



SOUTHERN CALIFORNIA  
**EDISON**

An *EDISON INTERNATIONAL* Company

(U 338-E)

Rulemaking No. 01-08-028

**Southern California Edison Company's  
2003 Energy Efficiency Programs  
Fourth Quarter Report  
PRELIMINARY**

February 2004

**Southern California Edison Company's  
2003 Energy Efficiency Programs  
Fourth Quarter Report  
PRELIMINARY**

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**2003 Energy Efficiency Quarterly Report Narrative – Preliminary Results  
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**4<sup>th</sup> Quarter Report: October 1, 2003 through December 31, 2003**

Program Title: **Residential Appliance Recycling Program**

**I. Program Overview**

The Residential Appliance Recycling Program (RARP) is a statewide investor-owned utilities program designed to reduce energy usage by allowing eligible residential customers (single family and multifamily owners/landlords and tenants) to dispose of their working, inefficient primary and secondary refrigerators and freezers in an environmentally safe manner. Two units, refrigerators or freezers, may be recycled per customer service location per program year. Participation is on a first-come, first serve basis. A recycling incentive of \$35 or a five-pack of compact fluorescent lamps (CFLs) is offered to customers who turn in working units between 14-27 cubic feet.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$6,000,000
Preliminary Program Expenditures (includes program commitments)*	\$5,751,648

\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

2. Total net demand reduction and energy savings:

	<b>Net kW*</b>	<b>Net kWh*</b>	<b>Refrigerators</b>	<b>Freezers</b>
<b>Target</b>	5,987	38,618,794	26,888	6,722
<b>Actual</b>	5,657	35,883,420	28,394	2,826
<b>Committed</b>	591	3,769,197	2,981	302
<b>Total Recorded</b>	6,248	39,652,617	31,375	3,128

\*Per Decision 03-04-055, Table 2b.

3. Total number of units:

Projected: 33,610

Actual: 34,503

4. Projected and actual number of units:

Please refer to program activity tables in corresponding program workbook.

5. Total incentive (\$) paid:

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**4<sup>th</sup> Quarter Report: October 1, 2003 through December 31, 2003**

Paid = \$4,602,001; Committed = \$445,575.

**III. Program Implementation Status**

1. Status of program delivery

The 2003 program was implemented as approved by the California Public Utilities Commission (CPUC) effective April 2003. As directed by the CPUC in Decision 03-04-055, SCE issued a competitive Request for Proposal (RFP) for recycling services. As a result of the competitive RFP solicitation, the incumbent vendor was selected in the third quarter to continue to implement the remainder of the 2003 program in SCE’s service territory.

2. Customer Enrollment

Two blank copies of the 2002 Appliance Recycling program application forms were sent to the CPUC’s Energy Division.

3. Workbook

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

4. Training

The program did not sponsor any training during the quarter.

5. Marketing

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/Each Method</b>
SCE bill message	922 K residential HTR customers	Included in the November billing cycle	Varied based on billing cycle schedule
Newspaper ads	553 K circulation to primarily residential HTR customers	Ads ran three times in November	Each ad run in 9 daily newspaper publications
Press release	one release	Placed on media wire in November and sent to Flex Your Power for use in media kits	Varied based on number that pulled release off wire
Newspaper ads	1,166 K circulation to primarily residential HTR customers	Ads ran between 12/9 and 12/27	Ads placed in 16 newspapers with some running up to 6 times

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6. Hard to Reach

The hard-to-reach (HTR) target filed for 2003 is 57 percent as identified by the HTR categories used for this program. For the entire 2003 program year, 57 percent of RARP participants were from HTR markets. The majority of marketing activities for RARP in the fourth quarter focused on the HTR markets to reach the targeted goal for 2003.

**IV. Program Accomplishments**

SCE's Refrigerator Recycling Program met not only its energy savings and demand reduction targets but also its hard-to-reach goal.

**V. Program Challenges**

Significant efforts continued in the fourth quarter to market the RARP to HTR customers. These efforts included a bill message to HTR customers in the November billing cycle, and newspaper ads placed in November and December that covered primarily HTR areas. These significant efforts allowed us to meet the HTR goal.

**VI. Customer Disputes**

None

**VII. Compliance Items**

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

**Decision 03-01-038, Ordering Paragraph 3, states:**

*"To prevent service disruption, we authorize the IOUs whose programs will expire at the end of 2002 to continue those programs through March 31, 2003, using Public Goods Charge collections from that period, in the amounts set forth in the body of this decision. If the Commission issues a decision on 2003 program applications prior to that time, this "bridge funding" shall expire upon issuance of that decision. If the IOUs incur expenses in 2003 before the Commission issues this decision, they should track those expenses and account for such expenses in their reports to the Commission on first quarter 2003 program results. The IOUs can request recovery of these expenditures through their respective PGC energy efficiency balancing accounts."*

**Response:**

The IOUs continued the 2002 programs through March 31, 2003. Expenses prior to the issuance of the decision and bridge funding expenditures through March 31, 2003 are reported in each program's text and Workbook.

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**Decision 03-01-038, Ordering Paragraph 4, states:**

*“The IOUs shall include the program accomplishments achieved during the bridge funding period toward the cumulative goals of their 2003 programs.”*

Response:

All accomplishments during the bridge funding period will be included toward the cumulative goals of the 2003 programs.

**Decision 03-03-028, Ordering Paragraph 1, states:**

*“To prevent program disruption, we authorize the utilities whose programs expire at the end of 2002 to continue those programs beyond March 31, 2003, using Public Goods Charge collections from associated periods, in the amounts set forth in the body of this decision.”*

Response:

The IOUs continued the 2002 programs beyond March 31, 2003.

**Decision 03-03-028, Ordering Paragraph 2, states:**

*“The utilities are hereby authorized additional bridge funding at a level of 7% a month against the total 2003 utility funding amounts set forth in Decision (D.) 03-01-038 so that the bridge funding, plus funding for new 2003 programs, equal the total amounts described in D. 03-01-038.”*

Response:

The IOUs continued the 2002 programs using the additional bridge funding at the level specified.

**Decision 03-04-055, Attachment 2, pp.6-7, states:**

*“The program administrator (SCE) will issue a competitive RFP for the recycling services associated with the 2003 RARP.”*

Response:

During the third quarter, SCE issued a competitive RFP for the recycling services for the 2003 RARP. The current vendor was selected as a result of the competitive RFP.

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**4<sup>th</sup> Quarter Report: October 1, 2003 through December 31, 2003**

**Attachment A  
Program Results Workbook**

**2003 Energy Efficiency Quarterly Report Narrative – Preliminary Results  
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**4<sup>th</sup> Quarter Report: October 1, 2003 through December 31, 2003**

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

**I. Program Overview**

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

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget*	\$7,116,000
Preliminary Program Expenditures (includes program commitments)**	\$7,176,108

Original budget was \$6,000,000. An additional \$1,116,000 was authorized by an AJL ruling issued on December 3, 2003.

\*\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

2. Total net demand reduction and energy savings:

	<b>Net kW</b>	<b>Net kWh</b>
<b>Program Target*</b>	14,542	23,857,849
<b>Actual</b>	13,816	21,293,731
<b>Committed</b>	1,261	1,678,291
<b>Total Actual and Committed (Recorded)</b>	15,077	22,972,022

\*Per Decision 03-04-055, Table 2b, SCE was directed to modify the pool pump and motor energy savings values and targets. Targets were further adjusted on December 3, 2003, commensurate with the additional \$1,116,000 authorized by the Commission.

3. Total number of customers served:

Projected: 38,000

Actual: 33,732

4. Projected and actual number of units:

Please refer to program activity tables in corresponding program workbook.

5. Total rebate (\$) paid: \$



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**4<sup>th</sup> Quarter Report: October 1, 2003 through December 31, 2003**

Paid = \$5,085,210 Committed = \$424,676

**III. Program Implementation Status**

1. Status of program delivery – The statewide team worked jointly to continue aggressive implementation of the 2003 Single Family Rebate program.

Statewide activities included:

- The statewide team conducted regular conference calls throughout the quarter to monitor the status of the 2003 program and to prepare for changes expected to make the 2004 – 2005 program more effective.
- The California IOUs attended the ENERGY STAR<sup>®</sup> HVAC meeting in Portland, Oregon in October 2003. This meeting represented an opportunity for key industry participants to meet and exchange ideas on how to better influence the market.
- The statewide team met in person in Fontana, California, on November 3, 2003, to discuss the current program’s progress and to finalize details for the 2004 program.
- The 2003 program was successfully closed on December 31, 2003.

2. Customer Enrollment

Sample copies of program applications were sent to the California Public Utilities Commission’s Energy Division.

3. Workbook

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

4. Training

There was no statewide training during the fourth quarter.

5. Marketing

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/ Each Method</b>
Direct mailer-- Programmable Thermostats	102,901	Mail	102,901
Applications - English	2,200	Mail	2,200
Applications - Spanish	44,663	Internet Download	44,663
	761	Internet Download	761

6. Hard to Reach

The HTR target for 2003 is to have 34 percent of the rebate applications come from HTR customers. As of the third quarter, 39 percent of the paid rebate applications came from HTR customers.

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**IV. Program Accomplishments**

Statewide Fourth Quarter Activities

Statewide utilities worked jointly to continue the uniform implementation of the 2003 Single Family Rebate program. Statewide activities included.

- Submitted filing for the 2004 - 2005 Single Family Energy Efficiency Rebate program consisting of a more robust set of measures and opportunities for participants and hard-to-reach customers.
- Conducted meetings with major industry HVAC partners in Washington DC, and Boston.
- Attended ENERGY STAR<sup>®</sup> HVAC Conference in Portland, Oregon.

SCE Fourth Quarter Activities

- Targeted brochure promoting Programmable Thermostats was sent to 102,901 customers who are on the Air Conditioning Cycling Program.
- SCE achieved full subscription for the program and requested additional funds to keep the program open and to avoid declining several thousand applications. The need for additional funds was supported by the significant download of applications from our website, among which were almost 15,000 HVAC downloads. On December 3, 2003, an ALJ ruling approved SCE's request for an additional \$1,116,000 of incentives. All of these funds were committed to rebates.

**V. Program Challenges**

There were no program challenges during the fourth quarter.

**VI. Customer Disputes**

No customer disputes to report.

**VII. Compliance Items**

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Program Results Workbook**

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**4th Quarter Report: October 1, 2003 through December 31, 2003**

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

**I. Program Overview**

The Multifamily Energy Efficiency Rebate program is a statewide consistent program, which provides a broad list of qualifying energy efficiency measures with prescribed rebates for the installation of qualifying energy-efficient improvements in apartment dwelling units and in the common areas of apartment and condominium complexes, and common areas of mobile home parks. Property owners and property managers of existing residential multifamily complexes with 5 or more dwelling units may qualify. The program is uniform throughout all the IOU's service areas, with consistent terms and requirements and implementation characteristics, including rebate levels and application procedures.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget*	\$2,100,000
Preliminary Program Expenditures (includes program commitments)**	\$2,117,092

\* On December 3, 2003, an ALJ Ruling was issued granting SCE the authority to shift \$100,000 from the 2002 unspent, uncommitted 2002 funds from the Residential Retrofit category to the 2003 Multifamily Rebate program. The budget shown here reflects this approved fund shift.

\*\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

2. Total net demand reduction and energy savings:

	<b>Net kW*</b>	<b>Net kWh</b>
<b>Projected</b>	404	4,117,383
<b>Actual</b>	720	3,943,430
<b>Committed</b>	125	785,808
<b>Total Recorded</b>	845	4,729,238

\* Per Decision 03-04-055, Table 2b.

3. Total number of customers served:

Projected: 375 projects

Actual: 189 projects

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4. Projected and actual number of units:  
Please refer to program activity tables in corresponding program workbook.
5. Total rebate (\$) paid:  
Paid = \$1,448,734; Committed = \$279,111

**III. Program Implementation Status**

1. Status of program delivery  
The 2003 program was implemented April 17, 2003. During the third quarter, the program reached near full subscription. As a result, SCE sought permission to increase the program's incentive budget to extend the program offering through the end of 2003. The request is pending before the CPUC.
2. Customer Enrollment  
Two blank copies of the program application forms were sent to the Commission's Energy Division.
3. Workbook  
Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.
4. Training  
No statewide training was offered during the third quarter of 2003.
5. Marketing

<b>Marketing Piece</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b>No. Per Method</b>
Multifamily Energy Efficiency Rebate Program Application Package	1	Distributed through: Energy Efficiency Call Center Representatives and voice response unit SCE Energy Efficiency Website	Toll free calls: 10  Web site: 100 (est.)
Torchiere Exchange Events	3	Two one-day events conducted exchanging halogen torchieres for fluorescent torchieres for apartment residents	2,146
CFL Postcard Mailer	1	Direct mail postcard promoting CFLs	24,000

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**4th Quarter Report: October 1, 2003 through December 31, 2003**

		specifically and the Program in general	
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The SCE website identified below provides a description of the program; lists measures with general specifications and rebate levels; downloadable application forms; and SCE’s toll-free Energy Efficiency telephone number. [www.sce.com](http://www.sce.com).

6. Hard to Reach

The HTR target for 2003 is to have 36 percent of the project applications come from HTR customers. During the fourth quarter, 57 percent of the submitted rebate applications came from HTR customers.

**IV. Program Accomplishments**

Statewide Activities:

- The Statewide Multifamily team hosted a meeting for all participating multifamily contractors throughout the state. The meeting was held in San Francisco at the PG&E’s Pacific Energy Center with approximately 20 representatives from contracting companies and other industry actors or via conference call. The meeting’s objective was to gather first-hand feedback from this important group of Multifamily Program participants, about how well the program serves its targeted customer (the property owner and managers), feedback on 2003 program improvements, to receive suggestions for program improvements, and to heighten contractor awareness about the critical role they play with the customer as they participate through the program. Attendees provided very favorable feedback about the current program design. Additionally, there was open communication among attendees about “best practice” customer service efforts each has implemented. As a result of the meeting, the IOU’s have a better understanding how contractors work with our customers and the contractors have a better understanding of the IOU’s customer service expectations, while they perform work throughout the Multifamily Program.
- IOUs developed and coordinated the submittal of a statewide Multifamily Rebate program full-page advertisement in the Multifamily Trends magazine that was distributed at the Urban Land Institute’s Fall Conference. These statewide advertising efforts continue to strengthen the program’s prominence among industry actors and participants.
- The Statewide Multifamily team conducts weekly conference calls to coordinate Statewide Multifamily efforts and assure program continuity.

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SCE-specific activities:

- On December 3, 2003, an ALJ Ruling was issued approving SCE's request to shift \$0.100 million from unspent 2002 funds to SCE's 2003 Multifamily Energy Efficiency Rebate program. The entire amount was paid or committed before the end of the 4<sup>th</sup> Quarter.
- Just in time for the change back to Standard Time, in early October 2003 SCE developed and mailed over 24,000 postcards to its multifamily service accounts promoting CFL rebates resulting in reservation volumes of over 3,000 CFLs from first-time program participants and heightening program awareness throughout the service territory.
- Through SCE's marketing efforts toward hard-to-reach customers as well as our market presence and influence, SCE reports a hard-to-reach penetration rate of 57 percent of all submitted applications, or, approaching twice the annual goal, for the second consecutive year.
- SCE conducted three torchiere exchange events during the 4<sup>th</sup> Quarter. These events specifically target apartment renters through joint marketing outreach efforts between SCE, property managers and owners, and the local retail anchor where the events are conducted. Over the three events, 2,146 energy saving fluorescent torchieres were exchanged for high-consumption and hazardous halogen torchieres.
- During the 4<sup>th</sup> Quarter, SCE program management continued to communicate 2003 program information, parameters, and reservation policy to key customers and contractors with known interests in the program via telephone, email, and in-person presentations.

**V. Program Challenges**

None

**VI. Customer Disputes**

None

**VII. Compliance Items**

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

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**Decision 03-01-038, Ordering Paragraph 3, states:**

*“To prevent service disruption, we authorize the IOUs whose programs will expire at the end of 2002 to continue those programs through March 31, 2003, using Public Goods Charge collections from that period, in the amounts set forth in the body of this decision. If the Commission issues a decision on 2003 program applications prior to that time, this “bridge funding” shall expire upon issuance of that decision. If the IOUs incur expenses in 2003 before the Commission issues this decision, they should track those expenses and account for such expenses in their reports to the Commission on first quarter 2003 program results. The IOUs can request recovery of these expenditures through their respective PGC energy efficiency balancing accounts.”*

**Response:**

The IOUs continued the 2002 programs through March 31, 2003. Expenses prior to the issuance of the decision and bridge funding expenditures through March 31, 2003 are reported in each program’s text and Workbook.

**Decision 03-01-038, Ordering Paragraph 4, states:**

*“The IOUs shall include the program accomplishments achieved during the bridge funding period toward the cumulative goals of their 2003 programs.”*

**Response:**

All accomplishments during the bridge funding period will be included toward the cumulative goals of the 2003 programs.

**Decision 03-03-028, Ordering Paragraph 1, states:**

*“To prevent program disruption, we authorize the utilities whose programs expire at the end of 2002 to continue those programs beyond March 31, 2003, using Public Goods Charge collections from associated periods, in the amounts set forth in the body of this decision.”*

**Response:**

The IOUs continued the 2002 programs beyond March 31, 2003.

**Decision 03-03-028, Ordering Paragraph 2, states:**

*“The utilities are hereby authorized additional bridge funding at a level of 7% a month against the total 2003 utility funding amounts set forth in Decision (D.) 03-01-038 so that the bridge funding, plus funding for new 2003 programs, equal the total amounts described in D. 03-01-038.”*

**Response:**

The IOUs continued the 2002 programs using the additional bridge funding at the level specified.



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**Decision 03-04-055, page 5, states -**

*“Accordingly, the IOUs shall limit reservations for a single program participant (including installing contractors and property management companies) to no more than 5% of the available statewide incentive budget. In addition, reservations of funding should expire within 45 days if installations are not complete and final claims for incentives submitted. Participants may be provided with an extension to the 45-day period, at the discretion of the IOU.”*

**Response -**

In response to Decision 03-04-055, SCE will apply the 5 percent cap to its program incentive budget. The cap will apply to the incentive budget shown in SCE’s approved program implementation plan and will not change during the year unless the incentive budget is modified.

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

**I. Program Overview**

The statewide Home Energy Efficiency Survey (HEES) Program provides residential customers with energy efficiency information to help them understand, control and reduce energy usage in their homes. The program targets hard-to-reach customers and offers mail-in and on-line surveys in English, Spanish and Chinese. Customers completing a mail-in or on-line survey receive a customized energy report that provides an analysis of their actual energy usage. The energy report also includes charts and graphs and information on energy efficiency products and services, rebate programs and other energy-related information to encourage the adoption of energy efficiency measures identified through the energy survey.

The Mail-In Surveys involve targeted direct mailings and provide customers with limited or no on-line access the flexibility to receive energy information. The On-Line Surveys are available on Southern California Edison's (SCE) website in an interactive or web-posted format. The English and Spanish interactive surveys provide customers with immediate results on-line, and the web-posted Chinese survey is downloadable from SCE's website. Customers complete the Mail-In and web-posted surveys and submit them for processing to receive their customized energy reports. Customers who complete the interactive surveys receive energy reports immediately on-line.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$1,295,654
Preliminary Program Expenditures (includes program commitments)*	\$1,254,477

\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

2. Total net demand reduction and energy savings:

Based upon the California Public Utilities Commission (Commission) approved Energy Efficiency Policy Manual, this information program is not expected to demonstrate energy savings or demand reductions.

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3. Total number of customers served:

	<b>Mail-In Survey</b>	<b>On-line Survey</b>	<b>Total Surveys</b>
Target	18,000	12,000	30,000
Actual*	26,515	16,513	43,028

\* Actual (including program commitments) = [actual + committed thru December 31, 2003]

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

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

**III. Program Implementation Status**

1. Status of program delivery

In compliance with Decision 03-04-055, statewide utilities worked jointly to launch the Home Energy Efficiency Survey Program following Commission approval on April 17, 2003.

2. Customer Enrollment

The following sample copies of surveys were sent to the Commission's Energy Division:

- Mail-In Survey - English and Spanish in all four Investor-Owned Utilities' (IOU) service territories
- Chinese in PG&E, SoCalGas, and SCE service territories, and
- Vietnamese in SDG&E's service territory.

