mkt sector and identify whether lessons learned can be applied in areas where improvement is currently needed. 3) Work closely with project/area mgrs responsible for other nonres statewide MA&E activities to ensure adequate attention paid to industrial information needs.	1) Detect and analyze patterns related to industrial sector energy efficiency. 2) Instances of successfully transformed industrial mkts will be identified and studied on a case-by-case basis. Primary focus is on demonstration projects and partnerships with integrated energy efficiency/waste reduction/water savings, etc. 3) Track activity specifically related to industrial mkt sector using data from current, ongoing nonres MA&E efforts. A series of industrial-specific MA&E activity reports will be presented as a result of this research.	PG&E	Rafael Friedmann	\$ 200,000	Analysis	05/15/2001
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NONRESIDENTIAL	SW039	Studies of Small/Medium Nonresidential Program Elements	1) Assessment of market potential for energy efficiency in the nonres sector. 2) Continue to study, evaluate & support program interventions in sm nonres mkt. 3) Needs assessment for hard to reach nonres customers. 4) Needs assessment for small nonres customers. 5) MA&E tracking in small nonres sector	Provide initial or updated feedback on programs or intervention strategies not covered in Project SW041. One or more individual or combined mkt assessment and eval studies will be conducted focusing on energy audits, website tools, energy centers, modeling. 2) a) Provide updated info on end-user & supply-side actor energy effic attitudes & practices; b) process eval feedback on py2001 program interventions; 3) Improve understanding of sub-segment differences in efficiency related attitudes, barriers, and practices among nonres customers. Depending on final scope, results of analyses conducted will be used to ID key leverage points by sub-mkt	PG&E	Chris Ann Dickerson	\$ 1,200,000	Project Initiation	12/31/2001
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NEW CONSTRUC TION	SW028	Investigate Builder Compliance to Title 24	This study will provide a baseline for residential new construction practices. The purpose of this study is to determine the barriers to builders not complying with Title 24, the differences between builders who do not comply and builders who exceed Title 24. This study will attempt to determine kinds of incentives are needed to encourage builders to meet Energy Star standards. It will attempt to determine how the July 1999 changes to Title 24 impact builder practices.	Identify proportion of builders who are not complying and to characterize them in terms of noncompliance; demographically (ie climate zone, type of homes built, measure installed, etc.).	PG&E	Mary Kay Gobris	\$ 350,000	Analysis	06/01/2001
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NEW CONSTRUCTION	SW029	Market Effects Tracking of Residential New Construction	This study will examine the impact that each utilities RNC program has on customer awareness of energy efficiency options, builders practices in promoting and implementing greater than Title 24 standards for RNC, Realtors promotion of energy efficient RNC, and how lenders and appraisers consider energy efficiency in the lending and appraisal processes. This is a two year study with comparisons to prior years results. The study for the 2000 program will begin in the first quarter of 2001 and will end by July/Aug 2001. There will be similar dates for the 2001 program.	Scope of this project has changed to reflect less emphasis on market transformation and an increased emphases on impact of builder training programs. Still refining objective and project description.	PG&E	Mary Kay Gobris	\$ 275,000	Data Collection	08/01/2001	
							Total PY2000	\$2,025,000		
Utility-level Studies PY 2000 - There are no MA&E utility specific studies occurring in PY2000										

**Statewide Studies
PY 2001**

RESIDENTIAL	SW049	Summer Initiative Pool Pump Program Evaluation	Market characterization, baseline, and post impact evaluation of the program.	To assess the peak impacts of the pool pumps program.	PG&E	Marty Kurtovich	\$ 181,230	Data Collection	12/30/2001
RESIDENTIAL	SW050	M&V Study for 2001 RNC Programs	This study will estimate the energy impacts from utility sponsored energy efficiency residential new construction programs. This study will determine energy savings from energy efficiency measures that exceed Title 24 requirements. Since Title 24 regulations were revised in July 1999, the previous savings estimates need to be updated to reflect changes in Title 24. The results of this study will be used to prepare estimates of the peak and energy savings impacts of PY 2001 programs.	Using the results of the Title 24 simulation models (Builder Compliance to Title 24) and results of previous evaluations, determine energy savings. This study will utilize the results from Builder Compliance to Title 24 particularly the "as built" building characteristics of residential new construction.	PG&E	Mary Kay Gobris	\$ 250,000	Data Collection	05/15/2002
Total PY2001							\$ 431,230		

*San Diego Gas & Electric Company's
Statewide and Utility-Level Evaluation Projects*

Study Area	Project ID	Project Title	Project Description	Project Objective (or milestone addressed for utility-level studies)	Lead Utility	Contact (Project/Area Manager)	Budget	Project Status	Expected Date of Completed Report
<i>Statewide Studies PY 2000</i>									
RESIDENTIAL	SW010	Implementation of Phase 3 of the Round II Statewide Lighting & Appliance Study	Complete market effects studies that evaluate progress of these programs towards market transformation.	1) Collect pertinent data to track mkt indicators identified in Study Phase 1. 2) Assess mkt effects of energy efficiency programs by: documenting changes, estimating & quantifying hypothesized mkt effects through data collection, linking mkt effects	SDG&E	Rob Rubin	\$ 200,000	Completed	05/01/2001
						<i>Sub-Total PY2000</i>	\$ 200,000		

Utility-level Studies PY 2000

NONRESIDENTIAL	US102	Evaluation of Large Nonresidential Comprehensive Retrofit Program - Seminar	Follow-up survey and analysis	Perform a market assessment and determine the number of seminar attendees that indicate a willingness to adopt energy efficient measures and techniques.	SDG&E	Andrew Sickles	\$ 50,000	Completed	05/01/2001
NONRESIDENTIAL	US103	Evaluation of Small Nonresidential Comprehensive Retrofit Program - High Efficiency Clothes Washer	Follow up survey and analysis	Perform a market assessment and determine the saturation of commercial high efficient clothes washers.	SDG&E	Andrew Sickles	\$ 50,000	Completed	05/01/2001
NONRESIDENTIAL	US104	Evaluation of Nonresidential HVAC Turnover Program	Follow up survey and analysis	Perform a market assessment and determine the ratio of high efficiency HVAC units stocked relative to standard efficiency units.	SDG&E	Andrew Sickles	\$ 70,000	Completed	05/01/2001
NONRESIDENTIAL	US105	Evaluation of Nonresidential Motor Turnover Program	Follow-up survey and analysis	Perform a market assessment and determine the market share (sales) of CEE rated motors	SDG&E	Andrew Sickles	\$ 70,000	Completed	05/01/2001
RESIDENTIAL	US090	Energy Efficient Mortgages	Get a set number of customers to apply for an energy efficient mortgage	Count the number of applications for a home energy rating	SDG&E	Rob Rubin	\$ 70,000	Completed	05/01/2001

RESIDENTIAL	US091	Multi-family Property Owners Performance Contracting	Identify those who offer performance contracting to multi-family property owners/property managers	Count number of contractors offering performance contracting to this group	SDG&E	Rob Rubin	\$ 10,000	Completed	05/01/2001
RESIDENTIAL	US092	RCP Contractor Training	Contractors are trained in duct testing / whole system approach	Measure the number of contractors who complete training / demonstrate required skills by December, 2000	SDG&E	Rob Rubin	\$ 85,000	Completed	05/01/2001
RESIDENTIAL	US093	HVAC Contractor Training	Train contractors to properly use Manuals J & S	Measure the number of contractors who use Manual J & S correctly and compare to the 1999 Baseline.	SDG&E	Rob Rubin	\$ 50,000	Completed	05/01/2001
RESIDENTIAL	US094	Residential Cross-Cutting	Measure the increase of customers who implement of those who receive information	Measure the increase of customers who implement of those who receive information	SDG&E	Rob Rubin	\$ 50,000	Completed	05/01/2001
RESIDENTIAL	US119	Evaluation of Residential Lighting Fixture Manufacturers Program	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the number of fixture manufacturers offering energy efficient products	SDG&E	Rob Rubin	\$ 30,000	Completed	05/01/2001

RESIDENTIAL	US120	Evaluation of Residential Lighting Sales Associates Programs	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the number of lighting sales associates who are knowledgeable and aware of energy efficient lighting products, and the methods to convey information to customers	SDG&E	Rob Rubin	\$ 25,000	Completed	05/01/2001
RESIDENTIAL	US121	Evaluation of Residential Appliances Program	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the floor stock of qualifying Energy Star appliances	SDG&E	Rob Rubin	\$ 25,000	Completed	05/01/2001
RESIDENTIAL	US122	Evaluation of Residential Refrigerator Program	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the floor stock of qualifying Energy Star 2001 DOE compliant refrigerators	SDG&E	Rob Rubin	\$ 25,000	Completed	05/01/2001

RESIDENTIAL	US123	Evaluation of Residential Appliance Sales Associates Program	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the number of appliance sales associates who are knowledgeable and aware of energy efficient appliances	SDG&E	Rob Rubin	\$ 25,000	Completed	05/01/2001	
NEW CONSTRUCTION	US106	Market Assessment Study for Commercial New Construction Program - Whole Building Approach	Follow-up survey and analysis	Perform a market assessment and determine the number of design professionals that demonstrate key concepts of the training.	SDG&E	Kevin McKinley	\$ 50,000	Completed	05/01/2001	
NEW CONSTRUCTION	US107	Market Assessment Study for Commercial New Construction Program - >5% over Title 24 Market Share	Cancelled in lieu of statewide study (SW015)	Perform a market assessment and determine the ratio of floor space (committed or planned) that exceeds Title 24 standards by 5% or more.	SDG&E	Kevin McKinley	\$ 125,000	Cancelled		
							Sub-Total PY2000	\$ 810,000		
							Total PY2000	\$ 1,010,000		

**Statewide Studies
PY 2001**

RESIDENTIAL	SW051	Implementation of Phase 4 of the Round II Statewide Lighting & Appliance Study	Direction of Phase IV is to be decided based on phases 1-3.	0	SDG&E	Rob Rubin	\$ 350,000	Pre-RFP	05/01/2002
RESIDENTIAL	SW052	Residential Ceiling Fans	Determine the potential energy savings of residential ceiling fans to inform future program decision.	Determine actual run hours for fans and lights.	SDG&E	Rob Rubin	\$ 150,000	Project Initiation	05/01/2002
							Total PY2001	\$ 500,000	

*Southern California Gas Company's
Statewide and Utility-Level Evaluation Projects*

Study Area	Project ID	Project Title	Project Description	Project Objective (or milestone addressed for utility-level studies)	Lead Utility	Contact (Project/Area Manager)	Budget	Project Status	Expected Date of Completed Report
<i>Utility-level Studies PY 2000</i>									
NONRESIDENTIAL	US095	Advanced Water Heating Systems	Gather information and collect data to develop estimates of change in the market share of high efficiency water heaters in the small (core) nonresidential market.	The objective of this study is four-fold: 1) to establish the baseline inventory of the market share of nonresidential water heaters in existence in SCG's service territory, 2) to establish the existing ratio of high efficiency (i.e., greater than Title 24 standard) water heaters sold relative to the standard efficiency units, 3) to develop an estimate of the change in the ratio of high efficiency	SCG	Kevin Gerrity	\$ 40,000	Completed	12/31/2000

				<p>water heaters sold relative to the standard efficiency units upon implementation of the Advanced Water Heater Program Element of SCG's Small Nonresidential Comprehensive Retrofit Program, and 4) with respect to nonresidential water heater applications, determining existing market barriers to adoption of high efficiency water heater designs.</p>					
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NONRESIDENTIAL	US096	Advanced Water Heaters and Space Heat Boilers	Gather information and collect data to develop estimates of change in the market share of high efficiency space heat boilers in the small (core) nonresidential market	The objective of this study is four-fold: 1) to establish the baseline inventory of the market share of nonresidential space heat boilers in existence in SCG's service territory, 2) to establish the existing ratio of high efficiency (i.e., greater than Title 24 standard) space heat boilers sold relative to the standard efficiency units, 3) to develop an estimate of the change in the ratio of high efficiency space heat boilers sold relative to the standard efficiency units upon implementation of the Space Conditioning Efficiency Improvement Program Element of SCG's Small Nonresidential Comprehensive Retrofit Program, and 4) with respect to nonresidential	SCG	Kevin Gerrity	\$ 40,000	Completed	12/31/2000
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				space heat boiler applications, determining existing market barriers to adoption of high efficiency space heat boiler designs.					
NONRESIDENTIAL	US097	Catalytic Infrared Heater Study	Baseline inventory of existing market share of catalytic infrared heaters used in industrial processes	Inventory of this type of equipment used in the industrial setting.	SCG	Kevin Gerrity	\$ 40,000	Pre-RFP	06/30/2001
NEW CONSTRUCTION	US098	Energy Advantage Home Market Effects Study		Program re-designed and obviated the need for this study.	SCG	Craig Tyler	\$ 140,000	Cancelled	
RESIDENTIAL	US099	Residential Contractors Program Market Effects Study		This is being done in conjunction with SCE.	SCG	Craig Tyler	\$ 70,000	Cancelled	

RESIDENTIAL	US100	Residential Upstream Water Heater Market Effects Study	Increase the number of plumbers/water heater installers employing 0.60+ EF units as their baseline by 100%	To measure the number of plumbers/water heater installers employing 0.60+ EF units as their baseline	SCG	Craig Tyler	\$ 50,000	Data Collection	05/01/2001	
RESIDENTIAL	US124	Advanced Water Heating Systems - Phase II	Develop an estimate of the change in the ratio of high efficiency (i.e., greater than Title 24) water heaters sold relative to standard efficiency units in PY2000 due to the impact of SoCalGas's statewide Express Efficiency program.	Determine the percent of change of purchased high efficiency water heaters.	SCG	Kevin Gerrity	\$ 35,000	Analysis	05/30/2001	
GENERAL PURPOSE	US101	Third Party Local Government Initiatives Evaluation	1/3 of local TPI projects must satisfactorily complete their deliverables/milestones	Determine what has been done and see if the deliverables have been completed through review of contract and submittal of invoices.	SCG	Craig Tyler	\$ 150,000	Draft Reporting	05/01/2001	
Total PY2000							\$ 565,000			

2000 - 2001 Statewide Projects

*Types of Evaluations within the Ongoing Statewide Projects**

Study Area	Baseline	Compliance	Impact	Market Assessment and/or Characterization	Market Tracking	Other Type of Project	Planning and Scoping	Process
2001 Summer Initiative	1		1	1				
Project is cross cutting of current areas	1			2		2		
RESIDENTIAL								
Residential Retrofit, Renovation, and HVAC				1				1
Residential Lighting and Appliance	1						1	
Residential Market Share Tracking	1				1			
NONRESIDENTIAL								
Large Nonresidential Retrofit and Turnover			1	2				1
Small Nonresidential Retrofit and Turnover	1			1				1
Nonresidential Remodeling and Renovation				3			1	
Nonresidential Market Share Tracking					1			
Industrial	1			1	1			
NEW CONSTRUCTION								
Nonresidential New Construction			1	1	1		1	1
Residential New Construction	2	2	1	2				
Industrial/Agricultural New Construction								
Codes and Standards Support and Local Government Initiatives								
All Areas	8	2	4	14	4	2	3	4

*One project can be put into more than one evaluation type, therefore the numbers shown here are greater than the actual number of evaluations.