3. Workbook

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

4. Training

Customer training is typically not conducted due to the nature of the program. The energy surveys are created in simplified form to help the customers complete an energy survey.

5. Marketing

			<b>Number with</b>
--	--	--	--------------------

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<b>Description</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b>Each Method</b>
On-line interactive survey completed in English	1,854	<a href="https://websafe.kemai nc.com/websitesce/">https://websafe.kemai nc.com/websitesce/</a>	1,854
On-line interactive survey completed in Spanish	161	<a href="https://websafe.kemai nc.com/websitescesp anish/">https://websafe.kemai nc.com/websitescesp anish/</a>	161

6. Hard-to-Reach

SCE's 2003 hard-to-reach (HTR) target is to send at least 50 percent of the mail-in surveys to HTR customers, as defined by the CPUC.

SCE exceeded its HTR goal in the 3<sup>rd</sup> quarter. Although no direct mail solicitation packages were mailed in the 4<sup>th</sup> quarter, SCE continued to maximize the opportunity to educate HTR customers through its outreach efforts with the community-based organizations (CBOs).

**IV. Program Accomplishments**  
**Statewide Fourth Quarter Accomplishments**

Statewide activities included:

- The IOUs conducted a conference call on October 9, 2003 to discuss the status of the programs and launching of the new on-line interactive HEES in Spanish.
- The IOUs worked with Univision to launch a statewide TV advertising campaign targeting Spanish-speaking customers. This statewide campaign was released from October 27th to November 2<sup>nd</sup>. It promoted the new On-Line interactive HEES in Spanish.
- The IOUs published a joint press release for the new On Line interactive HEES in Spanish to coincide with the Univision TV advertisements.

**Utility-Specific Fourth Quarter Accomplishments**

SCE-specific activities included:

- During the fourth quarter, SCE completed 7,089 mail-in surveys and 2,015 On-line surveys bringing year-to-date program achievement to 26,483 Mail-In Surveys and 15,647 On-Line Surveys. Combined, these numbers represent 136 percent of program goal.
- The Starbucks campaign was a tremendous success and was discontinued in September upon achieving program goal. The 4th quarter continued to reap benefits from the Starbucks marketing efforts, and 2,015 customers completed the On-Line Survey. Of these 2,015 completed surveys, 161 were completed in Spanish.
- SCE continued its efforts to achieve equity and remove market barriers by enhancing access of energy efficiency programs for non-English speaking

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customers. SCE developed and implemented a three-month pilot program that involved working side-by-side with local community-based organizations to promote the survey programs and other SCE rebate and incentive programs to the Spanish and Asian communities. The pilot program achieved 1,449 completed surveys in English, Chinese and Vietnamese.

- In addition to the Statewide Univision campaign, SCE promoted the on-line interactive HEES in Spanish by coordinating with local print, TV and radio stations to encourage Spanish-speaking customers to complete the survey.
- Printed and distributed new English/Spanish fliers to promote the On-Line Survey.

**V. Program Challenges**

None.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

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

**Decision 02-03-056, Ordering Paragraph 5 states:**

*“At least 50 percent of the mailed statewide residential Home Energy Efficiency Surveys shall be sent to hard-to-reach customers. The IOUs shall develop and make available a Spanish-language version of the survey, and a version in the most prevalent Asian language in the IOU’s area, for both mailing and web-posting within two months of the launch of their survey programs.”*

Response:

Spanish-language and Chinese-language versions of the mail-in HEES were prominently posted on PG&E’s Web site on June 1, 2002, within two months of the program launch.

**Decision 03-01-038, Ordering Paragraph 3, states:**

*“To prevent service disruption, we authorize the IOUs whose programs will expire at the end of 2002 to continue those programs through March 31, 2003, using Public Goods Charge collections from that period, in the amounts set forth in the body of this decision. If the Commission issues a decision on 2003 program applications prior to that time, this ‘bridge funding’ shall expire upon issuance of that decision. If the IOUs incur expenses in 2003 before the Commission issues this decision, they should track those expenses and account for such expenses in their reports to the Commission on first quarter 2003 program results. The IOUs can request recovery of these expenditures through their respective PGC energy*

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*efficiency balancing accounts.”*

Response:

The IOUs continued the 2002 programs through March 31, 2003. Expenses prior to the issuance of the decision and bridge funding expenditures through March 31, 2003 are reported in each program’s text and Workbook.

**Decision 03-01-038, Ordering Paragraph 4, states:**

*“The IOUs shall include the program accomplishments achieved during the bridge funding period toward the cumulative goals of their 2003 programs.”*

Response:

All accomplishments during the bridge funding period will be included toward the cumulative goals of the 2003 programs.

**Decision 03-03-028, Ordering Paragraph 1, states:**

*“To prevent program disruption, we authorize the utilities whose programs expire at the end of 2002 to continue those programs beyond March 31, 2003, using Public Goods Charge collections from associated periods, in the amounts set forth in the body of this decision.”*

Response:

The IOUs continued the 2002 programs beyond March 31, 2003.

**Decision 03-03-028, Ordering Paragraph 2, states:**

*“The utilities are hereby authorized additional bridge funding at a level of 7% a month against the total 2003 utility funding amounts set forth in Decision (D.) 03-01-038 so that the bridge funding, plus funding for new 2003 programs, equal the total amounts described in D. 03-01-038.”*

Response:

The IOUs continued the 2002 programs using the additional bridge funding at the level specified.

**D. 03-04-055, Ordering Paragraph 3 states:**

*“No party shall delay program commencement or preparation pending submission of or Commission action on these plans.”*

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Response:

PG&E's 2003 program commencement and preparation were not delayed pending submission of or Commission action on these plans.

**D. 03-04-055, Ordering Paragraph 6 states:**

*“The utilities shall work together to market their statewide programs. To the extent the utilities offer the same programs, they shall advertise them together. Program Implementation Plans and quarterly reports shall describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.”*

Response:

PG&E will work together with other utilities to market its statewide programs. To the extent PG&E offers the same programs, PG&E will advertise them together with the other utilities. PG&E's Program Implementation Plans and quarterly reports describe utility efforts to coordinate programs. PG&E will focus all PGC-funded marketing for programs in this decision on energy efficiency messages.

**D. 03-04-055, Ordering Paragraph 7 states:**

*“Providers of information and training programs shall not be entitled to retain their final quarterly payments unless the Commission or the assigned Commissioner accepts their final quarterly reports. “Acceptance” requires that the Commission, assigned Commissioner or ALJ indicate satisfaction that the provider has acted reasonably in attempting to meet program goals. This requirement is in addition to any other requirement of this decision. With their final quarterly reports, program providers shall submit sufficient documentation for the Commission to determine whether the program has met its goals. Program providers, including third parties, shall prominently post all quarterly reports on their respective websites.”*

Response:

With its final quarterly report, PG&E will submit sufficient documentation for the Commission to determine whether the program has met its goals. PG&E has prominently posted all quarterly reports on its Web site.

**D. 03-04-055, Ordering Paragraph 14 states:**

*“Where program changes are required by this order, the utilities shall submit revised sections of their previously filed program implementation plans incorporating those changes. Those revisions shall be submitted to Energy Division staff within 45 days of this order.”*



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Response:

PG&E submitted revised sections of its previously filed program implementation plans incorporating program changes required by D. 03-04-055 in revised Implementation Plans filed in June 2003. Revised Program Implementation Plans were submitted to Energy Division staff within the prescribed deadline of 45 days from April 17, 2003.

**D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 4,  
Residential Retrofit Home Energy Efficiency Survey Program states:**

*4. Residential Retrofit Home Energy Efficiency Survey Program.*

*“We require each [utility] to provide mailed and On Line surveys in Spanish. The IOUs should continue to send 50% of mail-in surveys to hard to reach customers.”*

Response:

In compliance with D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 4, PG&E provided mail-in and On Line surveys in Spanish and continues to send 50 percent of mail-in surveys to hard-to-reach customers.

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

- California ENERGY STAR® New Homes – Multifamily
- California ENERGY STAR® New Homes – Single Family

**I. Program Overview**

The California ENERGY STAR® New Homes Programs continued to build on one of the most successful efforts undertaken over the past decade by Pacific Gas and Electric Company (PG&E), Southern California Edison (SCE), San Diego Gas & Electric (SDG&E) and Southern California Gas (SoCalGas) to influence the design and construction of energy-efficient single family and multifamily dwellings. The most successful elements of the various utility programs have been combined with input from the California Energy Commission, the U.S. Environmental Protection Agency (EPA), and California home builders to create two statewide programs with identical applications, incentives, and requirements for both the single family and multifamily sectors, with a targeted effort in hard-to-reach (HTR) residential new construction markets.

The California ENERGY STAR® New Homes Programs are designed to encourage single family and multifamily (including rental apartments, condominiums, and town homes) builders to construct units that reduce energy usage through a combination of financial incentives, design assistance and education. Due to the long-term nature of new construction, these incentives will be available to participants that meet program requirements and can be verified by December 2005. The program is performance-based and no specific measures or equipment are required for participation or qualification.

The program offers a multifamily high-rise component for projects that use the 2001 Energy Efficiency Standards for High-Rise Residential Buildings. The EPA's ENERGY STAR® currently does not have a designation for multifamily buildings above three stories. The information gathered as a result of this component will be shared with EPA ENERGY STAR®. EPA is interested in the outcome of this program activity for possible future ENERGY STAR® designation of multifamily buildings that are four or more stories.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Single Family</b>	<b>Multifamily</b>	<b>Total</b>
Authorized Budget*	\$4,250,000	\$750,000	\$5,000,000
Preliminary Program Expenditures (includes program commitments)**	\$5,059,900	\$772,478	\$5,832,378

\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

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\*\*SCE targeted a 10 to 15 percent total budget over-commitment to account for the historical drop out of committed units. SCE achieved a 14 percent budget over-commitment by year-end

2. Total net demand reduction and energy savings

<b>Single Family</b>	<b>Net Peak kW</b>	<b>Net kWh</b>
<b>Projected</b>	4,679	4,338,352
<b>Actual</b>	138	129,082
<b>Committed</b>	6,877	6,400,079
<b>Total Recorded</b>	7,015	6,529,161

<b>Multifamily</b>	<b>Net Peak kW</b>	<b>Net kWh</b>
<b>Projected</b>	561	497,600
<b>Actual</b>	15	11,126
<b>Committed</b>	658	582,371
<b>Total Recorded</b>	674	593,498

3. Total number of customers served

- Projected: Single Family—4,380 units; Multifamily—2,000 units
- Actual:
  - **Single Family** received and approved applications for 5,905 units (135% of unit goal) for total estimated incentives of \$4,033,900
  - **Multifamily** received and approved applications for 2365 units (118% of unit goal) for total estimated incentives of \$503,960.

4. Projected and actual number of units

Please refer to activity tables in corresponding program workbook.

5. Total incentives paid (single family) = \$97,200

Total incentives committed (single family) = \$3,936,700.

Total incentives paid (multifamily) = \$14,700

Total incentives committed (multifamily) = \$489,260

**III. Program Implementations Status**

1. Status of program delivery

In compliance with D. 03-04-055, the 2003 programs began in April 2003.

2. Customer Enrollment

Sample copies of program applications were sent to the California Public Utilities Commission's Energy Division.

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3. Workbook  
Please refer to workbook for details of program expenditures and program activities.
4. Training  
No training was offered in the fourth quarter.
5. Marketing

List Pieces	Total Quantity	Method of Delivery	# w/Each Method
Single Family applications		– In person or U.S. Mail	25
Multifamily applications		– In person or U.S. Mail	20
Multifamily applications - consultant		BIASC event	20
Multifamily applications - consultant		-U. S. Mail	0

- www.sce.com. Program information and sample applications in pdf. format were available starting in the second quarter and continuing through the end of the year on the Web site under the “Rebates and Offers” and “New Construction for Builder/Developers” section.
- During the fourth quarter SCE continued its “Twinkle, Twinkle Energy Star” outreach campaign to consumers. Advertising in the LA Newspaper Group (which includes eight newspapers within the LA metro area) promoting Energy Star subdivisions with models open or “open soon” began in August and continued through the end of the year. Additionally, SCE also continued the campaign within the Homebuyers Guide magazine, which is the premier free “home finder” publication in the region.
- On October 6<sup>th</sup>, SCE attended the BIA Southern California monthly members’ meeting to promote the CESNHP.

6. Hard-to-Reach  
All hard-to-reach accomplishments will apply toward 2003 targets. Single Family – of the 5,905 units received, 45 percent were hard-to-reach. Multifamily – of the 2,365, units received 43 percent were hard-to-reach. The table below shows the hard-to-reach direct implementation budget allocation.

	Goal \$	Goal % DI	Actual \$	Actual %
Single Family	\$490,000	20%	\$1,733,600	43%

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Multifamily	\$100,000	20%	\$332,040	66%
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**IV. Program Accomplishments**

The IOUs submitted an Energy Star Awards application to the Environmental Protection agency highlighting the 2003 statewide California Energy Star New Homes program accomplishments. The IOUs were notified that they will receive an Energy Star Award for "Regional, State and Community Leadership in Energy Efficiency," as well as retaining the "Partner of the Year" designation. The 2004 Energy Star Awards Ceremony will be held on March 2, 2004 in Washington, D.C.

**SCE Accomplishments:**

SCE worked with graphic designers to create a variety of point-of-sale (POS) collateral marketing materials that promote the Energy Star label within the new communities. Small quantities of these items were initially ordered so SCE could obtain feedback from the builders as to which POS materials they preferred most to use on site and inside the model homes. The items currently include, yard signs, flags, vinyl cling window decals, and small table tents.

SCE promoted the CESNHP as an exhibitor at the 2003 Building Industry Show (BIS) at the Anaheim Convention Center on October 16<sup>th</sup> & 17<sup>th</sup>. Over 8,000 attendees converged on the exhibition center where nearly 400 exhibitors promoted their products and services.

**V. Program Challenges**

None

**VI. Customer Disputes**

None

**VII. Compliance Items**

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

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

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

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Response:

Twenty percent of direct implementation funds were reserved for units to be constructed for hard-to-reach customers.

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

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

Response:

Separate programs for Single Family and Multifamily homes were developed and implemented as of April 2002. PG&E has developed inspection procedures that will ensure that at least 15 percent of all claimed installations of energy efficiency measures are verified with an inspection by a CHEERS or HERS-certified inspector. To date, no projects have reached inspection stage.

**Decision 03-01-038, Ordering Paragraph 3, states:**

*“To prevent service disruption, we authorize the IOUs whose programs will expire at the end of 2002 to continue those programs through March 31, 2003, using Public Goods Charge collections from that period, in the amounts set forth in the body of this decision. If the Commission issues a decision on 2003 program applications prior to that time, this ‘bridge funding’ shall expire upon issuance of that decision. If the IOUs incur expenses in 2003 before the Commission issues this decision, they should track those expenses and account for such expenses in their reports to the Commission on first quarter 2003 program results. The IOUs can request recovery of these expenditures through their respective PGC energy efficiency balancing accounts.”*

Response:

The IOUs continued the 2002 programs through March 31, 2003. Expenses prior to the issuance of the decision and bridge funding expenditures through March 31, 2003 are reported in each program’s text and Workbook.

**Decision 03-01-038, Ordering Paragraph 4, states:**

*“The IOUs shall include the program accomplishments achieved during the bridge funding period toward the cumulative goals of their 2003 programs.”*

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Response:

All accomplishments during the bridge funding period will be included toward the cumulative goals of the 2003 programs.

**Decision 03-04-055, by Ordering Paragraph 14, Attachment 2, pages 9-10, states:**

*“In order to encourage wider-scale participation at the 15% level and retain the reward for yet higher energy savings at the 20% level, we eliminate the 20% participation level in the coastal climates (due to the lower energy savings potential) and reduce the 20% incentive in the non-coastal climate to \$700. This modification will retain a 20% performance level while allowing program funds to stretch further than was possible in 2002. It will also allow the Commission to evaluate whether or not the higher incentive is driving the builder to a 20% performance standard. The utilities should recalculate program energy savings and demand reduction targets to conform to this program modification, and file revised program implementation plans including such recalculations as directed in this decision.”*

Response:

In response to Decision 03-04-055, SCE will apply the 20 percent non-coastal tier only to the Single Family program. Only the 15 percent tier will be offered for the Multifamily program. PG&E will submit a revised program implementation plan that reflects the revised energy and demand savings targets that reflect the Commission’s direction.

**D. 03-04-055, Ordering Paragraph 3 states:**

*“No party shall delay program commencement or preparation pending submission of or Commission action on these plans.”*

Response:

SCE’s 2003 program commencement and preparation were not delayed pending submission of or Commission action on these plans.

**D. 03-04-055, Ordering Paragraph 6 states:**

*“The utilities shall work together to market their statewide programs. To the extent the utilities offer the same programs, they shall advertise them together. Program Implementation Plans and quarterly reports shall describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.”*

Response:

SCE will work together with other utilities to market its statewide programs. To the extent PG&E offers the same programs, SCE will advertise them together with the other utilities. SCE’s Program Implementation Plans and quarterly



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reports describe utility efforts to coordinate programs. SCE will focus all PGC-funded marketing for programs in this decision on energy efficiency messages.

***D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 5, California ENERGY STAR® New Homes Program states:***

***“5. California Energy Star® New Homes Program, Approved Program Modifications”***

*“The utilities propose to add a multi-family builder design assistance option and to provide verification assistance to builders through the CHEERS program. This appears a reasonable way to increase participation by multi-family builders and we approve this program design change.”*

*“In order to encourage wider-scale participation at the 15% level and retain the reward for yet higher energy savings at the 20% level, we eliminate the 20% participation level in the coastal climates (due to the lower energy savings potential) and reduce the 20% incentive in the non-coastal climate to \$700.”*

*“The utilities should recalculate program energy savings and demand reduction targets to conform to this program modification, and file revised program implementation plans including such recalculations as directed in this decision.”*

Response:

In compliance with D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 5, SCE has added a multifamily builder design assistance option and provides verification assistance to builders through the CHEERS program in 2003. In compliance with D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 5, SCE has eliminated the 20 percent participation level in the coastal climates (due to the lower energy savings potential) and reduced the 20 percent incentive in the non-coastal climate to \$700 for 2003. SCE has also recalculated program energy savings and demand reduction targets to conform to this program modification, and filed revised program implementation plans including such recalculations as directed in this decision.

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

**I. Program Overview**

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

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

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget*	\$13,750,000
Preliminary Program Expenditures (includes program commitments)**	\$14,581,138

\*\$50,000 was shifted from the Building Operating Certification (BOC) program.

\*\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

2. Total net demand reduction and energy savings

	<b>Net Peak kW</b>	<b>Net kWh</b>
<b>Target</b>	14,724	71,656,875
<b>Actual</b>	1,685	12,149,483
<b>Committed</b>	10,823	90,117,726
<b>Total Actual and Committed (Recorded)</b>	12,508	102,267,209

3. Total number of customers served

Projected: No projections in the Implementation Plan

Actual: 454 applications received to date

72 applications received in the fourth quarter.

4. Projected and actual number of units:

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

5. Total incentives (\$) paid = \$ 1,884,697

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Total incentives (\$) committed = \$ 9,817,167

**III. Program Implementations Status**

1. Status of program delivery:

The PY03 Statewide SPC program was kicked off after CPUC funding approval on April 17, 2003.

In accordance with Decision 03-04-055, Ordering Paragraph (OP) 8, which authorizes fund shifting within a program category up to 10%, SCE shifted \$50,000 of available funding from its nonresidential Building Operating Certification (BOC) program to the nonresidential Standard Performance Contract program to meet additional customer demand for the program.

2. Customer Enrollment

Copies of these applications were sent to the California Public Utilities Commission Energy Division.

3. Workbook

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

4. Training

This program did not sponsor any external training during this quarter.

5. Marketing:

At SCE during the fourth quarter, the 2003 SPC program brochure was distributed to customers, SCE account executives, and at special events. Numerous meetings were also held with customers and third parties to promote the SPC program. SCE major account executives visited customer sites and encouraged participation in the program. Program guidelines, applications, current funding status, program updates, and other information are available at [www.sce.com/spc](http://www.sce.com/spc).

6. Hard to Reach

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

**IV. Program Accomplishments**

At SCE, 72 project applications were received in the fourth quarter and 33 applications were approved for funding.

**V. Program Challenges**

None

**VI. Customer Disputes**

None

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**VII. Compliance Items**

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

**D. 03-04-055, Ordering Paragraph 3 states:**

*“No party shall delay program commencement or preparation pending submission of or Commission action on these plans”.*

Response:

The PY03 Statewide SPC program was kicked off after CPUC funding approval on April 17, 2003.