200-2001 Statewide Projects

Project Type	MA&E Study Area	Project Number
Baseline	IND	SW021
	RLA	SW052
	RMST	SW031
	RNC	SW028
	RNC	SW050
	SI	SW049
	SNR	SW039
	XCUT	SW044
Compliance	RNC	SW028
	RNC	SW050
Impact	LNR	SW026
	NRNC	SW016
	RNC	SW050
	SI	SW049
Market Assessment and/or Characterization	IND	SW021
	LNR	SW024
	LNR	SW025
	NRNC	SW015
	NRRR	SW012
	NRRR	SW013
	NRRR	SW014
	RNC	SW028
	RNC	SW029
	RRR	SW032
	SI	SW049
	SNR	SW039
	XCUT	SW044
XCUT	SW048	

Project Type	MA&E Study Area	Project Number
Market Tracking	IND	SW021
	NRMST	SW020
	NRNC	SW015
	RMST	SW031
Other Type of Project	XCUT	SW046
	XCUT	SW047
Planning and Scoping	NRNC	SW018
	NRRR	SW012
	RLA	SW052
Process	LNR	SW026
	NRNC	SW016
	RRR	SW033
	SNR	SW039

MA&E Timeline

Study Area	Project ID	Project Name	2001				2002		
			Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1
PG&E - PY 1999									
NEW CONSTRUCTION	SW007	MA&E Efforts in Support of Residential New Construction Programs - 1999	◆ 8/4						
NEW CONSTRUCTION	SW011	MA&E Study in Support of Codes & Standards	◆ 8/31						
NONRESIDENTIAL	SW035	1999Small/Medium Nonresidential Evaluation	◆ 12/31						
NONRESIDENTIAL	SW040	Development of new method for forecasting and estimation of benefits from market effects	◆ 3/1						
PG&E - PY 2000									
NEW CONSTRUCTION	SW028	Investigate Builder Compliance to Title 24	◆ 6/1						
NEW CONSTRUCTION	SW029	Market Effects Tracking of Residential New Construction	◆ 8/1						
NONRESIDENTIAL	SW021	Statewide Industrial Sector Study	◆ 5/15						
NONRESIDENTIAL	SW039	Studies of Small/Medium Nonresidential Program Elements	◆ 12/31						
PG&E - PY 2001									
RESIDENTIAL	SW049	Summer Initiative Pool Pump Program Evaluation	◆ 12/30						
RESIDENTIAL	SW050	M&V Study for 2001RNCProgram	◆ 5/15						
SCE - PY 1999									
GENERAL PURPOSE	SW030	Market Share Tracking (1999)	◆ 10/20						
NONRESIDENTIAL	SW022	PY 1999Large Nonresidential Standard Performance Contracting (LNRSPC)	◆ 1/15						

Study Area	Project ID	Project Name	2001				2002													
			Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3									
SCE - PY 2000																				
GENERAL PURPOSE	SW031	Market Share Tracking (2000)																		
NEW CONSTRUCTION	SW015	NRNCMarket Characteristics & Program Activities Tracking																		◆ 3/30
NEW CONSTRUCTION	SW016	NRNCBuilding Efficiency and Program Process Assessment																		◆ 3/30
NEW CONSTRUCTION	SW018	NR Codes & Standards																		◆ 12/31
NONRESIDENTIAL	SW023	Market Research on Large Nonresidential Customer Wants and Needs																		◆ 3/16
NONRESIDENTIAL	SW024	Market Research on the Decision to Become an Energy Efficiency Service Provider (EESP)																		◆ 4/30
NONRESIDENTIAL	SW025	Success Stories of Business to Business Services																		◆ 4/30
NONRESIDENTIAL	SW026	Evaluation of PY2000Nonresidential SPCProgram																		◆ 9/30
NONRESIDENTIAL	US113	Nonresidential HVACDiagnostic Contractor Survey																		◆ 5/1
NONRESIDENTIAL	US115	Small CommercialDo-It-Yourself Energy Survey Study																		◆ 3/30
NONRESIDENTIAL	US116	Evaluation of SCE'sEmerging Technology Showcase Program																		◆ 5/1
NONRESIDENTIAL	US117	Evaluation of SCE'sTechnology Applications Centers (CTAC & AgTAC)																		◆ 9/11
RESIDENTIAL	SW032	Statewide Study of Customer Remodeling Decisions																		◆ 4/30
RESIDENTIAL	SW033	Process Evaluation of PY2000Residential Contracting Program (RCP)																		◆ 4/30
RESIDENTIAL	US110	Residential Refrigeration Performance Milestone																		◆ 4/1
RESIDENTIAL	US111	Residential Window Performance Milestone																		◆ 4/1
RESIDENTIAL	US112	Residential Energy Efficient Window Awareness Study																		◆ 5/1
RESIDENTIAL	US114	New Home Energy Efficiency Milestone Report																		◆ 5/1

MA&E Timeline (Cont'd)

Study Area	Project ID	Project Name	2001				2002			
			Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3
SCE - PY 2001			◆ 4/30							
RESIDENTIAL	SW048	Statewide Residential Needs Study	◆ 4/30							
SCG - PY 2000			◆							
GENERAL PURPOSE	US101	Third Party Local Government Initiatives Evaluation	◆ 5/1							
NONRESIDENTIAL	US095	Advanced Water Heating Systems	◆ 12/31							
NONRESIDENTIAL	US124	Advanced Water Heating Systems - Phase II	◆ 5/30							
NONRESIDENTIAL	US096	Advanced Water Heaters and Space Heat Boilers	◆ 12/31							
NONRESIDENTIAL	US097	Catalytic Infrared Heater Study	◆ 6/30							
RESIDENTIAL	US100	Residential Upstream Water Heater Market Effects Study	◆ 5/1							
SDG&E - PY 2000			◆							
NEW CONSTRUCTION	US106	Market Assessment Study for Commercial New Construction Program - Awareness	◆ 5/1							
NONRESIDENTIAL	US102	Evaluation of Large Nonresidential Comprehensive Retrofit Program - Seminar	◆ 5/1							
NONRESIDENTIAL	US103	Evaluation of Small Nonresidential Comprehensive Retrofit Program - High Efficient Clothes Washer	◆ 5/1							
NONRESIDENTIAL	US104	Evaluation of Nonresidential HVAC Turnover Program	◆ 5/1							
NONRESIDENTIAL	US105	Evaluation of Nonresidential Motor Turnover Program	◆ 5/1							
RESIDENTIAL	SW010	Implementation of Phase 3 of the Round II Statewide Lighting & Appliance Study	◆ 5/1							
RESIDENTIAL	US090	Energy Efficient Mortgages	◆ 5/1							
RESIDENTIAL	US091	Multi-family Property Owners Performance Contracting	◆ 5/1							
RESIDENTIAL	US092	RCP Contractor Training	◆ 5/1							
RESIDENTIAL	US093	HVAC Contractor Training	◆ 5/1							
RESIDENTIAL	US094	Residential Cross-Cutting	◆ 5/1							
RESIDENTIAL	US119	Residential Lighting Fixture Manufacturers Program	◆ 5/1							

MA&E Timeline (Cont'd)

Study Area	Project ID	Project Name	2001				2002			
			Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3
SCE - PY 2001			◆ 4/30							
RESIDENTIAL	SW048	Statewide Residential Needs Study	◆ 4/30							
SCG - PY 2000			◆ 4/30							
GENERAL PURPOSE	US101	Third Party Local Government Initiatives Evaluation	◆ 5/1							
NONRESIDENTIAL	US095	Advanced Water Heating Systems	◆ 12/31							
NONRESIDENTIAL	US124	Advanced Water Heating Systems - Phase II	◆ 5/30							
NONRESIDENTIAL	US096	Advanced Water Heaters and Space Heat Boilers	◆ 12/31							
NONRESIDENTIAL	US097	Catalytic Infrared Heater Study	◆ 6/30							
RESIDENTIAL	US100	Residential Upstream Water Heater Market Effects Study	◆ 5/1							
SDG&E - PY 2000			◆ 5/1							
NEW CONSTRUCTION	US106	Market Assessment Study for Commercial New Construction Program - Awareness	◆ 5/1							
NONRESIDENTIAL	US102	Evaluation of Large Nonresidential Comprehensive Retrofit Program - Seminar	◆ 5/1							
NONRESIDENTIAL	US103	Evaluation of Small Nonresidential Comprehensive Retrofit Program - High Efficient Clothes Washer	◆ 5/1							
NONRESIDENTIAL	US104	Evaluation of Nonresidential HVAC Turnover Program	◆ 5/1							
NONRESIDENTIAL	US105	Evaluation of Nonresidential Motor Turnover Program	◆ 5/1							
RESIDENTIAL	SW010	Implementation of Phase 3 of the Round II Statewide Lighting & Appliance Study	◆ 5/1							
RESIDENTIAL	US090	Energy Efficient Mortgages	◆ 5/1							
RESIDENTIAL	US091	Multi-family Property Owners Performance Contracting	◆ 5/1							
RESIDENTIAL	US092	RCPC Contractor Training	◆ 5/1							
RESIDENTIAL	US093	HVAC Contractor Training	◆ 5/1							
RESIDENTIAL	US094	Residential Cross-Cutting	◆ 5/1							
RESIDENTIAL	US119	Residential Lighting Fixture Manufacturers Program	◆ 5/1							