**D. 03-04-055, Ordering Paragraph 6 states:**

*“The utilities shall work together to market their statewide programs. To the extent the utilities offer the same programs, they shall advertise them together. Program Implementation Plans and quarterly reports shall describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.”*

Response:

SCE will work together with other utilities to market their statewide programs. To the extent SCE offers the same programs, SCE will advertise them together with the other utilities. SCE’s Program Implementation Plans and quarterly reports describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.

**D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 6, Standard Performance Contract (SPC) Program states:**

*“ Standard Performance Contract (SPC) Program*

*In their 2003 SPC program submissions, the IOUs propose to modify the 80-20 rule to include all fluorescent lamps except for the installation of “leading edge” T-5 and PL lamps. The IOUs point out that they will nevertheless offer no more than 30% of incentives for lighting projects, consistent with current rules.*

*We authorize the proposed modification but expect the utilities to aggressively market non-lighting measures.”*

Response:

In compliance with D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 6, SCE’s 2003 SPC program submission includes the

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modification to the 80-20 rule to include all fluorescent lamps except for the installation of "leading edge" T-5 and PL lamps and offers no more than 30 percent of incentives for lighting projects, consistent with current rules. SCE is aggressively marketing non-lighting measures.

*“The utilities propose to increase gas incentives from \$.45/therm to \$.60/therm to increase program participation. We grant this request, consistent with our overall goal to increase participation in cost-effective energy efficiency programs.”*

Response:

SCE does not offer incentives for therm savings.

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Program Title : **Express Efficiency**

**I. Program Overview**

This statewide program offers nonresidential prescriptive rebates for specific, proven energy efficient measures including lighting; heating, ventilation and air conditioning (HVAC), refrigeration, agricultural, gas, food service, and motor retrofit measures. The program is limited to small and medium customers with an emphasis on the hard-to-reach (HTR) sector.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$7,000,000
Program Expenditures (includes program commitments)*	\$7,429,970

\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

2. Total net demand reduction and energy savings:

	<b>Net kW*</b>	<b>Net kWh</b>
<b>Projected</b>	15,000	71,869,000
<b>Actual</b>	20,244	91,045,434
<b>Committed</b>	8,110	35,558,655
<b>Total Recorded</b>	28,354	126,604,089

\* Per Decision 03-04-055, Table 2b.

3. Total number of customers served:

Projected: 5,000 applications paid  
Actual: 6,458 applications paid; 584 commitments

4. Projected and actual number of units

Please refer to program activity tables in corresponding program workbook.

5. Total rebate (\$) paid:

Paid = \$3,416,390      Committed = \$2,124,081

**III. Program Implementation Status**

1. Status of program delivery

- Beginning September 22, 2003, and for the remainder of program year 2003, the CPUC's Energy Division authorized the IOUs to increase



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Express Efficiency incentive rebate levels by up to 60 percent for measures that the joint utilities deemed appropriate.

- SCE notified vendors and internal SCE stakeholders via e-mail of the changes in rebate amounts, listing the selected measures that changed and their revised amounts. The e-mail also provided a status of funds.
- SCE revised the Express Efficiency program flyer to reflect higher rebate levels in the fourth quarter for distribution by SCE’s customer representatives.
- SCE developed, printed and mailed three direct mail pieces in the fourth quarter. These mailers highlighted the benefits of installing high efficiency HVAC, Lighting, and Refrigeration equipment, and listed examples of measures and increased rebate amounts. The direct mail campaign was targeted toward GS-1 and GS-2 customers by SIC code and climate zone for each technology.

2. Customer Enrollment

Two blank copies of the revised 2003 program application forms were included with the third quarter report. These forms reflect changes in rebate amounts consistent with Energy Division authorization and were used exclusively during the fourth quarter.

3. Workbook

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

4. Training

No training conducted in the fourth quarter.

5. Marketing

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b>Quantity-Each Method (approx)</b>
Express Efficiency Flyer	25,000	Account Executive	25,000
SESM HVAC Mailer	163,101	Direct Mail	163,101
SESM Lighting Mailer	288,000	Direct Mail	288,000
SESM Refrigeration Mailer	232,222	Direct Mail	223,222

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6. Hard to Reach  
SCE had a HTR goal of 47 percent of customers served. Through the fourth quarter the program achieved a HTR rate of 63 percent.

**IV. Program Accomplishments**

Fourth Quarter Accomplishments

- Regular IOU meetings and conference calls continued to occur in order to ensure statewide consistency in all externally visible aspects of the Express program.
- The IOU Team submitted a joint utility proposal to the Energy Division to increase incentive levels for selected energy efficient measures to focus on the needs of the smaller and medium sized customer. The Energy Division allowed the joint utilities to increase incentive rebate levels by up to 60 percent for Express measures that utility program managers deemed appropriate. The IOU Team agreed on measures and advertised the new rebate levels effective September 22, 2003. The higher rebate levels remained in effect throughout the fourth quarter.
- In December 2003, the Express Efficiency program received recognition from the American Council for an Energy-Efficient Economy (ACEEE) as an “exemplary program”. This is part of ACEEE’s national awards program to honor America’s best energy efficiency programs. Programs selected for this honor were deemed to be especially noteworthy for their effectiveness and innovation in helping customers achieve greater levels of energy efficiency
- PG&E, SDG&E, and SCE promoted the statewide Express Efficiency program by sponsoring a quarterly ad with the California Air Conditioning Contractors of America (Cal-ACCA) organization.
- SCE’s Express Efficiency and Nonresidential Audit programs continued to closely coordinate activities to increase customer participation.
- SCE printed revised rebate forms with increased rebate levels and posted new PDF’s to the web site.
- In a pilot program element, SCE enrolled 2,600 HTR customers in the Express Efficiency program at a series of community and association energy expos in 2003. As part of enrollment, and to introduce HTR customers to energy efficiency, each HTR customer received one to six free compact florescent lamps (CFLs) depending on individual need. This outreach method proved to be highly effective in stimulating HTR

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customer involvement in the Express Efficiency program, and allowed them to begin saving energy and money immediately.

In follow up inspections of about 900 HTR customers who received free CFLs it was discovered that approximately 60 percent of customers had not yet installed the CFLs. Because it was not considered to be cost effective to follow up with all 2,600 customers in the pilot program, SCE elected to discount the full amount of 3,178,471 kWh and 672 kW derived from the outreach effort from the total Express Efficiency program claimed savings. SCE allocated marketing funds of \$48,651 to pay for the HTR pilot program element. If this type of HTR outreach is used in the future, SCE will coordinate with vendors to ensure that in every case the CFLs are installed.

**V. Program Challenges**

None.

**VI. Customer Disputes**

None

**VII. Compliance Items**

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

**Decision 02-03-056, Ordering Paragraph 12 states:**

*“The IOUs shall make available a rebate reservation system in connection with their Express Efficiency programs.”*

Response:

The IOUs have established a statewide reservation system.

**Decision 02-03-056 page 25, also states:**

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

Response:

To comply, the IOUs have provided materials and side-by-side Express Efficiency and SPC program comparisons at all customer presentations and in

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handout packets. On an individual basis, customers have also been guided to the appropriate program based upon their types of projects.

**Decision 03-01-038, Ordering Paragraph 4, states:**

*“The IOUs shall include the program accomplishments achieved during the bridge funding period toward the cumulative goals of their 2003 programs.”*

Response:

All accomplishments during the bridge funding period will be included toward the cumulative goals of the 2003 programs.

**D. 03-04-055, Ordering Paragraph 3 states:**

*“No party shall delay program commencement or preparation pending submission of or Commission action on these plans.”*

Response:

Program commencement and preparation were not delayed pending submission of or Commission action on these plans.

**D. 03-04-055, Ordering Paragraph 6 states:**

*“The utilities shall work together to market their statewide programs. To the extent the utilities offer the same programs, they shall advertise them together. Program Implementation Plans and quarterly reports shall describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.”*

Response:

SCE will work together with other utilities to market their statewide programs. To the extent SCE offers the same programs SCE will advertise them together with the other utilities. SCE’s Program Implementation Plans and quarterly reports describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.

**D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 7, Express Efficiency Program states:**

“Express Efficiency Program

*In 2003 the utilities propose to replace the "Account Aggregation Rule" with a program eligibility limit of 500 kW per service account and limiting incentives to any single corporation or chain account customer to \$25,000. We adopt the utility proposal to permit incentives of up to \$25,000 per corporation or chain account customer for work done on service accounts with loads not exceeding 500 kW. This proposal would apply to all utilities.”*

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Response:

In compliance with D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 7, SCE’s 2003 program replaces the “Account Aggregation Rule” by offering incentives of up to \$25,000 per corporation or chain account customer for work done on service accounts with loads not exceeding 500 kW.

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Program Title: **Statewide Nonresidential Energy Audit Program**

**I. Program Overview**

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

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$2,200,000
Preliminary Program Expenditures (includes program commitments)*	\$1,905,000

\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

2. Total net demand reduction and energy savings:

Based upon the California Public Utilities Commission approved Energy Efficiency Policy Manual, this information program is not expected to demonstrate energy savings or demand reductions.

3. Total number of customers served:

	<b>Audits</b>
<b>Target</b>	7,100*
<b>Actual</b>	8,533

\*Per Decision 03-04-055, Attachment 2, pp.15-6.

4. Projected and actual number of units:

Please refer to program activity tables in corresponding program workbook.

5. Total rebate (\$) paid:

Not applicable to this information program.

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**III. Program Implementation Status**

1. Status of program delivery

The 2003 Nonresidential Audit program commenced on April 17, 2003, and concluded operations on December 31, 2003.

2. Customer Enrollment

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

3. Workbook

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

4. Training

SCE sponsored the "How to manage your business energy costs" (Sub-titled: How to do an energy audit") training class for business customers on December 10, 2003. The class was offered as part of SCE's Education and Training program.

5. Marketing

In the 4th quarter, the IOUs continued to offer audit services to all nonresidential customers. In addition, the IOUs promoted the on-line and mail-in audit, as well as phone, CD-ROM and on-site audit services via e-mails and US mail of energy audit kits and bill inserts to encourage customers to participate in these types of audits.

6. Hard to Reach

During 2003, conduct 2,840 energy audits for hard-to-reach customers. Through the Fourth quarter of 2003, 4,952 hard-to-reach customer audits were completed.

**IV. Program Accomplishments**

SCE's program highlights this quarter included the following activities:

- Added a Spanish language on-line audit at the following Web page:  
<http://www.energyguide.com/energysmartsbe/SBEMasterFrame.asp?bid=sces>  
[p](#).
- Issued a December 4<sup>th</sup> press release featuring SCE's new Spanish language on-line energy audit.



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- On October 10, 2003, SCE executed a 19,710 piece direct mail drop comprised of the mail-in audit form self-mailer. The message encouraged target customers to take SCE's mail-in self-audit;
- On December 10, 2003, SCE issued a 30,000 message e-mail blast to again promote the special offer: "Take the SCE business energy survey and we'll treat (...you to coffee)." For fulfillment, SCE mailed a complimentary card good for a cup of coffee at Starbucks® to all qualifying SCE business customers who completed the on-line energy audit.
- Hard-to-reach customers continued to be assisted by the utility representatives who made visits to the customer's place of business and performed energy audits and additional informative support.

**V. Program Challenges**

None

**VI. Customer Disputes**

None

**VII. Compliance Items**

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

**Decision 03-04-055, Ordering Paragraph 3 states:**

*"No party shall delay program commencement or preparation pending submission of or Commission action on these plans."*

Response:

Program commencement and preparation were not delayed pending submission of or Commission action on these plans.

**Decision 03-04-055, Ordering Paragraph 6 states:**

*The utilities shall work together to market their statewide programs. To the extent the utilities offer the same programs, they shall advertise them together. Program Implementation Plans and quarterly reports shall describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.*

Response:

SCE will work together with other utilities to market their statewide programs. To the extent SCE offers the same programs SCE will advertise them together with the other utilities. SCE's Program Implementation Plans and quarterly

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reports describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.

**D. 03-04-055, Ordering Paragraph 14 states:**

*“Where program changes are required by this order, the utilities shall submit revised sections of their previously filed program implementation plans incorporating those changes. Those revisions shall be submitted to Energy Division staff within 45 days of this order.”*

Response:

SCE submitted revised sections of their previously filed program implementation plans incorporating those program changes required by this order.

**D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 8  
Nonresidential Energy Audit Program states:**

*“ Nonresidential Energy Audit Program*

*[W]e will require that in exchange for approving the number of audits as proposed, the IOUs shall include in their revised program implementation plans and quarterly reports the numbers of the types of audits that are planned and conducted”.*

Response:

In compliance with D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 8, SCE’s 2003 revised program implementation plan include the numbers of the types of audits that are planned and conducted.

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Program Title: **Statewide Nonresidential Building Operator Certification Program**

**I. Overview**

This is a statewide training and certification program for operators of medium and large commercial buildings (including governmental and institutional buildings and complexes) that seeks to establish and support a professional credential for building operators in California. Certified operators will have the training and background to identify and implement energy savings opportunities as an integral part of their operations and maintenance activities. The BOC Level I training course consists of eight days of training classes offered once per month over a seven-month period, and the BOC Level II training course consists of 7 days of training classes offered once per month over a five-month period.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$450,000
Preliminary Program Expenditures (includes program commitments)*	\$184,279

\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

2. Total net demand reduction and energy savings

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

3. Total number of customers served

Projected: 100 students

Actual: 134 students registered

4. Projected and actual number of units

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

5. Total rebates (\$) paid

Not applicable to this information program.

**III. Program Implementations Status**

1. Status of program delivery

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The PY03 Statewide BOC program was kicked off after CPUC funding approval on April 17, 2003. The 2003 BOC training courses began in July 2003 [except at PG&E, where two course series began in late June 2003].

2. Customer Enrollment

Not applicable to this information program.

3. Workbook

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

4. Training

The 2003 BOC training courses at SCE began in July 2003. SCE offered one new Level I course series during the fourth quarter.

5. Marketing

Both SCE and Northwest Energy Efficiency Council (NEEC) promote the BOC program. SCE Account Executives deliver the BOC program brochure and registration forms to commercial customers. NEEC direct mails the program brochure and registration forms to commercial customers in SCE service territory. The brochure is also distributed by SCE at events and tradeshows.

List Pieces	Quantity	Method of Delivery	# w/Each Method
None in 4 <sup>th</sup> Quarter	---	---	---

6. Hard to Reach

This program targets building operators of medium and large commercial facilities and is not designed for the small hard-to-reach business customers. Interested hard-to-reach nonresidential customers may participate in the training program if they have a building operator for their facility.

**IV. Program Accomplishments**

The 2003 statewide BOC training courses began in July 2003 [except at PG&E, where two course series began in late June 2003]. During the fourth quarter, two Level I BOC course series began statewide. At SCE, one Level I BOC course series began in October 2003.

During the fourth quarter, a total of 30 BOC classes were held statewide [24 Level I classes and 6 Level II classes]. At SCE, 15 Level I classes and 3 Level II classes

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were conducted.

**V. Program Challenges**

None

**VI. Customer Disputes**

None

**VII. Compliance Items**

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

**D. 03-04-055, Ordering Paragraph 3 states:**

*“No party shall delay program commencement or preparation pending submission of or Commission action on these plans.”*

Response:

The PY03 Statewide BOC program was kicked off after CPUC funding approval on April 17, 2003. The 2003 BOC training courses began in July 2003 [except at PG&E, where two course series began in late June 2003].

**D. 03-04-055, Ordering Paragraph 6 states:**

*“The utilities shall work together to market their statewide programs. To the extent the utilities offer the same programs, they shall advertise them together. Program Implementation Plans and quarterly reports shall describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.”*

Response:

SCE will continue to work together with other utilities to market their statewide programs. To the extent SCE offers the same programs, SCE will advertise them together with the other utilities. SCE’s Program Implementation Plans and quarterly reports describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.

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**D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 9, Building Operator Certification and Training Program states:**

*“Building Operator Certification and Training Program*

*The utilities offered Level I of the program in 2002. For 2003, the utilities propose to work with the program contractor to develop Level II, which would focus on enhanced energy savings strategies for building operators. The Commission fully supports this effort and encourages the utilities.”*

Response:

In compliance with D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 9, during PY2003, the four utilities worked with NEEC to develop a Level II BOC course series, which focuses on enhanced energy savings strategies for California building operators. SCE’s Level II course series, which began in September, was in progress during the fourth quarter.

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Program Title: **Statewide Emerging Technologies**

**I. Program Overview**

The Statewide Emerging Technologies (ET) program is an information-only program that seeks to accelerate the introduction of energy efficient technologies, applications, and analytical tools that are not widely adopted in California. The program addresses all market segments, and is composed of two parts: Demonstration & Information Transfer, and the Emerging Technologies Coordinating Council (ETCC). The program's assessment activities focus on near commercial and commercial energy efficient applications with low market penetration. The projects help to measure, verify, analyze, and document the potential energy savings and demand reduction of specific applications in different market segments. Information Transfer efforts disseminate project results, and are customized to the targeted markets. The ETCC is a statewide information exchange and coordination effort between the investor owned utilities and the California Energy Commission's (CEC) Public Interest Energy Research (PIER) program. Program efforts to select technology applications for assessment projects include working with PIER, as well as, but not limited to, members of the research and design communities, manufacturers, energy efficiency advocates, customer groups, universities, professional societies, national laboratories, government agencies, engineering firms, and industry and trade groups.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$850,000
Preliminary Program Expenditures (includes program commitments)*	\$842,925

\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

2. Total net demand reduction and energy savings:

Based upon the California Public Utilities Commission approved Energy Efficiency Policy Manual, this information program is not expected to provide energy savings targets.

3. Total number of customers served:

**Projected:** The program will initiate a limited number of customer site demonstration projects in 2003, since not all emerging technology assessments require customer site testing and multiple assessments may be

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performed at a single customer site. Currently, five customer site demonstrations are anticipated.

**Actual:** One customer site assessment project was started during the fourth quarter. A total of three customer site assessments were initiated in 2003.

4. Projected and actual number of units:  
Please refer to program activity tables in corresponding program workbook.
5. Total rebate (\$) paid:  
The program does not provide customer rebates.

**III. Program Implementation Status**

1. Status of program delivery  
The program surpassed its goal of six new assessment projects for the year, and initiated nine ET application assessment projects in 2003. The projects will continue into 2004.
2. Customer Enrollment  
The program does not use application forms to enlist customers in the program. Due to the nature of the program and the limited number of customer site demonstrations, customized agreements are negotiated with each customer for each project.
3. Workbook  
Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.
4. Training  
The program neither sponsored nor conducted any training during the course of the quarter.
5. Marketing  
The program did not engage in any marketing activities during the quarter. Several seminars and workshops will be conducted, as part of the program's information transfer activities, once the assessment projects are completed.
6. Hard-to-Reach  
The program does not have specific goals for the hard-to-reach market segments. In general, the information the program generates through its demonstration activities tends to benefit all customers. One of the aims of an ET program is to explore the application a new technology has in various

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market segments, in an effort to characterize the widest possible deployment opportunities. Thus, the program seeks opportunities to host appropriate demonstration projects at hard-to-reach customer sites.

#### IV. Program Accomplishments

##### ETCC Activities

The ETCC did not meet during the fourth quarter.

##### *ET Database Updates*

The ET database was updated with 2003 project information from both the utilities ET programs and the CEC PIER program during the fourth quarter. Summary reports from the database were posted to the ETCC website ([www.ca-etcc.com](http://www.ca-etcc.com)).

##### *Emerging Technology Application Assessments*

SCE initiated a total of nine Emerging Technology Application Assessments in PY2003. During the fourth quarter, SCE committed and initiated two assessments:

- **Lighting Systems Voltage Reducer.** This assessment project will determine the potential demand and energy savings from a lighting system voltage reducer. The assessment will measure system power, voltage, current, and light intensity for several fluorescent and high intensity discharge lighting systems. The assessment will be conducted at Vista Universal's facilities.
- **Stairwell Lighting Bi-level Switching.** This assessment project will evaluate the energy savings potential and illumination impacts from retrofitting stairwell lighting fixtures with bi-level controls and acoustical (ultrasound) motion sensors. This assessment builds upon research from PIER Contract No. 500-01-041-0, Project No. 5.1. Several stairwells within SCE's facilities will be used for the assessment. The assessment will establish an initial set of deemed savings estimates, as well as time-of-use profiles, measure cost and life, for potential use in energy efficiency program planning.