MA&E Timeline (Cont'd)

Study Area	Project ID	Project Name	2001				2002			
			Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3
SCE - PY 2001			◆ 4/30							
RESIDENTIAL	SW048	Statewide Residential Needs Study	◆ 4/30							
SCG - PY 2000			◆							
GENERAL PURPOSE	US101	Third Party Local Government Initiatives Evaluation	◆ 5/1							
NONRESIDENTIAL	US095	Advanced Water Heating Systems	◆ 12/31							
NONRESIDENTIAL	US124	Advanced Water Heating Systems - Phase II	◆ 5/30							
NONRESIDENTIAL	US096	Advanced Water Heaters and Space Heat Boilers	◆ 12/31							
NONRESIDENTIAL	US097	Catalytic Infrared Heater Study	◆ 6/30							
RESIDENTIAL	US100	Residential Upstream Water Heater Market Effects Study	◆ 5/1							
SDG&E - PY 2000			◆							
NEW CONSTRUCTION	US106	Market Assessment Study for Commercial New Construction Program - Awareness	◆ 5/1							
NONRESIDENTIAL	US102	Evaluation of Large Nonresidential Comprehensive Retrofit Program - Seminar	◆ 5/1							
NONRESIDENTIAL	US103	Evaluation of Small Nonresidential Comprehensive Retrofit Program - High Efficient Clothes Washer	◆ 5/1							
NONRESIDENTIAL	US104	Evaluation of Nonresidential HVAC Turnover Program	◆ 5/1							
NONRESIDENTIAL	US105	Evaluation of Nonresidential Motor Turnover Program	◆ 5/1							
RESIDENTIAL	SW010	Implementation of Phase 3 of the Round II Statewide Lighting & Appliance Study	◆ 5/1							
RESIDENTIAL	US090	Energy Efficient Mortgages	◆ 5/1							
RESIDENTIAL	US091	Multi-family Property Owners Performance Contracting	◆ 5/1							
RESIDENTIAL	US092	RCP Contractor Training	◆ 5/1							
RESIDENTIAL	US093	HVAC Contractor Training	◆ 5/1							
RESIDENTIAL	US094	Residential Cross-Cutting	◆ 5/1							
RESIDENTIAL	US119	Residential Lighting Fixture Manufacturers Program	◆ 5/1							

MA&E Timeline (Cont'd)

Two dates for the CEC do not show up due to restrictions in software:

SW044 has an estimated completion date of 9/15/03

SW047 has an estimated completion date of 6/30/03

Section 8: Summer Initiative Programs

SCE provides updates below of those Summer 2000 Initiative programs that were authorized on a utility-specific basis, or where SCE was designated as the lead administrator.

Refrigerator Recycling Program

Program Element Summary

In the August 21, 2000 Ruling of Assigned Commissioners and Administrative Law Judge on Summer 2000 Energy Efficiency Initiative, the Commission directed SCE to contract with the Appliance Centers of America (ARCA) to implement a Residential Refrigerator Recycling Program in the service territories of SDG&E and PG&E. In this Ruling, the Commission directed SCE to administer the program for SDG&E and PG&E for purposes of streamlining administration and oversight since SCE already works with ARCA on SCE's existing program.

The Residential Refrigerator Recycling Program targets residential customers in SCE, SDG&E, and PG&E's service territories and provides a cash incentive to customers for recycling their old, inefficient refrigerators or freezers. ARCA picks up the old appliance from the customer's home at no charge and recycles it in an environmentally safe manner. The old appliances are taken to a staging area where they are later trucked to ARCA's recycling facility located in Compton, California.

Activity, Accomplishments, Market Progress and Modifications

The Summer Initiative activities related to this program have been completed in SCE's service territory. The program produced over 14 million kWh of energy savings and 2.4 MW of demand reduction. SCE continues to aggressively offer its Refrigerator Recycling program during 2001.

Pool Efficiency Program

Program Element Summary

The residential PEP! was "piloted" towards the end of summer 2000 by SCE, PG&E, and SDG&E, as a comprehensive swimming pool intervention strategy, designed as a rapid response to reduce demand and energy usage of residential pool pumps.

PEP! is a comprehensive set of swimming pool intervention strategies designed to reduce peak demand, energy consumption, and electric bills for consumers. It is designed to offer residential pool owners, who are receiving service on a non-time-of-use tariff, financial incentives for the purchase and installation of high efficient pool pump efficiency improvements and the re-set of pool pump timers to run during summer off-peak hours. The program also includes an informational element to help build consumer awareness of energy consumption with pools.

Market objectives include: (1) reduction of peak demand by encouraging the operation of pool pumps during off peak hours; (2) reduction in electricity consumption by encouraging the replacement of pool pumps or motors with more energy-efficient units; (3) increase in the consumer awareness of swimming pool efficiencies through an educational campaign directed at pool owners.

Activities, Accomplishment, Market Progress, & Modifications

During 2001, SCE plans to aggressively promote the PEP! in expectation of the higher demand for electricity during the summer months. Program plans include the development of a pool energy guide to acquaint customers with ways to maintain the swimming pool and operate pool equipment efficiently, thereby reducing energy costs.

By June 2001, SCE expects to have approximately 40,000 participants enrolled in the pool pump timer element of the program, which equates to 30 MW of demand reduction. The program also expects to replace 10,000 pool pumps/motors by the end of 2001 equating to approximately 3,500 MWh of energy savings and 12 MW of demand reduction.

As of March 31, 2001, customers have committed to reduce peak demand by 11 MW in 2001. The specific program results are provided below:

Elements	Unit Goal	Actual Units	Pending Units	Total Units	% of Goal
Pool Timer	40,000	0	8,437	8,437	21
Pool Pump	10,000	143	4,500	4,643	46
Totals	50,000	143	12,937	13,080	26

Third Party Initiative Program

Program Element Summary

SCE's Summer Initiative third party initiative (SI TPI) is designed to solicit innovative strategies and technologies from the marketplace. The significant difference for this solicitation, compared to traditional TPI solicitations, is the focus on projects that can be expected to achieve cost-effective peak demand reductions by June, 2001. Projects have a maximum award of \$850,000, and the total award amount for all projects is \$1,700,000.

Activities, Accomplishment, Market Progress, & Modifications:

Four projects were selected from the nineteen proposals received for this program. The projects and their accomplishments as of March 31 are described below.

- A \$304,000 project to design and install energy-efficient lighting systems in the premises of small/medium commercial customers. Most of the funding for this project was committed through signed customer agreements as of March 31. All funds are expected to be spent before the end of the summer, though not all installations will be completed

by June. Some energy and demand savings are in place as of March 31 (0.1 MW of peak demand reduction).

- A \$638,000 project to add brief energy audits to time-of-sale home inspections and to offer customers a rebate for the installation of high-efficiency central air conditioners to replace older, inefficient ones. The contractor has begun offering these audits and has developed the rebate offer, but no rebates have been offered as of March 31. No energy savings or peak demand reductions have yet been documented from this project.
- A \$560,000 project to install evaporative pre-coolers on package air conditioning units on small/medium-sized commercial facilities. A prototype installation has been completed and the report on it is near completion, but no customers have yet signed agreements to participate in this project. The prototype, in PG&E's service territory, is providing a small amount of energy savings and peak demand reductions, but there are no savings yet in SCE's service territory.
- A \$200,000 project to provide rebates for upgrading central air conditioners in new homes from planned standard efficiency units to high efficiency units. This project has experienced difficulty in finding builders at the right stage of the construction process to make near-term installations of higher-efficiency central cooling units. No energy savings or peak demand reductions have yet been achieved from this project.