In addition, the following seven assessments initiated during 2003 continue:

- **Anti-Corrosion Surface Coatings for Air-Conditioner Condensers and Evaporators.** New inorganic coatings and cleaning processes for air conditioner condensers and evaporators have become available. The coatings, cleaning, and application processes are reported to significantly

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restore the operating efficiency of existing air conditioning units, and reduce the rate of their future degradation. During the fourth quarter, measurement instrumentation was installed on an existing 5-ton heat pump package unit in one of SCE's facilities in Irwindale. Data collection to establish the unit's base demand and energy usage is underway. Once the baseline measurements are completed, the unit will be cleaned, an anti-corrosion coating applied, and performance monitoring will continue.

- **“Super” T8 Fluorescent Instant Start Lighting System Assessment for Assembly Facilities.** This assessment will document the costs and impacts of retrofitting the lighting system of several building areas of the First Presbyterian Church in Covina. During the fourth quarter, baseline data collection and retrofit construction work were completed at the site.
- **Electrochromic Windows Assessment.** Electrochromic windows can be darkened or lightened electronically allowing the windows to be used as energy-saving devices. The assessment builds upon research from PIER Contract No. 500-01-023. The technology will be installed in SCE's Customer Technology Application Center (CTAC) facilities in Irwindale. The technology was initially slated for a new classroom facility within CTAC. However, due to design and unforeseen logistical problems, the electrochromic windows will be installed elsewhere within the CTAC facilities. Design work to install the windows in a new location is underway.
- **Classroom Advanced Lighting System Assessment.** An advanced T5 HO fluorescent lighting system with dimmable ballasts and daylighting controls will be installed in a new classroom at SCE's CTAC facilities in Irwindale. The classroom construction was completed during the fourth quarter. The lighting system is installed and controls commissioning is underway.
- **Classroom Displacement Ventilation Assessment.** Displacement ventilation is an air distribution system in which incoming air originates at the floor level and rises to exhaust outlets at the ceiling. The technology offers improved indoor air quality with its typical use of 100% outdoor air, and increased occupant comfort with higher supply air temperatures closer to room temperature. The technology will be installed in a new classroom at SCE's CTAC facilities in Irwindale. The classroom was completed during the fourth quarter with a standard packaged air conditioning that will serve to establish the comparison baseline. Portions of the displacement ventilation system were installed during the fourth quarter. Additional design work is underway to complete the system. The

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system's plant components are projected to be designed, fabricated, and installed by the end of the second quarter of 2004.

- **“Super” T8 Fluorescent Rapid Start Lighting System for a Boiler and Chiller Mechanical Room.** This assessment project will determine the impacts of retrofitting a rapid start “Super” T8 fluorescent lighting system into the boiler and chiller mechanical room at the Los Angeles County Internal Services Division’s Los Padrinos Center in Downey. During the fourth quarter, retrofit construction work was completed.
- **Network Management of Computer Energy Star Settings.** This assessment project seeks to determine the demand and energy savings potential of managing the power settings of networked personal computers. The assessment is underway using SCE’s network facilities. During the fourth quarter, new versions of the client and server software programs were installed. The new version of the software supports SQL-based databases and is more suitable for large networks. Currently, the project team is engaged in identifying problems that is keeping the networked computers from entering into hibernation mode at night.

**V. Program Challenges**

There were no specific program challenges during the fourth quarter.

**VI. Customer Disputes**

There were no customer disputes during the fourth quarter.

**VII. Compliance Items**

Based on Decision D.03-04-055, there is no California Public Utilities Commission regulatory compliance item directly related to this program.

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Program Title: **Savings By Design**

**I. Program Overview**

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

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

The SBD program will continue to meet the Commission's goals and objectives for energy efficiency programs. SBD delivers cost-effective, permanent, and verifiable energy savings and peak demands reduction with long term energy savings of between 16 and 20 years, far exceeding the Commission's minimum target of three years. Since 1999 SCE's SBD program has involved thousands of participants and has worked with hundreds of projects and design teams. The program's innovative educational elements and implementation strategies target market barriers and failures.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$8,900,000
Preliminary Program Expenditures (includes program commitments)*	\$ 6,715,527

\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

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2. Total net demand reduction and energy savings:

	<b>Net kW*</b>	<b>Net kWh</b>
<b>Target</b>		
Systems	n/a	n/a
Whole-Building	n/a	n/a
Total	7,818	42,812,895
<b>Actual</b>		
Systems	1,332	10,136,850
Whole-Building	369	1,576,281
Total	1,701	11,713,131
<b>Committed</b>		
Systems	4,528	41,723,423
Whole-Building	4,501	18,089,700
Total	9,030	59,813,123
<b>Total Recorded</b>	10,731	71,526,255

3. Total number of customers served:

    Projected (Annual):

    Actual: 268 projects participating in program.

4. Projected and actual number of units:

    Please refer to program activity tables in corresponding program workbook.

5. Total incentives (\$) paid = \$459,881

    Total incentives (\$) committed = \$4,798,365

**III. Program Implementation Status**

1. Status of program delivery

    The SBD program was rolled out to the public on Commission approval using agreed-to 2003 program rules. The program is on target and no major changes are anticipated.

2. Customer Enrollment

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



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

4. Training  
**Statewide**

Attendees	Category	Date	Location	Title
11 (491 visits)	On-line courses	10/01/03 – 12/31/03	<a href="http://www.energydesignresources.com">www.energydesignresources.com</a>	EDR Online Courses

Savings By Design’s Energy Design Resources presents virtual workshops on topics including Integrated Energy Design, Building Commissioning, High Performance Lighting, High Quality HVAC, Financing and Marketing High Performance Facilities, among others, are available 24/7 on-line.

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To promote Savings By Design objectives, SBD co-sponsored three training courses during the fourth quarter with SCE’s Customer Technology Application Center (CTAC). The objective is to encourage high performance nonresidential building design and construction to architects and designers through education on state-of-the-art strategies and tools.

- The eQUEST hands-on computer training guides the user through eQUEST, a user-friendly, DOE-2 based building simulation tool featuring input wizards and industry standard defaults to simplify modeling.
- Skylighting Guidelines for new facility design explores the benefits and techniques of including skylighting systems in appropriate single-story buildings was co-sponsored at CTAC.
- Savings By Design was a co-sponsor for a Federal Energy Management Program seminar to promote design strategies for low-energy, sustainable buildings.
- Local case studies of SBD participant projects, to underscore the feasibility of potential savings in laboratory facilities, were summarized and presented at the Labs21 seminar co-sponsored by SCE’s Engineering and Design Services and CTAC.

In 2003, SCE’s Savings By Design co-sponsored and/or participated in 21 seminars and workshops throughout the year. These seminars and workshops encompassed a wide spectrum of topics which included Title 24 Nonresidential Energy Efficiency Standards, Design Strategies for High Performance Glass, eQUEST training, Cool Roofs, Rebuild America Technology Series, Lighting, Daylighting, Skylighting, among others, which attracted approximately 968 attendees.

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5. Marketing

<b>List Pieces</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b># w/ Each Method</b>
Statewide Efforts	Total Ordered		4 <sup>th</sup> Quarter 2003
One-Page Flyers		Trade Shows, Facility Manager's Show, As Needed	--
SBD Brochure	1,800 – 4 <sup>th</sup> Qtr 9,300 – 2003 Total	-Hand delivery -SCE's energy centers (CTAC & AgTAC)	Delivered as needed
EDR CDs	170 CDs – 4 <sup>th</sup> Qtr 270 CDs – 2003 Total	Trade Shows, Facility Manager's Show, Environmental Organizations (i.e. Green Resource Center), other	170 CDs
Table Top Promotion	5,000+ Attendees – 2003 Total 200 Attendees – 2003 Total 300 Attendees – 2003 Total	Natural Products Expo AEE Convention Urban Market Place	-- -- --
SBD Energy Efficiency Integration Award Call For Entries	3,505 – 2003 Total	Statewide Mailing	--

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

6. Hard-to-Reach

Savings By Design targeted geographically hard-to-reach customers. For 2003, the program identified the goal as a 25 percent increase over the percentage of participating projects from geographically hard-to-reach customers as identified in 2002. This means SBD program would increase the

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number of projects from HTR geographical areas to a 7.8 percent participation rate in 2003. Through December 31, 2003, 9.0 percent of projects committed and/or paid qualify as hard-to-reach under this definition, exceeding the goal by a 15 percent margin.

As reported earlier in 2003, one outstanding success story involved SCE's working with the California Department of Park and Recreation's Silverwood Visitor's Center, a HTR customer. A whole building analysis was completed for a new 2,800 square foot Visitors' Center to be located at Lake Silverwood in the San Bernardino Mountains, which is geographically a hard-to-reach area.

#### Highlights:

- Commitment made to a high energy efficiency passive design
- Provided needed assistance to characterize its comparative energy performance. The analysis identified the extent by which the project exceeded the Title 24 standard compliance. Ultimately, Title 24 was exceeded by approximately 47 percent,
- The analysis provided by SCE also fulfilled the documentation requirement for the energy component for a LEED certification.
- Some of the measures designed to increase the performance of the building were the use of natural ventilation, use of thermal mass to temper heating and cooling loads, the use of solar hot water radiant space heating, and a daylighting control system utilizing high-performance glazing in combination with photoelectric sensors.
- The integrated design analysis showed that these strategies are expected to save approximately 9,900 kWh and 970 therms per year.

#### IV. Program Accomplishments Statewide

- SBD was recognized as a Premiere Sponsor at the American Institute of Architects, California Council (AIACC) fall meeting at Squaw Valley. This ongoing relationship continues an effort to reinforce AIACC support for integrated energy design principles.
- Savings By Design program management met with key personnel from the University of California, Office of the President (UCOP) to establish working practices for implementing the new UCOP directive mandating green buildings and clean energy, including participation in the Savings By Design program.
- SBD continued support for the development of the California Commissioning Collaborative as well as supporting ongoing Collaborative for High Performance Schools (CHPS) efforts with individual school districts.

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- Savings By Design's website attracted over 3,782 visits, 2,825 unique visitors, and 182,707 hits during the fourth quarter. The website attracted 14,846 visits, 10,882 unique visitors, and 682,902 hits in total for 2003.
- Energy Design Resource's website attracted 12,814 visits, 9,654 unique visitors, and 479,977 hits in the fourth quarter. In 2003, the website attracted a total of 19,491 visits, 14,509 unique visitors, and 791,473 hits.

### **Statewide - Highlights of Program Accomplishments for 2003**

- Addy's Awards – An American Advertising Federation member event. SBD brochure and inserts was presented the GOLD award over 450 competing entries.
- Association of Energy Engineers (AEE) Conference in La Mirada, CA – Services and offering of SBD program to over 200 AEE attendees. Keynote speaker of the event was Commissioner Carl Wood (CPUC).
- Statewide Meeting in San Luis Obispo – The relationship building of the counterparts of the statewide SBD utilities to provide program continuity and consistency.
- Design Focus Report – The Savings By Design program was addressed in January's Architectural Lighting edition as a program that provides design assistance and funding to encourage designers and owners to achieve LEED-like performance.
- AIA National Convention in San Diego - EE Integration Award Ceremony presented 5 awards for Energy Efficiency Design at the National AIA Convention, which attracted approximately 20,000 attendees – 2 Awards of Honor, 2 Awards of Merit, and 1 Special Citation Award.
- 2003 Energy Efficiency Integration Award – The 2003 EE Integration Award winners were announced in a press release.
- The 11<sup>th</sup> National Conference on Building Commissioning in Palm Springs, CA – Owners and providers discussed their successful projects, updates on the newest commissioning tools, research reports on commissioning programs, and a panel discussion on the year's hot topics.
- SBD's partnered with the American Institute of Architects, California Council (AIACC) to co-sponsor the Monterey Design Conference. This conference hosted 626 attendees and held workshops that covered integrated design principles as well as SBD-sponsored seminars on designing energy efficient, green buildings.
- SBD's Energy Design Resources (EDR) component launched a new website which won the following awards:
  - An Honors Award in the Corporate Web Site – Energy category from the International Academy of Communication Arts & Sciences as part of its International iNOVA Awards – 2003

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- The Silver Award in the eMEDIA category of the Beacon Awards, sponsored by the Business Marketing Association’s Northern California chapter – 2003
- The UC system adopted Savings By Design as standard practice for all campuses, requiring SBD participation for all new construction.
- SBD worked with the CEC to develop training and program enhancements to prepare the commercial design and construction industries for upcoming code change.

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- Five projects, ranging from a 300,000 sf multi-story office building to three educational facilities and a refrigerated warehouse, were completed and submitted by design teams participating in the Design Team Incentive component of SBD. Interest in this part of the program begins to grow as tools and process support are enhanced.
- To provide an additional distribution channel for new building science research completed through the California Energy Commission’s PIER program, SCE partnered with the New Buildings Institute to produce two new EDR Design Briefs: Design Guide for Skylights with Suspended Ceilings and an Advanced Variable Air Volume Design Guide. Completion is estimated for second quarter, 2004.

**SCE - Highlights of Program Accomplishments for 2003**

- SCE Business Solutions – SCE’s newsletter to assist nonprofit and small- to mid-sized businesses with resources to save energy, and to save money.
- Municipal Green Building Conference – Co-sponsored by Southern California Gas Company and the LA Chapter of the US Green Building Council to promote Savings By Design and Energy Design Resources.
- Rebuild America Series: The Building Envelope – The design and technologies seminar focused on issues pertaining to the building envelope, such as windows, daylighting technologies, and reflective roofs.
- Vendor Appreciation Event – Savings By Design participated in Business Solution’s Annual Vendor Seminar and Vendor Appreciation Breakfast at CTAC, with approximately 300 vendors.

**V. Program Challenges**

None

**VI. Customer Disputes**

None

**VII. Compliance Items**

None

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Program Results Workbook**

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Program Title: **Statewide Energy Efficiency Education and Training**

**I. Program Overview**

The statewide Energy Efficiency Education and Training program continues to be offered in the service areas of Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), and Southern California Gas Company (SoCalGas). Overall, the program promotes energy efficiency to a variety of customer segments through energy centers (physical and virtual) and other informational programs. The educational and information efforts of the energy centers and of SDG&E cover a broad spectrum of market actors including customers, midstream actors such as the design, engineering and contracting communities, and upstream market actors. The motivations to make use of education and training services include reducing operational costs, increasing productivity and profitability, and designing more efficient new buildings.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$5,700,000
Preliminary Program Expenditures (includes program commitments)*	\$5,552,597

\*Expenditures to date = actual thru December 31, 2003. Program commitments not included.

2. Total net demand reduction and energy savings:

Based upon the California Public Utilities Commission approved Energy Efficiency Policy Manual, this information program is not expected to demonstrate energy savings or demand reductions.

3. Total number of energy center EE customers served:

Projected: 6,250  
Actual YTD = 7,468

4. Projected and actual number of units:

Please refer to program activity tables in corresponding program workbook.

5. Total rebate (\$) paid:

The program does not provide customer rebates.

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**III. Program Implementation Status**

1. Status of program delivery  
No changes were made to the program implementation plan.
  
2. Customer Enrollment  
The program does not use application forms to enlist customers in the program.
  
3. Workbook  
Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.
  
4. Training  
The Energy Centers' goal for 2003 was 200 EE events. EE Events are a minimum of two hours during which a group or an individual is provided extensive information on energy efficient technology and/or the application of energy efficient technology to increase their knowledge and improve the efficiency of their home or business. This includes events through which customers are provided information about available programs and services. EE Events consist of seminars and workshops which use a classroom venue to provide information, facility tours, presentations to customer groups, equipment demonstrations, and customer consultations.

41 events were provided during the Fourth Quarter 2003:

<b>Date</b>	<b>Event (CTAC)</b>	<b>Location</b>	<b>HTR</b>	<b>J.U.</b>
10/06/03	Cal State Long Beach			
10/07/03	Efficiency Techniques for Industrial Refrigeration	Costa Mesa		
10/08/03	Basic Heating, Ventilation and Air Conditioning (HVAC)			
10/09/03	Advanced Lighting Technologies			X
10/14/03	Managing your Energy Systems			
10/16/03	Technology Update			
10/22/03	Energy Efficient Supermarket Refrigeration			X
10/23/03	Lighting for Interior Design			
10/29/03	Commercial and Industrial Lighting			
10/29/03	Lighting and Daylighting for Architects & Designers (Port Hueneme)	Port Hueneme		
10/30/03	eQuest Quick Energy Simulation Tool			
11/04/03	Lighting Fixture Maintenance			
11/04/03	Basic Heating, Ventilation and Air Conditioning			



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11/05/03	Energy Efficiency Audit - Port Hueneme Naval Base	Port Hueneme		
11/06/03	Energy Efficiency Audit - Port Hueneme Naval Base	Port Hueneme		
11/06/03	Implementing Energy Efficiency Projects			
11/12/03	Design Strategies for High Performance Glass			X
11/12/03	Cooling Tower Efficiency			
11/13/03	Rebuild America Series - Commissioning & Financing			
11/14/03	10th Annual Water Conference			
11/17/03	Compressed Air System Efficiency			X
11/18/03	meile/veit training		X	
11/19/03	Industrial Maintenance			X
11/20/03	Laboratories for the 21st Century			
11/21/03	Lighting & Daylighting - Victor Valley College	Victorville	X	X
12/02/03	High Intensity Discharge Lighting (HID)			
12/09/03	Skylighting for Commerical & Industrial Buildings			X
12/10/03	How To Manage Your Business's Energy Costs			
12/10/03 12/11/03	FEMP Design Strategies for Low-Energy, Sustainable Buildings			
12/16/03	Building Operator Certification I (BOC)			
12/18/03	Building Operator Certification II (BOC)			

Date	Event (AGTAC)	Location	HTR	J.U.
10/16/03	Use & Apply Fertilizers Through Your Irrigation System	AgTAC	X	
10/23/03	Instrumentation and Sensors	AgTAC	X	
10/29/03	Prime Movers	AgTAC	X	X
10/30/03	Industrial Refrigeration	AgTAC	X	X
11/12/03	School Energy Efficiency Program(SEE)	AgTAC	X	
11/13/03	Well Cleaning	AgTAC	X	
11/18	Technology Update	AgTAC	X	X
11/19/03	Efficient Technologies for Commercial Refrigeration	AgTAC	X	X
12/5/03	Wastewater Treatment Energy Efficiency	AgTAC	X	X
12/16/03	Implementing Energy Efficient Projects	AgTAC	X	X

5. Marketing

The marketing materials used to promote the events listed above are:

Event (CTAC)	Marketing Piece	Delivery Method	# Distributed
Energy Efficient Supermarket Refrigeration	Flyer	Email	2000

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Rebuild America Series - Commissioning & Financing	Flyer	Email	2000
10th Annual Water Conference	Flyer	Email US Mail	2000 595
Laboratories for the 21st Century Mass	Flyer	Email	2000
4th Qtr Calendar of Events	Calendar Calendar	US Mail Hand – delivered	29,292 10,000
<a href="http://www.sce.com/ctac">www.sce.com/ctac</a>	Website	Internet	n/a

<b>Event (AGTAC)</b>	<b>Marketing Piece</b>	<b>Delivery Method</b>	<b># Distributed</b>
4 <sup>th</sup> Quarter Classes	Quarterly Mailer	Direct Mail	8532
4 <sup>th</sup> Quarter Classes	Quarterly	Handout	400
4 <sup>th</sup> Quarter Classes	Website Calendar	E-Mail	-----
4 <sup>th</sup> Quarter Classes	Quarterly	E-Mail	424
Wastewater Treatment	Flyer	Direct Mail	252
<a href="http://www.sce.com/agtac">www.sce.com/agtac</a>	Website	Internet	n/a

6. Hard to Reach

For 2003, the hard-to-reach (HTR) target was to hold 75 events in HTR markets. By the end of the fourth quarter 2003, 81 HTR events were held year-to-date. They are a subset of the list above and are identified in the HTR column.

**IV. Program Accomplishments**

CTAC/AgTAC Energy Centers

Following are accomplishments from October 1st-December 31<sup>st</sup> 2003.

EE Events completed October-December = 41

Attendance at those events October-December = 1000

EE Events completed YTD = 231

Attendance at those events YTD = 5216

EE HTR Events completed October – December = 12

Attendance at those events October – December = 234

EE HTR Events complete YTD = 81

Attendance at those events YTD = 1353

EE consultations less than 2 hours October-December = 117

Attendees in those consultations October-December = 305

EE consultations less than 2 hours YTD = 570

Attendees in those consultations YTD = 895

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EE equipment demonstrations less than 2 hours October-December = 118  
Attendees at those demonstrations October-December = 200

EE equipment demonstrations less than 2 hours YTD = 1788  
Attendees at those demonstrations YTD = 1357

EE Outreach events participated in from October-December = 28  
Attendees at the Outreach events from October-December = 7802

EE Outreach events participated in YTD = 177  
Attendees at the Outreach events YTD = 258,051

New displays developed include:

- AGTAC
  - No new displays at AgTAC in 4<sup>th</sup> Qtr
  
- CTAC
  - The NewDaylight Center is a 1000 square foot meeting area that features the following EE technologies
    - Daylighting and solar responsive lighting/dimming controls
    - T-5 indirect/direct lighting system
    - Displacement Ventilation for improved comfort and indoor air quality
    - High Performance glazing
    - Single ply membrane “Cool Roof”

Joint Utility events completed January-March = 15  
Joint Utility events completed April-June = 20  
Joint Utility events completed July-September = 17  
Joint Utility events completed October-December = 21  
Joint Utility events YTD = 68

They are a subset of EE Events referenced above and are identified in the table in Section III.4.

In December, AGTAC held its 4th annual Festival of Lights Energy Efficiency Event. Schools, clubs and local business organizations participated in creating and decorating 40 lighted displays. Drive-thru public viewing was available 3 to 4 hours nightly over a two week period. Energy tip cards were distributed to attendees and energy efficiency message boards were viewed by 13,108 event visitors.

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#### Informational Services

For 2003, the Agricultural informational activities are included along with the Commercial and Industrial activities. SCE was also directed to develop and list its agricultural customer contact target for 2003. In compliance with that directive, SCE identified 1,900 customer contacts as the 2003 target. Through the end of the year, SCE has achieved 2,733 agricultural customer contacts.

#### Product Labeling

Throughout the 4<sup>th</sup> quarter, the retailers were kept well supplied with energy efficiency brochures and applications to encourage customers to make the energy efficient choice of products. During the last two weeks of December, consistent with the program closing on December 31, 2003, all materials related to the program were retrieved from the retailers' displays.

#### **V. Program Challenges**

Challenges include identification of HTR customers. Of the four HTR criteria, two are readily identifiable. SCE has information on the geographic location of the business and also on the size (kW) of the business. However, without specific input from the customer, SCE does not have information on whether the business leases or owns their facility, nor can they identify if a language other than English is spoken at the business. Individual participants in events do not always know if their facility is leased or they might be hesitant to indicate if English is not the primary language used. A few customers have resented being asked and indicated they considered the question discriminatory. Therefore, we are relying principally on geography and size to determine if a customer is HTR.

#### **VI. Customer Disputes**

None

#### **VII. Compliance Items**

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

#### **Decision 03-04-055, Ordering Paragraph 3 states:**

*“No party shall delay program commencement or preparation pending submission of or Commission action on these plans.”*

Response:

Program commencement and preparation were not delayed pending submission of or Commission action on these plans.

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**Decision 03-04-055, Ordering Paragraph 6 states:**

*The utilities shall work together to market their statewide programs. To the extent the utilities offer the same programs, they shall advertise them together. Program Implementation Plans and quarterly reports shall describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.*

Response:

SCE will work together with other utilities to market their statewide programs. To the extent SCE offers the same programs SCE will advertise them together with the other utilities. SCE's Program Implementation Plans and quarterly reports describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.

**Decision 03-04-055, Attachment 2, page 26, states:**

*“SCE should indicate its target numbers of customer contacts [for SCE's Pump Test and Hydraulic Services program] for 2003 in its quarterly report.”*

Response:

Funding and resources for this activity have been transferred from SCE's 2003 Pump Test and Hydraulic Services program to SCE's Education and Training program. Targets and achievements are listed in the Program Accomplishments section of this report.

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Program Title: **Codes and Standards Advocacy, Statewide**

**I. Program Overview**

The statewide Codes and Standards Advocacy program promotes enhancements to energy efficiency standards and codes. Codes and Standards Enhancement (CASE) studies are performed for promising design practices and technologies. Study results are presented to standards and code-setting bodies during the public rulemaking process to encourage adoption of energy efficiency measures. Expert witness testimony and additional analysis are provided throughout the rulemaking process as needed. Enforcement activities include participation in development of standards documents and strategic educational efforts.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$1,150,000
Preliminary Program Expenditures (includes program commitments)*	\$1,303,252

\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

2. Total net demand reduction and energy savings:  
Not applicable for this information program.

3. Total number of customers served:  
The Statewide Codes and Standards program focuses on upgrades and enhancements in the energy efficiency standards and codes thereby benefiting all Californians.

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

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

**III. Program Implementation Status**

1. Status of program delivery  
CASE studies are being conducted and under development for funding in the 2003 program year.

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2. Customer Enrollment  
Not applicable for this information program.
3. Workbook  
Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.
4. Training  
No training was offered in the third quarter.
5. Marketing  
The program did not conduct any marketing activities during this quarter.
6. Hard to Reach  
Codes and Standards activities support hard-to-reach market segments by advocating cost effective code enhancements that promote energy efficiency for all building types and appliances included in the California standards.

**IV. Program Accomplishments**

During the fourth quarter, SCE continued work on or initiated the following 2003 CASE studies.

<b>Building and Appliance Standards Code Enhancements</b>
Vending Machines (Phase 1)
Skylight efficacy test
T-5 lamp and photometric & durability test
Design Guideline for Compressed Air Systems
Acceptance Testing for the Hospitality Segment
Ground-source Heat Pump Modeling Assessment
Advanced Building Design Guideline
High efficacy signage
T-5 high output fluorescent
Natural ventilation design guideline
Automated weather processor
Testing of economizers for 5-ton A/C
TDU version of eQuest
Field test of unitary HVAC equipment
Lighting design guidelines

**V. Program Challenges**

None



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**VI. Customer Disputes**

None

**VII. Compliance Items**

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

**Decision 03-04-055, Ordering Paragraph 3 states:**

*“No party shall delay program commencement or preparation pending submission of or Commission action on these plans.”*

Response:

Program commencement and preparation were not delayed pending submission of or Commission action on these plans.

**Decision 03-04-055, Ordering Paragraph 6 states:**

*The utilities shall work together to market their statewide programs. To the extent the utilities offer the same programs, they shall advertise them together. Program Implementation Plans and quarterly reports shall describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.*

Response:

SCE will work together with other utilities to market their statewide programs. To the extent SCE offers the same programs SCE will advertise them together with the other utilities. SCE’s Program Implementation Plans and quarterly reports describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.

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Program Title: **Upstream Residential Lighting**

**I. Program Overview**

This statewide program works with interested multi-location retailers and manufacturers to offer point-of-sale (POS) discounts for ENERGY STAR<sup>®</sup> labeled lighting products. Customers receive a \$1 or \$2 per lamp discount when purchasing ENERGY STAR<sup>®</sup> compact fluorescent lamps (CFLs) at participating retailers and a \$5 or \$10 per fixture discount when purchasing ENERGY STAR<sup>®</sup> hardwired or plug-in pin based indoor or outdoor CFL lighting.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$2,000,000
Preliminary Program Expenditures (includes program commitments)*	\$1,966,800

\*Expenditures to date = actual thru December 31, 2003. Program commitments not included.

2. Total net demand reduction and energy savings

	<b>Net Peak kW</b>	<b>Net kWh</b>	<b>Net Therms</b>
Target	4,913	34,959,185	N/A
Actual	5,681	40,532,514	N/A
Committed	114	723,817	N/A
Actual and Committed (Recorded)	5,795	41,256,331	N/A

Note: The statewide team discovered late in the first quarter of 2003 that the incandescent equivalent assumptions provided by ENERGY STAR<sup>®</sup> on which the program's energy savings calculations are based are different than the ENERGY STAR<sup>®</sup> equivalencies published in the manufacturer's specifications. This discovery led to a revision to the energy and demand savings assumptions for certain CFLs by PG&E. SCE was in agreement with PG&E's revisions, but chose later not to submit revisions due to a prevailing desire to remain consistent throughout the year with the previously accepted methodology of the implementation plans. The decision not to revise was in concert with SDG&E. SCE tracked results according to both sets of calculation methodologies, and surpassed all kWh and kW targets when measured by either set.

3. Total number of customers served

- Projected: 978,697
- Actual: Not Tracked – rebates for 921,839 units were paid or allocated. Avg. units per customer is unknown.

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4. Projected and actual number of units  
Please refer to activity tables in corresponding program workbook.
  
5. Total rebate (\$) paid = \$1,672,719  
Total rebate (\$) committed = \$36,516

**III. Program Implementation Status**

1. Status of program delivery  
In compliance with D. 03-04-055, the 2003 programs began April 2003.
  
2. Customer Enrollment  
Sample copies of the program applications for retailers and manufacturers were sent to the California Public Utilities Commission's Energy Division.
  
3. Workbook  
Please refer to workbook for details of program expenditures and program activities.
  
4. Training  
Personalized training of manufacturers and statewide retailers in invoice processing and program parameters occurred throughout the fourth quarter on an ad-hoc basis.
  
5. Marketing  
Marketing to participants is complete. It was done through email and phoned announcements of the various promotions as a statewide team. Primary marketing to customers is done by participants. The IOUs approve materials and provide stickers to put on eligible product packages. Sticker quantities disseminated equaled the amount of packages to be shipped in the fourth quarter.

Secondary mass marketing is done by means of multi-program brochures and materials, the sce.com website, and bill inserts. In September 2003 SCE sent a bill insert to all 4.3 million residential SCE customers promoting ENERGY STAR® Lighting, the California Flex Your Power message, and the EPA's Change A Light campaign. It featured TV star Steve Thomas giving energy-saving tips recommending ENERGY STAR® labeled compact fluorescent lighting. Manufacturers and retailers used in-store promotional materials, newspaper, radio, and circular advertising to attract customers to buy program-discounted lighting products.

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6. Hard-to-Reach

In 2003, SCE was assigned goals to expend at least 15 percent of the incentives spent to retailers in geographic HTR areas and 10 percent of the incentives to food and drug stores. As of the fourth quarter, \$410,028 or 24 percent of the total incentives was paid to retailers in geographic HTR areas and \$341,760 or 20 percent was paid to grocery or drug retailers. SCE also took part in ethnic outreach events to reach customers for whom English is a second language.

**IV. Program Accomplishments**

Statewide Fourth Quarter Accomplishments

- Product was allocated so as to be available in stores during the Flex Your Power seasonal lighting campaign.
- The IOUs continued support and participation in the Program for the Evaluation and Analysis of Residential Lighting (PEARL) which tests residential lighting products available from retailers.
- The IOUs were active in providing support to changes in the specification for both ENERGY STAR® CFLs and fixtures. These proposed changes will also raise the bar for quality energy efficiency products for California's consumers.
- The IOUs worked with Kema Xenergy to assist in providing the data to identify a lower incremental cost for CFLs, which will allow a more accurate account of program cost-effectiveness. This information was used in the 2004/2005 program filings.

SCE Program Activities

- The IOUs reallocated funding from manufacturers who fell short of commitments to achieve the program's energy saving targets.
- The 2004/2005 program was planned and developed

**V. Program Challenges**

None.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

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

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**Decision 03-04-055, Ordering Paragraph 6 states:**

*“The utilities shall work together to market their statewide programs. To the extent the utilities offer the same programs, they shall advertise them together. Program Implementation Plans and quarterly reports shall describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.”*

**Response:**

SCE continues to work together with the other utilities to market the statewide program. SCE coordinated with the statewide team to process reservation requests and invoices in a consistent manner and continues to monitor and verify participant compliance with consistent standards. SCE’s Program Implementation Plans and quarterly reports describe utility efforts to coordinate programs. SCE continues to focus all PGC-funded marketing for programs in this decision on energy efficiency messages.

**Decision 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 11, Upstream Residential Lighting Program states:**

*“ Upstream Residential Lighting Program”*

*“The utilities propose reducing the incentives for lower wattage units because wholesale pricing for the lower wattage units has become more competitive. We find the IOUs’ proposed tiered rebates reasonable and approve them.”*

**Response:**

In compliance with D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 11, SCE’s 2003 Upstream Residential Lighting Program includes reduced incentives for lower wattage units compared to 2002.

*“As in 2002, the utilities must increase the quantity of products provided to non-traditional delivery channels such as grocery stores, drug stores, and outlets in remote locations. We will again require that at least 15% of the rebate budget be reserved for customers in rural areas, and at least 10% of the rebate funds be reserved for redemption through purchases from new delivery channels of grocery and drug stores.” (id., p. 19)*

**Response:**

In compliance with D. 03-04-055, Attachment 2, “2003 IOU Statewide Programs,” Item 11, SCE’s 2003 program plan requires that at least 15 percent of the rebate budget be reserved for customers in rural areas, and at least 10 percent

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of the rebate funds be reserved for redemption through purchases from new delivery channels of grocery and drug stores.

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**Attachment A  
Program Results Workbook**



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Program Title: **Statewide Marketing and Outreach**

**I. Program Overview**

**Flex Your Power -**

**Flex Your Power** (FYP), managed by the Efficiency Partnership (EP), is a statewide energy efficiency marketing and outreach campaign that builds upon the historically successful Flex Your Power campaign initiated in 2001. The goal of the campaign is to build awareness of the benefits of energy efficiency and build demand for energy-efficient products, designs and services. The statewide campaign also promotes the hundreds of programs and resources available to all sectors, including utility, third party and others, as well as facilitates the statewide coordination and marketing and outreach of these programs. The campaign uses, among other things, paid and earned media, events, partnerships with businesses, governments and non-profits, printed educational materials, website and electronic newsletter to achieve these goals.

The target markets of the marketing and outreach efforts are General, African American and non-English speaking (Hispanic, Asian, Middle Eastern among several others) residents (both urban and rural), institutions, commercial and industrial businesses including hard-to-reach small and rural businesses throughout California.

**Runyon Saltzman & Einhorn -**

Runyon Saltzman & Einhorn, Inc.'s (RS&E) *Reach for the Stars* campaign is a statewide marketing and outreach program focused on promoting energy efficiency messages to low-income utility customers in rural areas. The campaign, using traditional and non-traditional marketing strategies, encourages residential energy users to make permanent energy efficient upgrades to their homes and participate in statewide energy efficiency programs. It also informs them about available low-income assistance programs to help with energy efficiency measures and utility bills.

The *Reach for the Stars* campaign includes three flights of newspaper ads and radio spots, as well as a community-based outreach component. Utility customers are encouraged to call a toll-free phone line, which provides contact information regarding utility programs.

**Univision -**

The Univision Television Energy Efficiency Marketing Program is a statewide marketing and outreach effort for Spanish-speaking, residential energy customers developed and implemented by the joint venture of **Univision Television Group and Staples/Hutchinson and Associates, Inc.**

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**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget – Efficiency Partnership (FYP)	\$15,000,000
Preliminary Program Expenditures*	\$15,020,364
Authorized Budget – Efficiency Partnership (Univision)	\$3,000,000
Preliminary Program Expenditures*	\$3,000,000
Authorized Budget – Efficiency Partnership (RS&E)	\$2,507,459
Preliminary Program Expenditures*	\$2,383,925

\*Preliminary expenditures to date thru December 31, 2003 (may not include commitments or pending payment amounts for this period).

2. Total net demand reduction and energy savings:

Based upon the California Public Utilities Commission approved Energy Efficiency Policy Manual, this marketing and outreach program is not expected to demonstrate energy savings or demand reductions.

3. Total number of customers served:

Not applicable

4. Projected and actual number of units:

Not applicable

5. Total rebate (\$) paid:

Not applicable to this information program.

**III. Program Implementation Status**

1. Status of program delivery

**FYP –**

During the 4<sup>th</sup> quarter of 2003, Flex Your Power continued to build on and expand its programs including the Flex Your Power website; the eNewswire; commercial sector outreach; and the residential energy efficiency promotions, which included expanded partnership development, advertising (television, radio and newspaper), production and distribution of educational materials and outreach to manufacturers and retailers. Flex Your Power successfully implemented all programs, delivering more than projected on advertising reach through public service announcements and expanded reach into non-English communities through ethnic print media. Specifically, Flex Your Power successfully launched and implemented a cooperative promotional effort with manufacturers and retailers designed to increase the depth of their commitment to promoting energy efficiency in California; launched the New

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Homes Initiative designed to support IOU, third party and Energy Star programs directed to single and multifamily residential builders and to expand the market for energy-efficient single and multiple unit homes; and successfully implemented a media outreach effort targeted at the hundreds of ethnic print media in the state.

**RS&E –**

RS&E created two newspaper ads and two radio spots for the third of three media flights. Flight three ads ran in newspapers and radio stations reaching rural areas throughout the state.

All creative materials were submitted to the administrator for review, editing and approval.

The toll-free, informational phone line continued to receive calls.

The CBOs have been implementing outreach activities during the fourth quarter. They submitted progress reports to the CBO coordinator October 8 and final reports December 12.

After budget analysis, RS&E identified budget dollars that had become available due to higher than expected spending efficiencies. As a result, RS&E was able to add the following activities to its implementation plan:

- Development of PowerPoint presentation for community-based outreach.
- Public relations/outreach activities (researching, identifying and engaging in speaking opportunities, holding speakers' training workshops for community-based organizations, media relations) in rural markets throughout California.
- Production of a 13-minute energy efficiency outreach video featuring dramatized home energy audits. 200 videos will be distributed to CBOs for use in presentations and can be shared with third-party programs.

**Univision –**

See activities described in Univision's Marketing section.

**2. Customer Enrollment**

Not applicable. However, the FYP campaign recruited 1,544 retailers to participate in this year's final energy efficiency promotion. The FYP campaign also sent the biweekly Flex Your Power eNewswire to more than 4,300 people and organizations representing all segments in the state (IOUs, municipal utilities, businesses including small business, schools, state and local government, water agencies, community-based organizations and more).

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3. Workbook

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

4. Training

**FYP –**

Not applicable. However, one of the commitments retailers agreed to was the training of their sales staff to sell energy-efficient products. Roughly 1,544 retailers utilized the training materials produced by Flex Your Power.

**RS&E –**

In November and December, RS&E conducted a series of six speakers' training workshops for community-based organizations.

**Univision –**

The program did not sponsor any training during the quarter.

5. Marketing

**FYP –**

As part of the 3<sup>rd</sup> and final energy efficiency promotion, which ran from October 20 through November 9, 2003, Flex Your Power retail partners distributed and used the following educational materials:

- Energy-Efficient Appliance Educational Materials
  - Salesperson Training Guide
  - Salesperson pocket fact card
  - Point-of-Purchase Easel card
  - Appliance Clings
- Energy-Efficient Home Improvement Products Educational Materials
  - Salesperson Training Guide
  - Salesperson pocket fact card
- Energy-Efficient Lighting Educational Materials
  - Consumer Fact Card
- General Energy Efficiency Educational Materials
  - Consumer Rebate Cards in:
    - English
    - Chinese
    - Spanish
    - Korean
    - Vietnamese
  - Energy Efficiency Poster in:

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- English
- Chinese
- Spanish
- Korean
- Vietnamese

Through marketing partnerships with major retailers and manufacturers, Flex Your Power also developed additional educational materials including:

- Flyers promoting energy-efficient appliances, appliance recycling and energy saving tips to be distributed by Sears service professionals.
- Brochures in English and Spanish promoting energy-efficient appliances, appliance recycling and energy saving tips to be distributed by Sears service professionals.
- Direct mail piece to targeted audiences promoting energy-efficient appliances.
- Header board (signage displayed over energy-efficient product aisles) promoting energy-efficient lighting.
- Additional full-page print ads with retailer and manufacturer cooperative funding promoting energy-efficient appliances.
- Direct mail postcard promoting energy-efficient appliances and products.
- Circular ads with major retailers promoting energy-efficient products and appliances.

Pieces described in detail under the Residential Outreach heading shown in the Program Accomplishment section for FYP.

#### **RS&E – Reach for the Stars**

RS&E's "Reach for the Stars" energy efficiency campaign is a comprehensive statewide energy efficiency communications campaign directed to low-income utility customers in rural areas.