LED Traffic Signal Rebate Program

Program Element Summary

The LED Traffic Signal Rebate Program is a statewide program designed to encourage public agencies to replace incandescent traffic signals with efficient light emitting diode (LED) versions.

The program provides incentives for the following LED traffic signals:

- Red ball and arrow
- Green ball and arrow
- Amber flashing beacon
- Pedestrian hand
- Pedestrian hand/person combination

The program is designed to achieve demand reductions by June 2001; therefore, incentives of up to 100 percent of the hardware cost (installation cost and sales tax are the responsibility of the participant) will be offered for signals installed by this time. For signals installed after June 2001, incentives are reduced by 50 percent. Incentives are provided for hardwired fixtures only (as available) and must meet the maximum power demand ratings set forth by the program requirements.

Activities, Accomplishment, Market Progress, & Modifications

The three utilities held a number of planning meetings to coordinate this statewide offering. During this planning phase, discussions were also held with various stakeholders including cities and vendors to solicit ideas on incentive pricing, product availability, etc.

Per the schedule set by the Commission, the program was developed and introduced on September 11, 2000. Customer reservation forms were available as of this date. The first reservation was received on September 21, 2000. Program brochures and application materials were being developed through September 30, 2000. As a result of SCE's aggressive outreach during September 2000, the program was fully committed by October 2000. By mid-December 2000, the cities of Westminster and Fountain Valley had completed the retrofitting of all their traffic signals.

As part of SCE's 2001 program proposal, SCE plans to continue the LED-Traffic Signal program in coordination with a similar program offered through the California Energy Commission.

The year-to-inception results are summarized below:

- Total Incentive Budget Committed: \$7,500,000 (100% percent of total authorized budget)
- Total Energy Savings: 37,927 MWh
- Total Demand Reductions: 8.20 MW
- Two cities have completed installation with 32 cities remaining. A number of cities are experiencing longer lead times (e.g., 4 months) for product than previously anticipated.

Although this Summer Initiative program is fully committed, SCE will continue a similar offering to cities through SCE's Express Efficiency Rebate program. Express Efficiency will continue to offer cities financial incentives, up to 50 percent of estimated hardware costs, to encourage the installation of LED traffic signals.

Campus Energy Efficiency Project

Program Element Summary

The Campus Energy Efficiency Project provides a directed incentive for energy demand reduction projects at two campuses in SCE territory. The two campuses are California State University Long Beach (CSULB) and California State Polytechnic University Pomona (Cal Poly). (California State University Dominguez Hills originally proposed a project for this program but has since withdrawn.) CSULB is conducting lighting retrofit projects at several campus buildings for a projected demand reduction of 1,647 kW and energy savings of 3,692,664 kWh. Cal Poly is installing a thermal energy storage system and making modifications to their HVAC system campus for a projected demand reduction of 1,480 kW and energy savings 3,934,713 kWh.

The \$3.5 million incentive budget allocated to this program is split between the two campuses based on the projected energy savings. Incentives through this program will be paid to the

respective campuses in increments of 50 percent up front, 40 percent at project completion and 10 percent upon delivery of a final project report. The final report will be used to report the results of the project and will include such information as project costs and actual per unit demand and energy savings.

Activities, Accomplishment, Market Progress, & Modifications

The Cal Poly Pomona project is completed. SCE was notified by the campus of Cal State Long Beach that it will proceed with a lighting retrofit project. This project is expected to produce approximately 3,600 MWh of annualized energy savings and 1.6 MW of demand reduction by June 2001.

Hard to Reach Program

Program Element Summary

- The program seeks to achieve peak demand savings through the installation of energy efficiency measures at multifamily apartment complexes, mobile home parks, and condominium complexes.
- Offers incentives (posted prices) for a wide variety of measures including: Energy Star lighting equipment, Energy Star refrigerators, Energy Star clothes washers, Energy Star dishwashers, HVAC equipment, thermal shell measures, water heaters, and water flow restrictors.
- Standardized statewide, including incentive levels, procedures, and contracts. The program is open to all project sponsors that have the appropriate licenses, bonding, certification, and insurance to perform the required work.
- Utility administers program; project sponsors identify and sell individual projects based upon an approved marketing plan.

Activities, Accomplishment, Market Progress, & Modifications

As of September 25, 2000, the utilities had filed and served a draft program design, including program manual, for the Hard to Reach Summer Initiative Program.

Based upon concerns regarding implementation issues associated with the initial program design the ALJ ordered that the utilities not accept applications until implementation issues are resolved. This triggered a reworking of the initially proposed program design. The program was redesigned based upon guidance from the Commission (Administrative Law Judge's Ruling on Summer 2000 Energy Efficiency Initiative Issues Related to Implementation of the Hard to Reach Program) and was open for applications on November 8, 2000.

By February 2001, total program funds of \$2.6 million were subscribed with 10 contractors. The 10 contracts and proposed measures of lighting, duct testing and sealing, weatherstripping, water heater blankets, aerators and low-flow showerheads represent 15,000 MWh of annualized energy savings and peak demand reduction of 7.3 MW. Approximately half of the participating project sponsors began installations during the first quarter of 2001. It is expected that at least 50% of each participant's projects will be installed prior to June 1.

Beat the Heat

Program Element Summary

- Statewide program targets commercial and industrial users of halogen torchiere lamps and encourages them to replace those lamps with ENERGY STAR[®] models that save energy and demand, improve building comfort, and eliminate fire danger.
- Program also provides for recycling of halogen torchieres that are replaced.
- Ecos Consulting will provide this program in the service territories of PG&E, SCE and SDG&E. SDG&E will manage the contract with Ecos Consulting.

Activities, Accomplishment, Market Progress, & Modifications

As the program administrator, SDG&E successfully completed contract negotiations with Ecos on behalf of PG&E and SCE. A contract with Ecos Consulting was signed on September 11, 2000.

The research phase that involves characterizing the market and testing the hypotheses about the high incidence of halogen torchiere lighting in commercial spaces was completed. Research identified approximately 1,200 torchieres and thirteen potential participants. Survey results also showed torchieres appear to be concentrated in fewer quantities and at smaller companies than was originally believed. The Ecos Program team is exploring a revised program design to effectively reach this market. An initial order of 3,840 replacement torchieres is currently warehoused at an Ecos Consulting facility in southern California.

As of March 2001, no energy efficient torchieres were installed in SCE's service territory as a result of this Summer Initiative. SCE has received an informal request by the vendor to assist in locating potential customers for this program. SCE has agreed and is awaiting specific instructions from the vendor.

COPE

Program Element Summary

Under direction from the Commission under Decision 00-07-017, Pacific Gas and Electric Company contracted with COPE (the California Oil Producers Electric Cooperative) for peak demand reduction in for the summer of 2001. Under the contract, \$4,000,000 in funding is provided for COPE to run an incentive program for its members in the PG&E and SCE service territories. The program will focus on measures known to reduce peak demand: the contracted MW reduction is 4.6.

Activities, Accomplishment, Market Progress, & Modifications

The contract was executed on September 18, 2000. COPE has developed a detailed program design, and it has been approved by PG&E. PG&E was invoiced and paid \$125,000 for the first deliverable, the program design, in late December.

To date, no energy savings or demand reductions have been reported in association with the COPE Summer Initiative. Nevertheless, COPE has indicated that it expects to fully commit the funds. However, COPE suggests that projects may not be completed by June.

Table 8.1
Summer Initiative Programs
Budget and Expenditures - Inception-to-Date
PY 2001

Program	2000/2001 Authorized Budget	Inception-to-Date			
		Expenditures			
		Actual	Commitment	Total Actual + Committed	Utility Admin. Costs ^[1]
Beat The Heat	\$ 250,000	-	-	-	\$ 3,834
Residential Refrigerator Recycling	1,200,000	1,200,000	-	1,200,000	85,136
Pool Efficiency Program	3,000,000	-	277,840	277,840	208,862
Campus Energy Efficiency Programs [1]	3,500,000	1,750,000	(93,460)	1,656,540	5,090
Residential Hard To Reach	2,600,000	-	2,080,000	2,080,000	55,343
LED Traffic Signal Rebate Program	7,500,000	-	7,500,000	7,500,000	29,579
COPE	1,500,000	-	1,500,000	1,500,000	27,577
TPI Solicitation Process	1,700,000	3,960	1,696,040	1,700,000	20,265
Total	\$21,250,000	\$2,953,960	\$12,960,420	\$ 15,914,380	\$ 435,686

^[1] Included as part of SCE's 2001 Energy Efficiency Budget.

Table 8.2
Summer Initiative Programs
Energy Savings - Inception-to-Date
PY 2001

Program	Inception-to-Date					
	Actual		Committed		Total	
	Energy Savings (MWh)	Demand Reductions (MW)	Energy Savings (MWh)	Demand Reductions (MW)	Energy Savings (MWh)	Demand Reductions (MW)
Beat The Heat	-	-	-	-	-	-
Residential Refrigerator Recycling	14,038	2.40	-	-	14,038	2.40
Pool Efficiency Program			3,336	14.80	3,336	14.80
Campus Energy Efficiency Programs	3,935	1.48	3,692	1.65	7,627	3.13
Residential Hard To Reach	-	-	15,000	7.30	15,000	7.30
LED Traffic Signal Rebate Program	2,649	0.61	34,580	7.59	37,229	8.20
COPE			-	-	-	-
TPI Solicitation Process	11	0.10	3,468	2.30	3,479	2.40
Total	20,633	4.59	60,076	33.64	80,709	38.22

Section 9: General Compliance Issues

Decision 00-07-017 and subsequent Commission rulings and decisions set forth a number of compliance issues that SCE is required to address as part of the quarterly reporting of energy efficiency activities. The following section provides SCE's response to each of these Commission directives.

Decision 00-07-017 - Quarterly Reporting Requirements

Ordering Paragraph 21:

For the RCP, the utilities shall establish a structured, periodic public process, such as workshops, meetings, and focus groups, to receive input and feedback from interested stakeholders, including third party providers and customers, a minimum of twice annually in each service territory. At least one public workshop shall be held in each service territory prior to filing the PY 2001 applications. They shall publicize and distribute proposed program changes prior to the information meetings, distribute adopted program changes to meeting participants and other interested stakeholders as they are made, and report on the process and results of the public forums in the Quarterly Reports. The public input sessions should be widely publicized.

Response:

In 2001, the Commission is holding a series of "all hands" meeting to discuss the status of energy efficiency programs. The first meeting was held on March 2, 2001. At this public-held meeting, SCE presented the status of RCP along with specific programmatic modifications to RCP for 2001.

Ordering Paragraph 29:

The utilities shall report on the statewide lighting and appliance programs in each of the Quarterly Reports and, beginning in PY 2001, shall endeavor, if feasible, to have the third party statewide contractor process rebates for Edison and SoCalGas.

Response:

SCE's report on the statewide lighting and appliance program activities is presented in the Statewide and Crosscutting Section of this report.

Ordering Paragraph 33:

PG&E and Edison shall continue their school-based education programs for PY 2001 and SDG&E and SoCalGas shall conduct pilot tests of these school-based programs in their service territories for PY 2001. The utilities shall monitor the effectiveness of the programs and the changes in awareness and behaviors attributable to the programs and report the results in the Quarterly Reports and in an evaluation report to be submitted to the Energy Division by December 1, 2001. The utilities shall explore the feasibility of a future statewide school-based education strategy using PG&E's and Edison's programs as models.

Response:

Green Schools continued to work with teachers, maintenance personnel and administrators from three school districts (k-12), as well as representatives from a Regional Occupational Program (ROP), which supports 17 school districts. All training was completed for several high school students to become energy auditors at their school sites. At least two of the high school teams and the ROP presented their energy audit findings of their schools to their School Boards, which were positively received.

Historically, students from the ROP build a home each year to learn construction trades. The home is then sold by a local city for profit. This year, for the first time because of SCE's Green Schools' involvement, the students will build an energy-efficient home. Meetings took place to solidify the work plan for filming the energy efficient home. For this project, funds will be sought from the Department of Energy and other vested parties.

All 6,000 **LivingWise®** energy conservation kits were delivered in the 3rd and 4th quarter to 75 different schools in SCE's service territory with over 85% going to schools in rural areas. This program is continuing through school year 2000 – 2001 and has been well received by all participating in the program.

Measurement and Evaluation has begun evaluating the LivingWise® program and the Green Schools programs and expects to complete its evaluation in Summer 2001.

PEAK is a curriculum designed to teach students electrical energy efficiency strategies that can be used in homes and schools. Students learn practical math and science principles behind electricity then, through computer simulation, create and measure energy efficiency actions. Lessons also focus on the importance of saving energy during peak demand periods. An integral part of this program involves a "shared savings" component where students implement energy efficiency at home and parents agree to share any savings associated with bill reductions resulting from their actions. Software has been developed, and students in a public and private school district are currently testing the program and its curriculum.

Ordering Paragraph 37:

In the residential area, the utilities shall offer targeted solicitations to increase provision of energy efficiency services to under-served communities and customer groups already known or identified and include new targeted efforts in the PY 2001 applications, fully explaining the nature of the solicitations and rationale for choosing these efforts. Progress should be reported in the Quarterly Reports.

Response:

For 2001, SCE plans to offer targeted solicitations to hard to reach customers under each for the four program areas. Under the HVAC program, communications will be targeted to rural and non-English speaking customers; technologies will be targeted to moderate income and mobile home customer groups; and the rural, all-electric market will be targeted through AC distributor incentives. SCE will widely promote Residential Audits to increase participation from moderate-income customers and local governments. Mass Market Information will distribute energy guides in five languages. The progress of these activities is discussed in the residential and nonresidential sections of this quarterly report.

Ordering Paragraph 42:

The utilities shall continue efforts to design and implement program elements and intervention strategies to better serve the needs of smaller (small and medium) nonresidential customers and include a special progress report on these efforts as part of their PY 2000 and PY 2001 Quarterly Reports.

Response:

The following activities are a result of SCE targeting the smaller nonresidential customer group:

- A total of 27 presentations to trade associations and other customer groups (ethnic, and other underserved markets) were completed.
- Developed a “Quick Tips” energy guide that will be available in English, Spanish, Korean, and Chinese, and Vietnamese.
- Developed and initiated “Blitz” programs to promote specific technologies to small businesses in targeted areas.
- A total of 165 visits were made to small businesses during the first quarter, which equates to an estimated 40% of the total 2000 accomplishment.
- Completed the draft of eight technical briefs designed for small business customers. These technical briefs inform the customer as to the performance of selected new technologies that can save money. The customer is then walked through a set of simple calculations to help him determine the payback period for implementing the technology.
- Completed the contract for the design, manufacture, emplacement and servicing of 75 – 100 kiosks throughout the Southern California Edison service territory. These kiosks will be placed in high traffic areas targeting both residential and business customers. Special efforts are underway to identify locations that will achieve reaching the “hard to reach” portions of the community.

- Distributed a total of 24,600 copies (12,000 English, 600 Chinese, and 12,000 Spanish) of the energy guide.
- SCE conducted the Express Efficiency contractor/vendor kickoff event focused on serving the needs of smaller business customers. The event was well received by vendors with 175 local vendors in attendance.

Ordering Paragraph 50:

The utilities shall report funds spent and committed in the Quarterly Reports. The reports shall break out spent and committed funds and shall be provided by the fourteen programs as well as by strategy. The PY 2001 program applications shall show three years of comparison data.

Response:

See the 2001 energy efficiency program year-to-date budget and expenditures shown in Table 6.1 of Section 6 within this report. The tables provide spent and committed funds by the fourteen programs as well as by strategy for the first quarter of 2001.