During this quarter, RS&E:

- Produced and ran xx new flight three black-and-white newspaper ads promoting energy efficient heating measures in rural newspapers.
- Produced two new flight three radio spots, promoting energy efficient heating and lighting measures.
- Maintained a single point of contact for all consumers through the creation of a toll-free phone line to provide IOU energy efficiency program contact information.
- Coordinated with vendor, Muto-Dolk LLC, to conduct the second and third of three customer surveys in rural areas.

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- Coordinated with Muto-Dolk LLC to conduct focus group testing in Bakersfield and Eureka.
- Produced 13-minute energy efficiency video/DVD to use in outreach efforts.
- Developed PowerPoint presentation for use in outreach efforts.
- Provided support to CBOs, held conference calls, and processed outreach reports from CBOs.

#### **Univision -**

As noted earlier, the television campaign was augmented with a Univision booth at special cultural and community events. To take advantage of these direct marketing opportunities, UTEEM developed and built 11 interactive displays. At any one time, two people could compare the manual strength required to generate enough power to light a CFL versus a traditional incandescent bulb of the same wattage.

The interactive display drew crowds to the booth area so that the Univision staff could distribute the UTEEM consumer information brochure. Available in Spanish and English versions, the brochure explained the 2003 Energy Efficiency Programs, the process for obtaining rebates, financial assistance programs, and the online home energy audit program.

Because excessive heat is often an issue at outdoor events, paper fans were imprinted with the IOU toll-free phone numbers and distributed, along with the brochures, to Hispanic audiences at events throughout the state. Please see the Attachment – *U-TEEM Local Event Integration* – for a market-by-market summary of the numbers of individuals reached through these events.

The Univision commercial schedule was further enhanced by interviews with IOU and CPUC spokespersons on locally produced Univision talk shows:

- KFTV-TV Fresno *Noticias*, 2 interviews
- KABE-TV Bakersfield *Kern County at Large*, 2 interviews
- KUVS-TV Sacramento *Voz y Voto*, 30-minute interview with Commissioner Kennedy aired on 9 Univision stations
- KBNT-TV San Diego *Despierta San Diego*, 2 interviews
- KFVS-TV San Francisco, *Noticias*, 2 interviews
- KYVE-TV Yuma/El Centro, *Noticias*, 1 interview
- KPMR-TV Palm Springs (Goleta) *Noticias*, 1 interview

Total talk show broadcasts: 19.

#### 5. Hard to Reach

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#### FYP –

As stated in the 2<sup>nd</sup> and 3<sup>rd</sup> Quarter Reports, both the advertising and outreach aspects of the Flex Your Power campaign for 2003 utilize the most impactful and cost-effective means of reaching hard-to-reach residential customers (non-English speaking, rural and low income). The communication vehicles include:

- *Mass media marketing:* By the very nature of the extensive media buys, the marketing campaign via TV, radio and newspaper advertisements had a significant impact on general market and hard-to-reach residents throughout the state. To specifically target California's Asian population, Flex Your Power developed and ran flights of Asian-language advertisements on Asian-language television stations. To target the Spanish-speaking population, Flex Your Power developed and ran Spanish-language radio commercials and coordinated with Univision, to which the CPUC awarded funding to reach the Spanish-language market via television spots on Univision stations. All of the media buys cover rural and low-income areas.

The full-page newspaper ads are designed to drive demand for energy-efficient products and direct customers to participating retailers in each area. More than 30 percent of Flex Your Power's participating retailers serve areas considered to have high saturation of rural customers; the number is significantly higher for low-income; and non-English speaking customers – almost 60 percent of the retailers are associated with ethnic press zip codes.

- *Ethnic Media Outreach:* In the 4<sup>th</sup> quarter, Flex Your Power initiated an intensive ethnic media outreach (described in more detail below) to newspapers that serve hard-to-reach communities. Flex Your Power partnered with and placed ads in 105 ethnic media publications (total circulation of 4,197,488 residents) representing 16 ethnic groups and 13 languages.
- *Educational and Training materials:* The educational materials for the energy efficiency promotions were printed in five different languages – English, Spanish, Chinese, Vietnamese and Korean – and hundreds of retailers requested the non-English materials (542 Spanish, 68 Chinese, 29 Korean, 37 Vietnamese). The cooperative marketing and outreach partnership educational materials were printed in English and Spanish and distributed by Flex Your Power's partners to thousands of residents statewide. The New Homes Initiative educational materials were printed in English and Spanish.

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- *eNewswire*: Flex Your Power distributed the biweekly Flex Your Power eNewswire to thousands of Californians, including hundreds of community-based organizations, many of which directly serve hard-to-reach audiences (described in detail below).
- *Commercial outreach*: Flex Your Power's business recruitment efforts included of all major chambers of commerce and business associations, several of which represent hard-to-reach nonresidential customers: small and/or minority-owned businesses.

#### **RS&E –**

##### **Reach for the Stars**

The CPUC Energy Efficiency Policy Manual identifies a rural location as a qualification criterion for a hard-to-reach population in California. Because RS&E is targeting populations within rural areas, all of RS&E's targeted markets are hard to reach.

##### **Univision -**

UTEEM is wholly targeted to the hard-to-reach Hispanic market, specifically those whose language barrier prevents them from participating in the IOUs' rebate and energy reduction programs. Univision's dominance in California's major and secondary media markets allowed us to effectively reach 98% of California's Spanish-speaking population.

## **IV. Program Accomplishments**

#### **FYP –**

Flex Your Power continued to coordinate with program providers in the state to ensure consistent statewide materials and messaging to customers, and to provide marketing and outreach support to programs. Accomplishments in the 4<sup>th</sup> quarter of 2003 included:

- Coordinated with IOUs and third parties on educational material development.
- Worked with municipal utilities on energy efficiency program and promotion coordination.
- Coordinated with municipal utilities – LADWP, SMUD and others – for coordinated statewide marketing and outreach in support of energy efficiency.
- Coordinated with IOUs, municipal utilities, Economic Development Corporations, business associations and hundreds of businesses on the business outreach initiative to achieve increased energy efficiency.
- Continued to integrate third-party programs on Flex Your Power website and promote their programs via the eNewswire.



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- Developed a partnership with the Water Awareness Campaign (CWAC), California Urban Water Conservation Council (CUWCC) (representing more than 150 water agencies), and Association of California Water Agencies (ACWA) to develop a unified campaign incorporating the “saving water saves energy” messages and the messaging of water agencies into Flex Your Power’s campaign.

#### Website

Flex Your Power continued to develop the Flex Your Power website, [www.fypower.com](http://www.fypower.com), which provides information on energy efficiency including detailed descriptions of all the energy efficiency programs and services of the IOUs, third parties, municipal utilities and water agencies in the state. In addition to expanding the resources and database-driven locators described in our 3<sup>rd</sup> Quarter Report, Flex Your Power accomplished the following during the 4<sup>th</sup> quarter:

- *Finished and put up an “Efficient New Homes” section* with the following features:
  - Database-driven locator to help residents find energy-efficient properties available for sale and rent in California. Flex Your Power gathered information from homebuilders throughout California about their energy-efficient developments. The locator draws from a database containing information on more than 10,000 new homes/apartments within 71 developments in the state that exceed Title 24 building standards by at least 15% (to be uploaded in January 2004).
  - Information and resources for homebuyers looking to buy or rent new energy-efficient homes.
  - Information and resources for builders looking to build new energy-efficient homes.
- *Translated Residential section into Spanish.* Spanish-speaking customers will be able to access all HTML content from the home page. (Translation and testing accomplished in 2003. Site features to be launched in 2004.)
- *Translated Residential section into Chinese.* Chinese-speaking customers will be able to access all HTML content from the home page. (Translation and testing accomplished in 2003. Site features to be launched in 2004.)
- *Added rebate information from more than 100 water agencies* into database-driven locator.
- *Catalogued and published searchable database of articles and studies* about energy efficiency and related issues.
- *Updated and rotated Features Section* on the home page on a regular basis, including:
  - “Natural Gas Prices Are on the Rise. What Does This Mean for Californians?”
  - “Saving Water Saves Energy”

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- “Shape California's Future in Energy Efficiency: Participate in CPUC Workshops”
- *Updated and rotated reports and news stories* on a regular basis on the index page of each sector (Residential, Commercial, Industrial, Institutional and Agricultural).

#### eNewswire

During the 4<sup>th</sup> quarter of 2003, Flex Your Power continued to produce the Flex Your Power eNewswire, an electronic newsletter that serves as the supplemental marketing and outreach tool of Flex Your Power's Internet presence.

Accomplishments in the 4<sup>th</sup> quarter include:

- *Expanded the eNewswire distribution list.* The e-newsletter reaches a growing list of more than 4,300 people across sectors in Flex Your Power's target audience. Readership includes policymakers, program implementers, trade associations, research institutions, manufacturers, retailers and businesses of all kinds. In the 4<sup>th</sup> quarter, we added key leaders across sectors; builders of energy-efficient homes; relevant reporters at trade, business and general market media outlets including editors and publishers serving ethnic markets; and other interested parties.
- *Expanded editorial coverage.* The goal is to keep energy efficiency among the top-of-mind interests of Californians and educate and excite them about the current ideas, policies, programs and products. In the 4<sup>th</sup> quarter, the eNewswire served as a tool to expand and deepen relationships with California businesses and business associations through publication of success stories that publicly recognize Californian's efforts and provide examples for others to follow. Additionally, Flex Your Power expanded the presence of water efficiency efforts on eNewswire with several water efficiency stories and publicized the Flex Your Power water survey to more than one hundred water agencies.

#### Residential Outreach

On October 20, 2003, Flex Your Power launched the final of three marketing and outreach campaigns to educate consumers and to promote the purchase of energy-efficient home improvement products, appliances and lighting. In addition to energy efficiency tips for consumers, the Flex Your Power promotional materials and in-store displays for 2003 provide specific information about statewide rebates and resources so that residents can find local incentives on a wide variety of appliances, home improvement products and lighting. The training materials enable sales associates across the state to provide accurate and timely information about their energy-efficient products and about utility incentives. The promotion accomplishments in the 4<sup>th</sup> quarter included:

- *Launched and expanded mass media campaign* to heighten awareness of energy efficiency in General and non-English markets:

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- Television advertisements promoting energy efficiency that began on October 20 and ran through November 9;
- Radio advertisements promoting energy efficiency that began on October 20 and ran through November 9;
- Public service announcements – more than 3,000 television and more than 3,000 radio – promoting energy efficiency that began on October 20 and ran through November 9;
- Newspaper ads in 40 general market papers and more than 100 ethnic newspapers statewide (see ethnic medial outreach section below for more detailed description of ethnic media effort). The ads featured energy-efficient product messages as well as listed participating local retailers. Ethnic newspapers represented:
  - 14 different languages (Chinese, Spanish, Korean, Vietnamese, Filipino, Japanese (Kanji), Cambodian (Khmer), Thai, Russian, Armenian, Arabic, Farsi, Pakistani and Portuguese)
  - 16 ethnic communities (African-American, Chinese, Hispanic, Korean, Vietnamese, Filipino, Asian-Indian, Japanese, Cambodian, Thai, Russian, Armenian, Arabic, Pakistani, Portuguese and Iranian).
- Cable channel advertisements. Through a partnership with the California Cable & Telecommunications Association (CCTA), Flex Your Power aired more than 900 Flex Your Power television ads on cable stations statewide at no cost. Total for year is 3,500 ads.
- *Recruited industry participation* to increase sales of energy-efficient appliances and products. Roughly 1,544 retailers joined in the promotion, including all major appliance and energy-efficient product manufacturers, major chains and independent retailers including scores that serve hard-to-reach customers and/or are classified as hard-to-reach nonresidential customers. The requirements for participation in this promotion were the same as set forth in the 2<sup>nd</sup> and 3<sup>rd</sup> quarter report. Flex Your Power targeted appliance, hardware and home improvement/lighting stores for participation. Hundreds of retailers requested and were provided materials in additional languages.
- *Produced and distributed educational materials.* Materials described above.
- *Provided individualized service to participating stores* by customizing packages of retailer educational materials (separate lighting, appliance, and home improvement store educational materials) and printing corresponding retail information on materials shipped to retailers.
- *Produced and distributed educational materials sample kits* to continually expand number of participating retailers.

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- *Launched cooperative marketing and outreach partnerships* that leverage private sector resources. During the 4<sup>th</sup> quarter, Flex Your Power launched several innovative, cooperative marketing and outreach partnerships with retailers and manufacturers. All of this marketing and outreach was in addition to the advertisements and marketing outlined in the 2003 PIP. Under the cooperative partnership, manufacturers and retailers contribute to the cost of additional advertisements and/or in-store promotions. The cooperative program is laying the groundwork for making energy efficiency and Flex Your Power part of manufacturers' and retailers' ongoing message to consumers. Moreover, this additional private sector funding increases the level of participation and stimulates more creativity from the private sector in marketing energy-efficient products. In addition to augmenting Flex Your Power's marketing and outreach, the private sector was asked to provide additional financial incentives and/or marketing to the public to promote the purchase of energy-efficient products. The projects in the 4<sup>th</sup> quarter included:
  - Flyer with Sears and PG&E in English. Distributed by Sears professionals on service calls in PG&E service territory. Offers a coupon for 10% off Energy Star appliances at Sears and advertises PG&E rebates on natural gas furnaces, clothes washers, dishwashers and natural gas water heaters.
  - Brochure with Sears for non-PG&E service territories in English and Spanish. Delivered by Sears professionals on service calls in California. Offers a coupon for 10% off Energy Star appliances good through April 2004. Provides general educational information and specific information on heating and cooling, water efficiency and appliance recycling.
  - Direct mail flyer with Maytag. Letter with energy efficiency information from Flex Your Power on the front and Maytag incentives on the back. Mailed to 360,010 Northern California addresses.
  - Headerboard with Feit Electric in Dixieline Lumber/Home Centers stores. Placed four-foot long headerboards in all 10 Dixieline Lumber/Home Centers stores in California. Headerboards will hang over the lighting section in stores for 6-12 months and explain the benefits of Energy Star lighting.
  - Full-page print ad with Dixieline Lumber/Home Centers. Ad ran in the San Diego Tribune (circulation approximately 350,000) on November 28, 2003.
  - Direct mail postcard with Brand Source. Mailed to 1 million people and customized for participating dealers. Features information on energy efficiency, Energy Star appliances and dealer and Maytag incentives for Energy Star products.

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- Full-page print ad with Maytag and Howard's TV & Appliances. Ran in Orange County Register (circulation approx. 300,000) on December 12 and 13 and in Los Angeles Times (circulation approx. 1 million) on December 17. Featured information on energy-efficient products and Energy Star-qualified Maytag products at stores.
- Circular ad with Lowe's. Featured educational messages and energy-efficient products that are available in all of Lowe's California stores.
- Began building new and expanding current partnerships and projects for 2004-05.

### **Ethnic Media Outreach**

In addition to the outreach to non-English speaking customers through television, radio and print materials, Flex Your Power launched an aggressive targeted outreach initiative to more than one hundred ethnic print media sources to ensure the energy efficiency message reached all residents statewide. The goal was to engage ethnic newspapers in educating the communities they serve on energy efficiency through advertising, events and editorial content.

During the 4<sup>th</sup> quarter, Flex Your Power

- *Met with more than 100 ethnic media publishers* to engage their editorial support for energy efficiency. These publications:
  - Represent 14 different languages (Chinese, Spanish, Korean, Vietnamese, Filipino, Japanese (Kanji), Cambodian (Khmer), Thai, Russian, Armenian, Arabic, Farsi, Pakistani and Portuguese).
  - Serve 16 ethnic communities (African-American, Chinese, Hispanic, Korean, Vietnamese, Filipino, Asian-Indian, Japanese, Cambodian, Thai, Russian, Armenian, Arabic, Pakistani, Portuguese and Iranian).
- *Developed and ran ads* in more than 100 papers. Ads featured energy-efficient product messages as well as local retailers that sell energy-efficient products (described above).
- *Wrote energy efficiency educational pieces* that appeared in more than 50 different publications, which represented 14 different languages and targeted 16 different ethnic groups in California.
- *Wrote op-ed essays in support of energy efficiency* for 27 different publications, which represented 14 different languages and targeted 16 different ethnic groups in California.
- *Began designing a comprehensive ethnic press strategy for 2004-05.*

### **Commercial and Industrial Sector-Targeted Outreach**

Flex Your Power continued to communicate with the commercial and industrial sectors through the Flex Your Power eNewswire, as well as the targeted Business

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Leader outreach initiative. The Business Leader Initiative provides information and education on the business and financial benefits of implementing energy efficiency measures to the decision-makers, and assists these leaders on how to take action. Accomplishments included:

- *Gathered commitments from business leaders* to do the following:
  - Support the aggressive statewide energy saving goals and commit to reduce total power consumption;
  - Buy and install cost-effective and energy-efficient products when replacing or installing new lighting, equipment and appliances;
  - Distribute to employees an internal energy usage survey that will identify cost-effective best practices.
- *Recruited and provided outreach materials* to all major chambers of commerce and business associations including Silicon Valley Manufacturers Group, California Chamber of Commerce, Los Angeles Chamber of Commerce, and the California Business Roundtable to reach out to their members. These organizations also included those that serve hard-to-reach customers: small or minority-owned businesses.
- *Placed articles in chamber and organization newsletters.* Articles covered energy efficiency and Flex Your Power's continuing efforts to provide assistance.
- *Linked organization's websites* to the Flex Your Power website.
- *Communicated biweekly* with business leaders through the eNewswire.

### **New Homes Initiative**

Designed to support IOU, third party and Energy Star New Homes programs and to expand the market for energy-efficient single-family and multiple-unit homes, the Flex Your Power New Homes Initiative is an innovative partnership with the homebuilder industry. In the face of rising housing costs and a surge in new home construction, the energy-efficient home market represents an important target of statewide marketing and outreach. Accomplishments in the 4<sup>th</sup> quarter included:

- *Coordinated with IOUs:* Flex Your Power coordinated the Flex Your Power New Homes Initiative ad campaign with the IOU's Residential New Construction programs to expand the reach of both efforts.
- *Contacted and surveyed hundreds of California builders.*
- *Formed partnerships* with more than 50 builders, representing more than 12,000 homes or apartments.
- *Developed a print media ad,* which highlights Energy Star Builders
- *Developed an Energy-Efficient Homes Brochure,* which highlights the benefits of an energy-efficient home or apartment. Spanish-language brochures were also developed; participating affordable housing

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developers wanted help explaining the benefits of energy efficiency to their Spanish-speaking tenants.

- *Activated the interactive New Homes Locator Map* on the Flex Your Power website. The map includes more than 80 energy-efficient home developments in California and informs users about where to find new home developments that exceed Title 24 by 15% or more.
- *Coordinated with U.S. EPA* to link Flex Your Power website to Energy Star New Homes page.
- *Designed a campaign with builders and builder association* to increase the number of homes to be built in excess of Title 24 in 2004-05.

### Local Government-Targeted Outreach

In addition to continued communication with more than 100 city and county energy coordinators through the Flex Your Power eNewswire, Flex Your Power:

- *Contacted and began developing commitments with major cities and counties* to partner with the campaign, to support the aggressive statewide energy saving goals, to reduce total power consumption and to continually educate their communities and employees about energy efficiency.
- *Met with various city officials*, including those from the City and County of Los Angeles, to discuss incorporating municipal utilities into the statewide effort and developing outreach plans for small businesses.
- *Secured ad space* in the Annual League of California Cities Directory, which is distributed annually to hundreds of city officials throughout the state.

### Flex Your Power Awards

To educate and inspire Californians to implement energy efficiency, Flex Your Power designed the 2003 Flex Your Power Energy Award in collaboration with organizations including the League of California Cities (LCC), the Building Owners and Managers Association (BOMA) of California and utility companies.

The 2003 Flex Your Power Energy Awards initiative culminated during the 4<sup>th</sup> quarter of 2003. Flex Your Power aggressively outreached to a broad array of state and local governments, education representatives, retailers, restaurant and hospitality representatives, agriculture and community-based organizations, businesses and individuals. After a thorough review of all applications and materials submitted, Flex Your Power recommended winners to an external panel of utility representatives and others. The award winners will be officially announced and honored at a ceremony in early 2004 that will include cabinet secretaries from the new administration (as was done for the 2002 award ceremony). Flex Your Power has begun drafting case studies of the award winners' accomplishments, which will be publicized in the eNewswire and on the Flex Your Power website.