Ordering Paragraph 64:

The utilities shall 1) rename the program from Commercial Remodeling and Renovation to Nonresidential Remodeling and Renovation to clarify that the program is not limited solely to commercial buildings; 2) jointly develop, and use in their Quarterly Reports, a common definition for Nonresidential Remodeling and Renovation activities—including, at a minimum, remodeling, renovation, rehabilitation, and tenant change, assess the magnitude of these activities, and monitor them; 3) monitor the effectiveness of the programs, in a coordinated fashion with other nonresidential new construction and retrofit activities, and modify program elements and intervention strategies, as needed, to ensure gaps do not emerge as a result of program eligibility criteria that do not allow projects to participate, which are neither new construction nor retrofit. The program shall ensure that remodeling and renovation includes all time-dependent remodeling and renovation activities, not solely those that trigger compliance with the State’s Title 24 building codes, or that consist of a two-system change out as Edison proposes.

Response:

SCE administers the Nonresidential Remodeling and Renovation terminology as directed by this OP.

Ordering Paragraph 66:

For nonresidential programs, the utilities shall continue to consider program offerings and increased funding for activities that benefit under-served markets and market segments. For PY 2001, the utilities, together with interested stakeholders, shall 1) develop common working definitions specifically for market segments consisting of smaller nonresidential customers and under-served market events such as remodeling and renovation; 2) assess the size and characteristics of those market segments, including remodeling, renovation, rehabilitation, and

tenant change markets; 3) begin monitoring the availability and delivery of program services and participation using these definitions and report the results in the PY 2001 applications; and 4) offer new targeted solicitations to increase provision of energy efficiency services to underserved markets and market segments already known or identified and include new targeted efforts, fully explaining the nature of the solicitations and rationale for choosing these efforts, and reporting progress in the Quarterly Reports. The results of the needs assessment and monitoring shall be reported in the PY 2001 applications.

Response:

In addition, SCE is proposing new outreach activities in 2001 to enhance customer knowledge of and access to its programs. SCE will work with local government officials and local organizations, including local Chambers of Commerce and a variety of other small business-related associations. SCE will provide information about energy efficiency programs at association meetings and in association publications. They will brief local government officials who work with local businesses to provide referrals to SCE programs. Some of these officials may have particularly good access to customers beginning renovation and remodeling projects. SCE's will place a particular emphasis on work with ethnic and language-based business associations. The status on these 2001 activities is described in the nonresidential section of this report.

Ordering Paragraph 68:

Within 30 days after the effective date of this decision, the utilities shall jointly submit a report to the Energy Division setting forth a coordinated plan for 1) notice of availability; and 2) distribution of the Residential and Business Energy Guides. The plan shall include both a statewide component for publicizing the availability of the Energy Guides, in English, Spanish, and Chinese, and local components for publicizing the availability of the Guides in all three languages and for distributing the Guides. The local component shall include plans for working with Community Based Organizations (CBOs) in publicizing and distributing the Guides and for distributing the Guides through home improvement stores and other appropriate distribution points. The utilities' plan shall provide for implementation as soon as the program is approved. The utilities shall include both descriptions of actions taken to publicize and distribute the Guides and the results of its actions in the Quarterly Reports.

Response:

The Energy Guides have been revised to focus on how customers can immediately reduce energy consumption and how they can participate in other energy efficiency programs. These new "Quick Tips" energy guides will be available in five different languages. Delivery channels include: phone centers, home/trade shows and fairs, energy centers, other energy efficiency program activities, and community-based organizations. For 2001, SCE is piloting the use of kiosks. The energy guides will be placed at these kiosk locations. These kiosks will be placed in high traffic areas targeting both residential and business customers. Special efforts are underway to identify locations that will achieve reaching the "hard to reach" portions of the community. Specific year-to-date results on the distribution of energy guides are shown in the residential and nonresidential sections of this report.

Ordering Paragraph 70:

The utilities shall continue coordination of the energy centers for PY 2000 and PY 2001, with particular emphasis on eliminating duplication. For PY 2001, the utilities shall prepare a plan for the accelerated commercialization of all products (especially software and design tools) developed at or through the centers and to distribute these products in a timely manner. Edison and SoCalGas shall take all reasonable efforts to ensure fuel-and-administrator-neutrality in the messages conveyed by the centers, and, for PY 2001, shall explore joint operation of their energy centers or conducting activities jointly at all centers. Edison and SoCalGas shall report on their efforts in the PY 2001 applications. The utilities shall report on the activities undertaken to coordinate the Energy Centers in the Quarterly Reports, specifically identifying actions taken to implement the directions set forth herein. For PY 2001, the utilities shall consider REECH's proposal for placing kiosks in home improvement centers and hardware stores, and in the PY 2001 applications, report the reasons such activities have or have not been implemented.

Response:

A description of coordination activities are detailed in the energy centers program results within this report. In summary, three of the state's investor owned utilities, SCE, PG&E, and SoCalGas, operate energy centers.

In response to the Commission suggestion to utilize home improvement or hardware stores, SCE has contracted to have 75 - 100 kiosks designed, manufactured, emplaced and serviced at selected high traffic areas in the service territory. It is expected that emplacements will begin in the month of May. These kiosks will contain energy efficiency handouts for both the residential and small business customers such as the Residential Energy Guide and the Business Energy Guide. Special efforts to find suitable high traffic areas that are frequented by the "hard to reach" segments of the community are underway.

Ordering Paragraph 75:

For the rest of PY 2000 and for PY 2001, the utilities shall monitor their TPI solicitations and report in the Quarterly Reports any experience they have with the reluctance of third parties to participate in the TPI program because of our treatment of intellectual property.

Response:

SCE has not experienced any reluctance from third parties to participate in the TPI solicitation process due to the treatment of intellectual properties.

Ordering Paragraph 88:

The utilities shall jointly with interested stakeholders develop a schedule for a regular public input process, including workshops, meetings, and focus groups, and to do so in a manner that ensures timely input before decisions are made and feedback after decisions are finalized. The utilities shall report on the process and the results of the workshops, meetings, and focus groups

in the Quarterly Reports. The Energy Division shall work with the utilities and interested stakeholders to develop a process for coordinating utility-sponsored sessions with Commission-sponsored workshops and for quickly reviewing and approving program revisions agreed upon in utility-sponsored sessions.

Response:

The Commission has created monthly “all hands meeting” to discuss the progress of the 2001 energy efficiency programs. The Commission held the first meeting on March 2, 2001. At that meeting, SCE presented its 2001 program modification and year-to-date program performance. These program modifications are shown in the program summary sections to this report.

Ordering Paragraph 91:

The utilities shall file Quarterly Program and Expenditure Reports with the Energy Division and serve the Reports on the service list for this proceeding. The Reports shall be filed as soon as possible but no later than six (6) weeks after the close of each quarter and shall contain:

- a. The information and data provided for PY 1999;*
- b. Participation activity, budgets, and expenditures, including commitments, for 1) the 14 programs and all elements and strategies thereunder; 2) all statewide programs, broken down by the 14 programs and all elements and strategies thereunder; and 3) all cross-cutting measures broken down by the 14 programs and all elements and strategies thereunder;*
- c. Expenditures shall be itemized, at minimum, to show what the money was spent on, e.g., vouchers redeemed, workshops and training, promotional activities;*
- d. Tables shall be provided showing expenditures by customer class code, as described earlier;*
- e. A status update on all programs, program activities, program elements, and statewide MA&E studies, an update on statewide coordination activities, an update on market progress, and an update on all actions the utilities have been directed to take in this decision; and*
- f. Joint summary tables showing the requested data for the statewide programs.*

The utilities shall meet and confer prior to filing the Quarterly Reports and shall adopt a common format. After receipt of the Quarterly Reports, the Energy Division shall develop and conduct a public process for review of the Reports.

Response:

After discussion with each other and the Energy Division on the content and format of the Quarterly Report and compliance with Ordering Paragraph 91, SCE submits this 1st Quarter Report on the 2001 energy efficiency programs.

Ruling On Cost Effectiveness Issues For PY 2001 Programs

Dated: October 25, 2000

Direction (pp.22-23):

The utilities should perform the saturation analysis as new data is obtained and, for all measures, at least annually, which should be reflected in the applicable Quarterly Reports and the Annual Report. The utilities should update the saturation data in each quarterly report and the Annual Report.

Response:

SCE filed its saturation analysis in SCE's 2001 energy efficiency program application (A.00-11-043). No new data was obtained during the first quarter.

Ruling On Summer 2000 Energy Efficiency Initiative

Dated: September 7, 2000

Direction (p.7):

Op 4 - Administrative costs incurred by the utilities, if any, shall come from program funds outside the \$67 million reserved for the Summer Initiative. The utilities shall separately track the administrative costs incurred for each and every Summer Initiative Program and report on those costs in all reports to the Commission, including quarterly progress reports and the annual reports. The reports shall provide a detailed breakdown of costs incurred.

Response:

SCE's administrative costs incurred in support of the Summer Initiative is detailed in the Summer Initiative Section to this report.

***Ruling of Assigned Commissioners And Administrative Law Judge On Summer
2000 Energy Efficiency Initiative***

Dated: August 21, 2000

Direction (p.7):

OP 13 - The utilities shall track and report on the progress of Summer Initiative programs in all reports to the Commission, including quarterly progress reports.

Response:

The progress of SCE's Summer Initiative is presented in the Summer Initiative Section contained within this report.

Administrative Law Judge's Ruling Scheduling Workshop And Ordering The Filing of Pre-workshop Statements

Dated: July 11, 2000

Direction (Attachment A, p.3):

9. For the RCP, the utilities shall establish a structured, periodic public process, such as workshops, meetings, and focus groups, to receive input and feedback from interested stakeholders, including third party providers and customers, a minimum of twice annually in each service territory. At least one public workshop shall be held in each service territory prior to filing the PY 2001 applications. They shall publicize and distribute proposed program changes prior to the information meetings, distribute adopted program changes to meeting participants and other interested stakeholders as they are made, and report on the process and results of the public forums in the Quarterly Reports. The public input sessions should be widely publicized. (OP 21)

Response:

See SCE's Response to Ordering Paragraph 21 presented earlier in this section.

Direction (Attachment A, p.7):

21. The utilities shall convene a public process to obtain input into program structure, design, and implementation of both the Large and Small SPC programs, and proposed revisions to the programs, a minimum of twice a year in each service territory. The utilities shall conduct at least one such session prior to filing the PY 2001 applications, focusing on the issues raised by interested stakeholders to date, including the application process, paperwork, and M&V requirements, and considering the modification of corporate parent caps in accordance with our prior direction. The utilities shall report on these sessions, including the process used, the agreements reached, and the remaining areas of disagreement in the Quarterly Reports and in the PY 2001 program application. (OP 61)

Response:

See SCE's Response to Ordering Paragraph 61 presented earlier in this section.

Direction (Attachment A, pp.7-8):

22. The utilities shall 1) rename the program from Commercial Remodeling and Renovation to Nonresidential Remodeling and Renovation to clarify that the program is not limited solely to commercial buildings; 2) jointly develop, and use in their Quarterly Reports, a common definition for Nonresidential Remodeling and Renovation activities—including, at a minimum, remodeling, renovation, rehabilitation, and tenant change, assess the magnitude of these activities, and monitor them; 3) monitor the effectiveness of the programs, in a coordinated fashion with other nonresidential new construction and retrofit activities, and modify program elements and intervention strategies, as needed, to ensure gaps do not emerge as a result of program eligibility criteria that do not allow projects to participate, which are neither new

construction nor retrofit. The program shall ensure that remodeling and renovation includes all time-dependent remodeling and renovation activities, not solely those that trigger compliance with the State's Title 24 building codes, or that consist of a two-system change out as Edison proposes. (OP 64)

Response:

See SCE's Response to Ordering Paragraph 64 presented earlier in this section.

Direction:

OP 24 - For nonresidential programs, the utilities shall continue to consider program offerings and increased funding for activities that benefit under-served markets and market segments. For PY 2001, the utilities, together with interested stakeholders, shall 1) develop common working definitions specifically for market segments consisting of smaller nonresidential customers and under-served market events such as remodeling and renovation; 2) assess the size and characteristics of those market segments, including remodeling, renovation, rehabilitation, and tenant change markets; 3) begin monitoring the availability and delivery of program services and participation using these definitions and report the results in the PY 2001 applications; and 4) offer new targeted solicitations to increase provision of energy efficiency services to under-served markets and market segments already known or identified and include new targeted efforts, fully explaining the nature of the solicitations and rationale for choosing these efforts, and reporting progress in the Quarterly Reports. The results of the needs assessment and monitoring shall be reported in the PY 2001 applications. (OP 66)

Response:

See SCE's Response to Ordering Paragraph 66 presented earlier in this section.

Direction (Attachment A, p. 11):

30. The utilities shall jointly with interested stakeholders develop a schedule for a regular public input process, including workshops, meetings, and focus groups, and to do so in a manner that ensures timely input before decisions are made and feedback after decisions are finalized. The utilities shall report on the process and the results of the workshops, meetings, and focus groups in the Quarterly Reports. The Energy Division shall work with the utilities and interested stakeholders to develop a process for coordinating utility-sponsored sessions with Commission-sponsored workshops and for quickly reviewing and approving program revisions agreed upon in utility-sponsored sessions.(OP88)

Response:

See SCE's Response to Ordering Paragraph 88 presented earlier in this section.

Direction (Attachment A, pp.11-12):

32. The utilities shall file Quarterly Program and Expenditure Reports with the Energy Division and serve the Reports on the service list for this proceeding. The Reports shall be filed as soon as possible but no later than six (6) weeks after the close of each quarter and shall contain:

- a. The information and data provided for PY 1999;*

- b. Participation activity, budgets, and expenditures, including commitments, for 1) the 14 programs and all elements and strategies thereunder; 2) all statewide programs, broken down by the 14 programs and all elements and strategies thereunder; and 3) all cross-cutting measures broken down by the 14 programs and all elements and strategies thereunder;*
- c. Expenditures shall be itemized, at minimum, to show what the money was spent on, e.g., vouchers redeemed, workshops and training, promotional activities;*
- d. Tables shall be provided showing expenditures by customer class code, as described earlier;*
- e. A status update on all programs, program activities, program elements, and statewide MA&E studies, an update on statewide coordination activities, an update on market progress, and an update on all actions the utilities have been directed to take in this decision; and*
- f. Joint summary tables showing the requested data for the statewide programs.*

The utilities shall meet and confer prior to filing the Quarterly Reports and shall adopt a common format. After receipt of the Quarterly Reports, the Energy Division shall develop and conduct a public process for review of the Reports. (OP 91)

Response:

See SCE's Response to Ordering Paragraph 91 presented earlier in this section.

Decision 00-07-017 – 2001 Energy Efficiency Program Plans And Budget

Dated: January 31, 2001

Ordering Paragraph 3:

3. *The utilities are authorized to implement their Program Year 2001, effective January 1, 2001, with the following modifications:*
 - a. *The utilities shall be allowed to shift funds only within the three program areas (residential, nonresidential, and new construction), subject to the overarching principles of equity and targeting underserved markets. The new construction market shall remain separate for fund-shifting purposes. The utilities must chronicle the changes in the program emphasis and funding in their April quarterly reports.*
 - b. *The utilities shall budget a minimum of 20% of the total program budget for New Construction.*
 - c. *The utilities shall budget a minimum of 8% for third party initiatives (TPI), excluding funds committed for the Summer Initiative. The utilities' proposed budgets for PY 2001 programs, including carry-over funds and balancing account interest, are authorized.*

Response to Ordering Paragraph 3.a:

In order to achieve the maximum feasible reductions in uneconomic and peak electricity consumption while assuring harder to reach customers are afforded these programs, SCE has expanded and accelerated program and program delivery in 2001. These specific programmatic changes are chronicled in the various program summaries with the 1st Quarter energy efficiency report. The modified 2001 energy efficiency budget is also shown in Table 6.1 of Section 6.

Ordering Paragraph 8:

8. The utilities shall provide estimations of energy demand savings for the first half of 2001 in their June quarterly reports.

Response:

SCE 2001 energy efficiency year-to-date results on energy and demand savings are shown in Table 6.2 of Section 6 to this report. SCE will also provide estimates of energy and demand savings in their 2nd Quarter (June) report.