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#### Additional Outreach/ Events

Flex Your Power representatives attended, recruited participation for, presented at and/or hosted a number of events to build awareness of energy efficiency. The most notable included:

- *Moorepark School District*: Coordinated with the Moorepark School District for a school outreach program.
- *CPUC Workshop Series*: Presented information on marketing and outreach on the residential sector panel, and helped recruit private sector participation for all three panels for the 2<sup>nd</sup> workshop, Customer Needs.
- *Lowe's Energy Efficiency Fair*: Arranged and helped implement an "Energy Efficiency Fair" in coordination and with funding from Anaheim Public Utilities on November 22 at a Lowe's retail outlet in Anaheim, CA to educate residents about energy efficiency. Staffed a table with information.
- *Howard's TV & Appliances Training Sessions*: Conducted in-person training session on Flex Your Power and benefits of high-efficiency appliances for 90 sales associates of Howard's TV & Appliances.
- *Ethnic media meetings and interviews*: Met with more than 100 ethnic media publishers and reporters and conducted scores of one-on-one interviews.
- *Ethnic Media Awards*: Presented on energy efficiency and ethnic media's role in educating their readership at the New California Media Awards, dubbed "the Ethnic Pulitzers" by the News Hour with Jim Lehrer. The ceremony honored 19 ethnic media journalists in categories ranging from investigative reporting to health and environmental coverage. The NCM Awards constitute the first multi-ethnic awards program in the country to recognize journalistic excellence in non-English language media.

#### RS&E –

##### *Media Summary*

During the fourth quarter, *Reach for the Stars* radio spots and newspaper ads ran in rural markets throughout the state with the following projected results:

- Readership total: 18,336,600
- Listenership total: 58,655,513

##### *Community-Based Outreach*

Between October and December 2003, the 11-member Stars Outreach Team continued to promote the campaign to target audiences through a variety of innovative strategies. They truly became "experts" on energy efficiency and spread the word throughout their communities via presentations, events, contests and media outreach.



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A conference call was conducted in early October to give community partners an opportunity to discuss campaign updates as well as challenges and opportunities that had occurred in the early stages of the project. The call enabled members to learn from each other and to collaborate on successful activities. The call also provided an opportunity to discuss the process and procedures for placing campaign advertisements in selected print, outdoor and theatre venues.

Nearly every team member was able to extend the campaign's reach by placing "Reach for the Stars" print ads in local newspapers and newsletters and other venues such as bus interiors, movie theatres, appliance stores and others. Since most had never worked with advertising, they were able to use the technical assistance provided by RS&E to learn how to identify appropriate venues, how to negotiate rates and how to facilitate actual placement of the ads. These exercises not only helped to promote the campaign, but many members expressed gratitude for the learning opportunity that enhanced the capacity of their agencies and allowed them to forge new relationships with local businesses and other community organizations.

#### **"Reach for the Stars" Media Training**

In addition to their participation in outreach activities, six member agencies participated in a one-day media training conducted by RS&E staff and media consultant Gary Dietrich.

The interactive training was intended to show participants how to promote "Reach for the Stars" through local print and broadcast media outlets. Training topics included:

- Identifying media outlets that appeal to target populations
- Developing key messages and strategies
- Understanding the workings of different media outlets and how best to promote a story
- Interview techniques for delivering key messages

The training also included individual "on camera" mock interviews that were critiqued by the training staff and other participants. All participants interviewed received a videotape of their interviews as well as a listing of all local media outlets and contact persons.

Evaluations from the training participants were extremely positive. One participant wrote:

"I liked the 'personal' approach of the media training, including the feedback and helpful hints in handling difficult situations. The taping of a television interview was very helpful in actually seeing ourselves in that situation. The handouts were excellent, too. This was an excellent workshop and I wouldn't change a thing. I

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would recommend this training to board members, executive directors, and members of the community that deal with the public and the media. Thank you for this opportunity!"

**A sampling of outreach activities that occurred between October and December 2003:**

The *Reach for the Stars* portable exhibit and collateral distribution occurred at the following community events:

*(approximate number of participants that viewed or visited the exhibit in parentheses)*

- Gilroy Health Fair (1,400)
- San Benito County Fair (7,000)
- Gavilan College in Hollister - Registration and Events (600)
- Boron 20 Mule Team Days in Kern County (3,000)
- Kern County Fair (10,000)
- Bellevue School Back to School Night –Atwater (750)
- Merced County Agency Fair-Atwater (500)
- Apple Harvest Festival in Fortuna (8,000)
- Riverside County Energy Clinics (800)
- Connecting Communities-UC Riverside (100)
- Annual Riverside County Fall Children’s Conference (200)
- Victorville Chamber of Commerce Breakfast (400)
- Walmart Community Service Event (1,000)
- High Desert Fall Senior’s Fair (1,000)
- Humboldt County collateral distribution at the following: Radio Shack; Bayshore Mall, Eureka Radio Shack; Myrtle Ave, Eureka; Radio Shack; Valley West, Arcata; Sears Bayshore; Mall, Eureka; Poletski’s; Appliance Center (8,500)

*Reach for the Stars* community outreach partner agencies conducted presentations to various target audiences including, but not limited to the following: *(numbers in attendance for presentations in parentheses)*

- Feather River Senior Citizens Center (100)
- Butte County Head Start Managers (35)
- Butte County Migrant Education (250)
- Gavilan College managers (35)
- Humboldt Manila Community Center Community Thanksgiving Feast (250)
- Humboldt Senior Resource Center (5 in attendance, 250 picked up materials)
- Ridgecrest Collaborative of Kern County (45 agencies)
- Frazier Park Healthy Start (12 agencies)
- Family Resource Council of Merced (40 agencies)

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- Merced County Youth Council-Work Force Investment (40 agencies)
- Hemet One-Stop (25 staff and volunteers)
- Hemet Rotary Club (25)
- Kiwanis Club of Victorville (64)
- Silverado High School in Victor Valley (26)
- Serrano High School in Victor Valley (44)

Additional locally-designed outreach activities during this period included, but were not limited to: (*circulation/households reach in parentheses*)

- Magnet distribution on appliances at local hardware store (100)
- Press release of Poster Contest Winner to Butte county newspapers (54,500)
- Public Service Announcement on Clear-Channel radio stations in San Benito County (106,000)
- Newsletter article in Gavilan College Campus News for employees (350)
- Article in Humboldt County 4-H Monthly newsletter (550)
- Pastels on the Plaza (Eureka), October 4, 2003 chalk artwork promotion (6,000)
- Reach for the Stars 2004 Calendar (Humboldt) with winning posters (150 households)
- Humboldt Times Standard press release (22,000)
- Campaign materials mailed to all 88 churches in Kings County (20,000- 30,000 house holds)
- Campaign materials mailed to families from 4 schools in Kings County (1,400 households)
- Home visits in Kings County (20 households)
- Information placed on Kings County United Way web page (80 households)
- Door-to-door collateral distribution by youth from Boys and Girls Clubs of Atwater (150 homes)
- Campaign Slim Jims placed in December billing envelope for Merced Irrigation District residential customers (700 households)
- El Herald Newspaper Article (in Spanish) (3,000 households)
- Rohnerville Rancherias's Bear River Bulletin (282 households)
- Riverside County faith group (25 members)
- Riverside Community Action Partnership "ActionGram" Newsletter article (2,000 households)
- Public Service Announcement on Radio Merced (six access stations) (5000 households)

*Reach for the Stars* collaborative activities, including, but not limited to: (*collaborating agencies in parentheses*)

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- 21<sup>st</sup> Century Community Learning Centers After School Programs (Police Activities League and Ceres Unified School District)
- Gavilan College Video/Public Service Announcement (Community Media Access Partnership; Gavilan College TV; Gavilan College Digital Media program)
- Public Service Announcement Writing Project (Tehachapi High School; KUZZ Radio; Buck Owens Productions)
- Poster Contest at Bakersfield Magnet School (Thorner Elementary School, County of Kern)
- Hanford Fairview Senior Center, The Remington (Senior lodging), Avenal Senior Center- Halloween Lunch, Lemoore Senior Center, Corcoran Senior Center (Kings County United Way and Kings County Commission on Aging)
- “Boys and Girls Clubs of Merced County Kids, Creativity” (Merced Irrigation District, Merced County Arts Council, Family Resource Council (40 participating agencies))
- Redwood Energy Education Project Cross Age and Peer Presentations (Humboldt Bay High School; Lafayette Elementary School; Grant Elementary School; Ridgewood Elementary School)
- Poster Award Presentation at High Desert Cultural Art Center (High Desert Cultural Art Center Artists and The Shenanagins, musical group)

Ads promoting the *Reach for the Stars* campaign were placed by outreach agencies in the following venues: (*circulation/households reached in parentheses*)

- Billboards with winning poster were displayed in Oroville-Gridley area and Chico-Paradise area (15,000 viewers per day x 30 days=450,000)
- Butte County Community Bulletin Boards (2,000)
- Ceres Courier (30,000 x 7 weeks=210,000)
- Signature Movie Theatres in Turlock (10,000 per week x 16 weeks=160,000)
- Campaign banner for Turlock Music Festival (20,000 attendees)
- Gavilan College Rambler (3,000)
- Hollister Freelance (17,000)
- San Benito County Pinnacle (20,000)
- Hollister Direct (20,000)
- Golden Empire Transit- Bakersfield Bus Line inside ads in 90 buses (2 months @ 50,000 per week = 400,000)
- Kings County agency placed small print ads in various community agencies on front doors, windows, or walls (800)
- Atwater Times (700)
- Merced Sun Star Big Valley Direct Mailer (40,000)

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- University Village Metro 10 Theatre Complex in Riverside (9,160 per week x 10 weeks = 91,600)
- Lowe's Store in Victorville (campaign magnets on 25 display appliances)

**Univision –**

The Univision Television Energy Efficiency Marketing campaign was initiated the week of June 16 and ended November 9, 2003. By the end of November, when all schedules had aired, the program had reached approximately 165,876,000 gross impressions in the target audience of viewers between 18 and 49. This is 120% of the original goal. This number does not include the viewers reached by the Univision station serving the Chico-Redding market. Due to the market size, Nielsen does not provide audience levels for this station. Station estimates are available, but cannot be verified.<sup>1</sup>

UTEEM's goal for the 2003 television commercial schedule was a total of 6,943 commercials. The actual number of spots aired was 1,464 60-second, 4,026 30-second and 2,772 10-second commercials to air during the entire schedule for a comprehensive total of 8,262 commercials.

The total number of spots aired was 119% of the goal.

The cost to the program of reaching every 1,000 viewers with the energy efficiency program message was \$17.

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<sup>1</sup> A.C. Nielsen Company is a market research firm nationally relied upon for providing measurements of national and local television audiences.

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Commercials aired according to the following schedule:

<b>Commercials</b>	<b>% of Schedule</b>	<b>Length</b>	<b>Start Date</b>	<b>End Date</b>
<i>Appliance Rebates</i>	100%	30-sec	June 16, 2003	July 6, 2003
<i>Appliance Rebates</i>	100%	10-sec		
<i>Programmable Thermostat</i>	100%	60-sec	July 7, 2003	July 20, 2003
<i>Programmable Thermostat</i>	100%	10-sec		
<i>Air Conditioning</i>	100%	30-sec	July 21, 2003	August 10, 2003
<i>Cooling Equipment</i>	50%	10-sec		
<i>Appliance Rebates</i>	50%	10-sec		
<i>Programmable Thermostat</i>			August 11, 2003	August 17, 2003
<i>Cooling Equipment</i>	100%	30-sec	August 18, 2003	September 7, 2003
<i>Cooling Equipment</i>	100%	10-sec		
<i>Programmable Thermostat</i>	50%	60-sec	September 8, 2003	October 11, 2003
<i>Programmable Thermostat</i>	50%	10-sec		
<i>Furnace Rebates</i>	50%	60-sec	September 8, 2003	October 11, 2003
<i>Furnace Rebates</i>	50%	10-sec		
<i>Appliance Rebates</i>			October 12, 2003	October 19, 2003
<i>Lighting</i>	100%	30-sec	October 20, 2003	November 1, 2003
<i>Lighting</i>	100%	10-sec		
<i>Home Energy Survey</i>	100%	60-sec	November 2, 2003	November 9, 2003
<i>Home Energy Survey</i>	100%	10-sec		

UTEEM subcontracted with Research 360, a third-party independent research firm, to evaluate the success of the commercials in communicating the energy efficiency messages. The researcher used a combined qualitative/quantitative approach to make this determination.

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In October, Research 360 organized and interviewed six Hispanic focus groups. Eleven individuals were recruited per group to assure a turn-out of at least 8 per group. As a result, sample size for UTEEM's evaluation will be 50 Hispanic consumers.

The qualitative/quantitative Hybrid method required a more structured interview than is typical with traditional focus groups, which is summarized as follows:

The UTEEM commercials and brochure were shown to the consumers (in a random order over the total project).

Participants individually scored each piece on a scale of 1-5 on a number of measures that reflect the communications goals for the piece.

The focus group participants then discussed their reactions to and impressions of each piece without specifically explaining their scoring.

Each successive piece was be handled in this same way.

The researcher prepared the results of the focus groups in two forms:

In-depth attitudes of the consumers toward the communications pieces, and

Numerical scores for each communications piece.

The UTEEM commercials received high marks for delivering an understandable message, raising interest in energy efficiency and increasing awareness of the IOUs as sources for information.

### **Outreach Results**

Univision stations reported that the interactive display generated a great deal of interest. Because booth staff had been formally oriented to the program, they were able to answer questions and direct people to sources for additional information. Please see Attachment B for a summary of special events.

During 2002, talk show interviews with IOU and CPUC representatives were provided by the stations as a mid-schedule add-on to the original program. For the 2003 program, UTEEM was able to schedule an interview on *Voz y Voto* (Voice of the People), a popular program that is produced in Sacramento and airs on 9 of the 11 Univision stations.

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**V. Program Challenges**

**FYP –**

None.

**RS&E –**

As mentioned under “status of program delivery” RS&E identified budget dollars that had become available due to higher than expected spending efficiencies. As a result, RS&E worked with CPUC and SCE staff to add additional outreach activities to its program implementation plan.

**Univision -**

The experience of planning, producing and implementing the U-TEEM program has been a pleasure. During 2002, there were some logistical challenges in obtaining accurate and timely information from all four IOUs regarding the programs in which they were participating and the specific information they wanted included in the commercials.

This year, the program administrator polled all IOUs for vital information and function as clearinghouse for UTEEM. This streamlined approval procedures considerably.

As with 2002, television schedules, as set forth in the original proposal, were somewhat affected by seasonal variances in viewership among the 11 stations. By increasing the total number of commercials aired and running the schedule into November, we were able to achieve and exceed our proposed goal for the number of gross viewer impressions.

The interactive display and program materials at special events was particularly popular with Hispanic consumers. In the future, we would include these materials at events not specifically targeted to Spanish-speaking energy customers, as well.

Had the program been approved for an earlier start, UTEEM could have taken advantage of the state’s many Cinco de Mayo celebrations in May and greatly increased the number of people reached through special events.

**VI. Customer Disputes**

None.

**VII. Compliance Items**

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



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**Decision 03-04-055, Ordering Paragraph 3 states:**

*“No party shall delay program commencement or preparation pending submission of or Commission action on these plans.”*

Response:

Program commencement and preparation were not delayed pending submission of or Commission action on these plans.

**Decision 03-04-055, Ordering Paragraph 6 states:**

*The utilities shall work together to market their statewide programs. To the extent the utilities offer the same programs, they shall advertise them together. Program Implementation Plans and quarterly reports shall describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.*

Response:

The statewide Marketing and Outreach programs are working with utilities to market the statewide programs.

**Decision 03-04-055, Ordering Paragraph 2 states:**

*“All statewide marketing and outreach programs receiving funding shall file and serve, within 60 days from the date the Commission approves this decision, Program Implementation Plans (Plans) for each funded program. Each party shall also post their Plans on their websites in a prominent and easy-to-find location. The Plans shall contain the information set forth in this decision.”*

Response:

The statewide Marketing and Outreach programs filed their revised program implementation plans within 60 days from the date the Commission approved Decision 03-04-055.

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**Attachment A  
Program Results Workbook**

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

**I. Program Overview**

The Residential In-Home Energy Survey program provides residential customers, particularly hard-to-reach (HTR) customers who do not respond to on-line and mail-in survey options, with a more personalized, face-to-face energy survey.

Upon the customer’s request, an appointment is scheduled, and a trained energy auditor is sent to the customer’s home to assess energy usage and to provide energy-saving recommendations. Energy auditors are bilingual and would conduct in-home surveys in Spanish, if requested.

Customers are provided with information on energy efficiency products and services, rebate programs and other energy-related information to encourage the adoption of energy efficiency measures identified in the in-home survey.

**II. Program Summary**

1. Total program budget:

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$750,000
Preliminary Program Expenditures (includes program commitments)*	\$547,933

\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

2. Total net demand reduction and energy savings:

Based upon the California Public Utilities Commission approved Energy Efficiency Policy Manual, this information program is not expected to demonstrate energy savings or demand reductions.

3. Total number of customers served:

<b>2003</b>	<b>In-Home Survey Targets</b>
Target	4,500
Actual	5,362

Target per decision 04-04-055, Attachment 2, page 24.

Actual (including program commitments) = [actual + committed thru December 31, 2003]

4. Projected and actual number of units:

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Please refer to program activity tables in corresponding program workbook.

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

**III. Program Implementation Status**

- 1. Status of program delivery  
SCE met with the contractor to discuss improvements in program delivery. Improvements for 2003 will include new targeted mailings to hard-to-reach (HTR) customers.
- 2. Customer Enrollment  
Two blank copies of the program application forms were sent to the Commission's Energy Division
- 3. Workbook  
Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.
- 4. Training  
Typically, customer training is not conducted due to the nature of the program. The energy surveys are created in simplified form to have the in-home auditor helping the customer to complete an energy survey.
- 5. Marketing

<b>Description</b>	<b>Quantity</b>	<b>Method of Delivery</b>	<b>Number with Each Method</b>
Direct mail	None, achieved goal in 3 <sup>rd</sup> quarter	n/a	1,532

- 6. Hard-to-Reach  
The In-Home Energy Survey has the advantage of being able to respond to the needs of certain hard-to-reach (HTR) customer groups by providing an alternative delivery channel to the statewide Home Energy Efficiency Survey program through individual interaction.  
SCE continues to target Spanish-speaking customers and has expanded the outreach program to include customers identified by HTR zip codes utilizing direct mail.

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SCE's HTR goal is to achieve at least 50 percent participation or 2,250 of completed surveys by HTR customers as defined by the CPUC. In 2003, SCE has achieved 70 percent of 3,759 surveys conducted for customers in HTR zip codes in SCE's service territory. Of the 3,759 HTR surveys, 587 were conducted in Spanish.

#### IV. Program Accomplishments

Program accomplishments during the fourth quarter are listed below:

- SCE achieved 1,532 completed surveys, and 850 or 55 percent were HTR.
- SCE continued efforts to achieve equity and remove market barriers by enhancing access of energy efficiency programs for non-English speaking customers. SCE developed and implemented a three-month pilot program that involved working side-by-side with local community-based organization to promote the survey programs and other SCE rebate and incentive programs to the Spanish-speaking communities.
- Energy auditors promoted the Refrigerator Recycling and Single Family Energy Efficiency Programs. The auditors explained the benefits and provided customers with refrigerator recycling brochures and rebate applications.
- The SCE Call Center and the Mobile Educational Unit continued to promote the Residential In-home Energy Survey Program and provide referrals.
- SCE and So Cal Gas discussed ways to conduct combined gas and electric in-home energy surveys.

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**V. Program Challenges**

The techniques used for outreach and promotion of the In-Home Energy Survey Program in past years are proving to be less effective this year. In the past, direct mail and phone center referrals have been sufficient to satisfy program goals. With the introduction of HTR goals in 2002, which tends to limit availability of the program, and less than anticipated phone center activity, the number of completed surveys was below the goal through the first quarter.

In an effort to make the outreach process more effective, SCE modified the direct mail strategy to target all HTR customers in SCE service territory.

**VI. Customer Disputes**

None

**VII. Compliance Items**

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

**Decision 03-04-055, Ordering Paragraph 3 states:**

*“No party shall delay program commencement or preparation pending submission of or Commission action on these plans.”*

Response:

Program commencement and preparation were not delayed pending submission of or Commission action on these plans.

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**Attachment A  
Program Results Workbook**

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

**I. Program Overview**

The Small Nonresidential Hard-to-Reach program, implemented as the Small Business Lighting Retrofit program, offers energy efficiency information, equipment and literature to small business customers in areas identified as hard-to-reach by the CPUC and located within SCE's service territory. SCE's hard-to-reach customers are defined as all customers who are located in rural zip codes and/or all customers with a monthly demand of less than 20 kW. The program is designed to introduce small business customers to the benefits of energy efficiency through lighting system upgrades. The upgrades consist of the replacement of low efficiency lighting with high efficiency lighting. The upgrades are provided after an energy audit is performed. The audit helps to demonstrate to the customer the potential for energy savings. Since cost is major concern for the small business owner, and the largest barrier to participation in the traditional rebates programs, all program services are provided free of charge. Professional electrical contractors, hired through a competitive bid process, provide the audits and installation of the lighting system upgrades.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$1,400,000
Preliminary Program Expenditures (includes program commitments)*	1,382,854

\*Expenditures to date (including program commitments) = [actual + committed thru December 30, 2003]

2. Total net demand reduction and energy savings:

	<b>Net kW*</b>	<b>Net kWh*</b>
<b>Projected</b>	1,134	5,216,208
<b>Actual</b>	1,005	4,745,221
<b>Committed</b>	104	496,755
<b>Total Recorded</b>	1,110	5,241,976

\*Per Decision 03-04-055, Table 2b.



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3. Total number of customers served:  
Projected: 800  
Actual: 924
4. Projected and actual number of units:  
Please refer to program activity tables in corresponding program workbook.
5. Total rebate (\$) paid:  
Paid =\$1,011,562 Committed = \$111,394

**III. Program Implementation Status**

2. Status of program delivery  
Most of contractor retrofit activities are completed. Remaining commitments on final construction.
2. Customer Enrollment  
Program signups are no longer being accepted.
3. Workbook  
Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.
4. Training  
No additional vendor training conducted during this quarter.
5. Marketing  
Program is program marketing ceased after program was fully committed.
6. Hard to Reach  
Due to the nature and focus of the program which targeted only very small nonresidential customers (i.e., under 20 kW), typically located in the rural communities, there were no specific hard-to-reach targets assigned to the program.

**IV. Program Accomplishments**

Program achieved its energy savings goal. Increasing demand for the program is evident as word-of-mouth referrals are being received outside the designated rural zip code list. New area marketed in the central valley yielded expected results. As with last year, the program is very well received by hard-to-reach small business customers.

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**V. Program Challenges**

None

**VI. Customer Disputes**

None

**VII. Compliance Items**

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

**Decision 03-04-055, Ordering Paragraph 3 states:**

*“No party shall delay program commencement or preparation pending submission of or Commission action on these plans.”*

Response:

Program commencement and preparation were not delayed pending submission of or Commission action on these plans.

**Decision 03-04-055, Ordering Paragraph 6 states:**

*“The utilities shall work together to market their statewide programs. To the extent the utilities offer the same programs, they shall advertise them together. Program Implementation Plans and quarterly reports shall describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.”*

Response:

SCE will work together with other utilities to market their statewide programs. To the extent SCE offers the same programs SCE will advertise them together with the other utilities. SCE’s Program Implementation Plans and quarterly reports describe utility efforts to coordinate programs. Utilities shall focus all PGC-funded marketing for programs in this decision on energy efficiency messages.

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

**I. Program Overview**

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

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$1,350,000
Preliminary Program Expenditures (includes program commitments)*	\$ 1,369,512

\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

2. Total net demand reduction and energy savings:

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

3. Total number of customers served:

Projected Pump Tests = 3,200 (Annual goal)

Actual tests performed during the fourth quarter = 918

Total pump tests performed to date = 3,646

4. Projected and actual number of units:

Please refer to program activity tables in corresponding program workbook.

5. Total rebate (\$) paid:

Not applicable to this information program.

**III. Program Implementation Status**

1. Status of program delivery

No change from the approved program implementation plan.

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2. Customer Enrollment  
Two blank copies of the program application forms were sent to the Commission's Energy Division.
3. Workbook  
Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.
4. Training  
None
5. Marketing  
In order to promote the Pump Test and Hydraulic Services (PT&HS) program, SCE sponsored the Home Town Utility event at AgTAC in Tulare, CA during the fourth quarter. Approximately forty customers attended the convention and received an overview of the pump test program on how to implement energy efficiency measures and how to save energy.

As members of the energy committee, SCE's personnel attended and participated at the American Water Works Association (AWWA) Conference in this quarter. During the conference, Danny Johnson, manager of the PT&HS program, gave a presentation on the pump test program to approximately 40 attendees.

In addition, a promotional mailing was completed during the fourth quarter. A letter was mailed to 50 Hard-To-Reach customers, who have not participated in the program for the last three years. Of the customers who received the mailers, 4 percent of the HTR customers responded back requesting Pump Test Services. Overall, approximately 200 letters were mailed to HTR customers throughout 2003 with 6 percent of those customers requesting service.

In 2003, SCE Pump Test program participated in the 36<sup>th</sup> annual World Ag Expo in Tulare, CA which attracted over 100,000 people. Over 900 attendees engaged in various discussions and demonstrations, and received SCE's Pumping Productivity Manuals and Pumping Energy and financial evaluations CD tools from SCE's exhibit. SCE Pump Test program participated in the Inland Counties Water Association Vendor's Fair. Approximately 150 people picked up literature and engaged in various discussions and demonstrations. In addition, a presentation was given to the Association of Ventura County Water Agencies.

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6. **Hard to Reach**

SCE will continue in its efforts to provide needed services and information to geographically hard-to-reach customers. Due to the industry that this program services, many of the customers are by definition hard-to-reach customers and their businesses are located in outlying, rural locations.

In addition, SCE is continuing its policy not to retest pumps in consecutive years. The effect of these efforts will attempt to increase the awareness and participation of these specific customers and those customers who have not had their pumps tested in the last 3 years.

**IV. Program Accomplishments**

Based on customer satisfaction surveys received to date, SCE's program is achieving a 93.64% overall satisfaction score. Overall in 2003, customers have been continually satisfied with the Pump Test and Hydraulic Services program as indicated by the overall satisfaction surveys.

**V. Program Challenges**

None

**VI. Customer Disputes**

None

**VII. Compliance Items**

None

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Program Title: **Local Demonstration & Information Transfer**

**I. Program Overview**

The Local Crosscutting Demonstration and Information Transfer program is an information-only program that seeks to accelerate the introduction of energy efficient technologies, applications, and analytical tools that are not widely adopted in Southern California Edison's (SCE) service territory. The program's demonstration activities focus on near-commercial energy efficient applications with significant market potential and commercial energy efficient applications with low market penetration using Emerging Technology (ET) Application Assessment projects. The ET application assessments may be conducted at either customer sites or in controlled environments. The assessments provide design, performance, and verification of novel energy efficient systems, and help to reduce market barriers. The projects measure, verify, analyze, and document the potential energy savings and demand reduction of specific applications in different market segments. Information Transfer efforts disseminate an assessment's results, and are customized to the targeted markets.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$500,000
Preliminary Program Expenditures (includes program commitments)*	\$472,095

\*Expenditures to date (including program commitments) = [actual + committed thru December 31, 2003]

2. Total net demand reduction and energy savings:

Based upon the California Public Utilities Commission approved Energy Efficiency Policy Manual, this information program is not expected to provide energy savings targets.

3. Total number of customers served:

**Projected:** The program will initiate a limited number of customer site demonstration projects in 2003, since not all assessments require customer site testing and multiple assessments may be performed at a single customer site. Based on the program's performance goal of three ET application assessments, three customer site demonstrations may be anticipated.

**Actual:** Five customer site assessment projects were started during the fourth quarter. A total of six customer site assessments were initiated during 2003.



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4. Projected and actual number of units:  
Please refer to program activity tables in corresponding program workbook.
5. Total rebate (\$) paid:  
The program does not provide customer rebates.

**III. Program Implementation Status**

1. Status of program delivery  
The program surpassed its goal of three new assessment projects for the year, and initiated seven ET application assessment projects in 2003. The projects will continue into 2004.
2. Customer Enrollment  
The program does not use application forms to enlist customers in the program. Due to the nature of the program and the limited number of customer site demonstrations, customized agreements are negotiated with each customer for each project.
3. Workbook  
Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.
4. Training  
The program neither sponsored nor conducted any training during the course of the quarter.
5. Marketing  
The program did not engage in any marketing activities during the quarter. Several seminars and workshops will be conducted, as part of the program's information transfer activities, once the assessment projects are completed.
6. Hard-to-Reach  
The program does not have specific goals for the hard-to-reach market segments. In general, the information the program generates through its demonstration activities tends to benefit all customers. One of the aims of the program is to explore the extent of application a new technology has in various market segments, in an effort to characterize the widest possible deployment opportunities. Thus, the program will seek opportunities to host appropriate demonstration projects at hard-to-reach customer sites, such as ethnic, small commercial and residential customers.

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**IV. Program Accomplishments**

*Emerging Technology Application Assessments*

A total of seven ET application assessment projects were initiated during 2003.

During the fourth quarter, SCE committed and initiated five assessment projects:

- **Cold Storage Controls.** Food processing plants use refrigerated storage facilities to preserve foods for processing until shipped to market. The efficiency of the refrigeration system depends on many variables including the outside air temperature. This assessment project will use advanced controls to reduce refrigeration system operating hours during the day. The strategy allows the indoor temperature to float relying on the facility's and product's thermal mass during the hottest part of the day and to sub-cool the facility and product at other times. The lower ambient air temperatures for heat rejection should improve the refrigeration system's operating efficiency.
- **Silicon Based Dry Cleaning.** Silicone solvent based dry cleaning systems are an alternative to perchloroethylene (PERC) solvent based dry cleaning systems. This assessment project will document the demand and energy usage impacts of silicon based dry cleaning and compare it to other cleaning systems. The project is a partnership between Southern California Gas Co., the South Coast Air Quality Management District, Occidental College, and SCE.
- **Hydrocarbon Based Dry Cleaning.** Petroleum solvent based dry cleaning, i.e., "hydrocarbons," is the most widely used alternative to PERC based dry cleaning systems. Air quality regulations require that petroleum dry clean machines be equipped with solvent-recovering pollution control devices similar to those found on PERC equipment. This project will document the demand and energy usage impacts of hydrocarbon based dry cleaning systems and compare it to other cleaning systems. This project is a partnership between Southern California Gas Co., the South Coast Air Quality Management District, Occidental College, and SCE.
- **CO<sub>2</sub> Based Dry Cleaning.** Liquid CO<sub>2</sub> solvent dry cleaning, i.e., liquid entrained pressurized carbon dioxide gas, is a non-toxic, non-flammable alternative to PERC based dry cleaning. The assessment project will document the demand and energy usage impacts of CO<sub>2</sub> based dry cleaning systems and compare it to other cleaning systems. This project is a partnership between Southern California Gas Co., the South Coast Air Quality Management District, Occidental College, and SCE.

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- **Advanced Controls for Plastics Granulators.** This assessment project will investigate the potential demand and energy savings of different control systems for plastics granulator machines. Plastics granulators are specialized chopping and shredding machines used in a number of secondary plastics manufacturing processes like injection molding, blow molding, etc. The project will assess mesh, size, and on/off automated controls, and will document option costs and potential energy savings.

In addition, the following two assessments initiated during 2003 continue:

- **Ultra High Lime-Pellet Softening of Brine Concentrate Waste Streams.** This assessment project will produce a field study report for a site and estimate the potential savings for water and wastewater membrane plants within SCE's service territory for pellet softening ultra high lime (PS-UHL) processing of wastewater streams. During the quarter, membrane facilities treating potable and wastewater in the SCE service area were identified. A total of ninety facilities, including full-scale municipal reclamation plants, desalination plants, and brackish potable groundwater sources were identified. Available water quality, chemical, energy and equipment data were compiled for the sites.
- **Professional Wet Cleaning with High Spin Speed Water Extraction.** This assessment project will determine the demand and energy impacts of high-end Professional Wet Cleaning equipment at Black Tie Cleaners in Placentia. This project is a partnership between Southern California Gas Co., the South Coast Air Quality Management District, Occidental College, and SCE. During the quarter, the demand and energy usage data for the new professional wet cleaning system was collected. The energy savings analysis and the draft project report are underway.

**V. Program Challenges**

There were no specific program challenges during the fourth quarter.

**VI. Customer Disputes**

There were no customer disputes during the fourth quarter.

**VII. Compliance Items**

Based on Decision D.03-04-055, there is no California Public Utilities Commission regulatory compliance item directly related to this program.

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Program Title: **SCE Local Government Initiative**

**I. Program Overview**

Southern California Edison's Local Government Initiative (SCE-LGI) educates and informs community leaders, local government planners, building officials, builders, building owners, small business owners, and consumers about the economic benefits of energy efficiency in the areas of residential and nonresidential new construction, as well as small business, and residential retrofit and surveys. Designed with extensive input from Southern California local government building departments, the innovative programs offered through SCE-LGI are designed to help local governments build self-sustaining energy efficiency partnerships with their constituents.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$950,000
Preliminary Program Expenditures (includes program commitments)*	\$646,958

\*Expenditures to date = actual thru December 31, 2003. Program commitments not included.

2. Total net demand reduction and energy savings:

Based upon the California Public Utilities Commission's approved Energy Efficiency Policy Manual, this information program implementation plan is not expected to provide energy savings targets. Program goals are provided below in sections 5 and 6.

3. Total number of customers served:

	<b>New Jurisdictions</b>
<b>Target (12 Hard-to-Reach)</b>	16
<b>Actual</b>	18

Target per decision 03-04-055, Attachment 2, page 27.

Actual (including program commitments) = [actual + committed thru September 30, 2003]

4. Projected and actual number of units:

Please refer to program activity tables in corresponding program workbook.

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**III. Program Implementation Status**

During the fourth quarter of 2003, SCE-LGI was directly marketed to a total of 5 new local governments. Four of the jurisdictions pursued subsequently joined the program. Those cities included: Montclair, Oxnard, La Habra, and Rialto.

Additionally, the SCE-LGI maintained its extensive outreach efforts promoting SCE's nonresidential new construction local program CheckPoint, as well as Express Efficiency for small businesses, and residential energy efficiency programs like Multifamily Rebates, and residential rebates and surveys to its more than 61 participating jurisdictions.

1. Customer Enrollment

Two blank copies of the program enrollment forms will be sent to the Commission's Energy Division.

2. Workbook

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

3. Training

During the 4th quarter 30 jurisdictions' general staff were trained on CEEP, and its rules pertaining to duct testing. The primary focus of this training was to discuss and convey duct testing protocols for both CEC requirements as well as CEEP. Many builders have a perception that the duct testing protocols for CEEP exceed what is required for code. This training communicated to the building departments that additional inspections/procedures above and beyond the CEC's requirements do not exist. This has been a primary hurdle for builders wanting to participate in CEEP but feared potential "hassle."

4. Marketing

In effort to encourage participation in the program, SCE undertook the following activities:

- Held annual Advisory Group meeting in Fullerton in October 2003. Focus of the meeting was program improvements, and increased builder participation in the CEEP.
- CheckPoint featured in the faxed newsletter to all LGI participants.

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- The “Energy Efficiency Resource Center” banner was created for all participating jurisdictions to utilize on their cities’ web pages as a direct link to SCE’s energy efficiency webpage.
- SCE continued to customize program applications/literature (CheckPoint, CEEP) with the participating jurisdictions’ logos.
- The design of Energy Efficiency Resource Center kiosks were completed this quarter and presented to the Advisory Group at the annual meeting in October. Three sample kiosks were created for the cities of Santa Clarita, Thousand Oaks, and Corona. The cities intend to strategically place the kiosks within a high-traffic lobby area. The kiosks will hold a broad range of program literature and applications.
- Technical assistance for the city of Fillmore, a new jurisdiction in 2003, was provided technical assistance by aiding in the creation of a “Homeowners Manual” which is available at the Building Department counter, and is provided as a service to City residents to help them with retrofits and new construction methods. As a service to the City of Fillmore, the LGI team assembled for them energy efficiency information from a dozen national organizations, and tailored to meet Fillmore’s unique geographic characteristics.
- Bi-monthly two-page fax update to participating jurisdictions.

5. Hard to Reach

Out of the 18 new jurisdictions in the LGI program, 12 of them have at least 30 percent of the city zip codes within the HTR. These cities include: Arcadia, , Chino, Diamond Bar, Highland, La Habra, Loma Linda, Montclair, Orange, Redondo Beach, Rialto, Signal Hill, Tustin.

**IV. Program Accomplishments**

- The LGI exceeded its goal of 16 new jurisdictions by obtaining 18 new participants. This brings the total number of participating jurisdictions in SCE’s territory up to 61 since 2001.
- Conducted CEEP and related energy code training for the following 30 jurisdictions: Victorville, Palm Springs, Temecula, Moreno Valley, Ontario, Upland, Garden Grove, Thousand Oaks, Lancaster, Manhattan Beach, San Jacinto, Indian Wells, Tustin, Camarillo, Santa Clarita, Palmdale, Huntington Beach, Loma Linda, Rancho Cucamonga, Norco, Banning, Hesperia, Fontana, Corona, Orange County, Fullerton, Redlands, Highland, Yorba Linda, and San Bernardino.

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**V. Program Challenges**

Increasing builder participation in CEEP has been the program's biggest challenge thus far. To mitigate this problem, outreach and training about the builder procedures for CEEP was conducted for 30 jurisdictions to better train the building departments' general staff on the requirements of CEEP builders and to put to rest concerns the builders have about increased "red tape." Additionally, SCE is running a series of CEEP advertisements in two large builder trade magazines (California Builder and So. California Builder) to promote those participating jurisdictions to the builders constructing new homes in the respective jurisdictions.

**VI. Customer Disputes**

None

**VII. Compliance Items**

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

**Decision 03-04-055, Ordering Paragraph 3 states:**

*"No party shall delay program commencement or preparation pending submission of or Commission action on these plans."*

Response:

Program commencement and preparation were not delayed pending submission of or Commission action on these plans.

**Decision 03-04-055, Attachment 2, page 27 states:**

*"SCE proposes to target 16 new jurisdictions for 2003 with a high priority placed on those jurisdictions with notable building activity and/or containing zip codes in the hard-to-reach target areas... We hold SCE to its target of 16 new local jurisdictions added to the program in 2003, 12 of which are in hard-to-reach areas."*

Response:

SCE will pursue the goal of securing participation from 12 new jurisdictions where at least 30 percent of the zip codes within the city are in the HTR category.



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

**I. Program Overview**

This local program assists in the process of revising California's energy-related codes and standards in order to bring about cost-effective that will benefit California as a whole. This program supports the California Energy Commission's (CEC) 2003/2005 standard revision process for both California Title 20 and Title 24.

**II. Program Summary**

1. Total program budget

<b>2003</b>	<b>Amount</b>
Authorized Budget	\$66,700
Preliminary Program Expenditures (includes program commitments)*	\$65,483

\*Expenditures to date = actual thru December 31, 2003. Program commitments not included.

2. Total net demand reduction and energy savings:

Not applicable for this information program.

3. Total number of customers served:

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

4. Projected and actual number of units:

Please refer to program activity tables in corresponding program workbook.

5. Total rebate (\$) paid:

Not applicable for this information program.

**III. Program Implementation Status**

1. Status of program delivery

Staff is pursuing new Codes and Standards training opportunities. Two additional training seminars were conducted in the 4<sup>th</sup> quarter.

2. Customer Enrollment

Attendance at the seminars was good.

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3. **Workbook**  
Please refer to the informational tables shown in the corresponding program workbook for details on program expenditures and activities.
4. **Training**  
The program neither conducted training as described herein and in the workbook.
5. **Marketing**  
The program did not engage in any marketing activities during the quarter.
6. **Hard to Reach**  
Codes and Standards activities support hard-to-reach market segments by advocating cost effective code enhancements that promote energy efficiency for all building types and appliances included in the California standards.

**IV. Program Accomplishments**

The program staff is pursuing new Codes and Standards training opportunities.

**V. Program Challenges**

There were no specific program challenges during the first quarter.

**VI. Customer Disputes**

There were no customer disputes during the first quarter.

**VII. Compliance Items**

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

**Decision 03-04-055, Ordering Paragraph 3 states:**

*“No party shall delay program commencement or preparation pending submission of or Commission action on these plans.”*

Response:

Program commencement and preparation were not delayed pending submission of or Commission action on these plans.

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