

Southern California Edison

**2001 Energy Efficiency Programs
Third Quarter Report**

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Section 1: Executive Summary

Introduction

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

During the third quarter of 2001, SCE's energy efficiency programs achieved over 390 million kilowatt-hours (kWh) of net annualized energy savings and 115 MW of net demand reductions. In addition, the Summer Initiatives employed within SCE's service territory have achieved approximately 85 million kWh of annualized energy savings and 66 MW of demand reductions.

Residential

During the third quarter of 2001, SCE fully committed its residential rebate offerings under its Home Efficiency Rebate program. SCE continues its very successful refrigerator recycling program. As an added incentive to customers, SCE is offering a 5-pack of compact fluorescent bulbs to customers who are recycling their refrigerator or freezer. SCE has also revised the residential energy guide to provide "Quick Tips" on how to conserve energy and participate in energy efficiency programs. The Residential Contractor program for single-family residences is now focused on delivery duct test and repair through qualified residential contractors. In the promotion of the residential lighting program, SCE continues to use an upstream strategy by which customers are offered discounted energy efficient lighting products. As a result of these program activities, SCE has achieved approximately 108,000 MWh of net annualized energy savings and 47.8 MW of net demand reductions through the third quarter of 2001.

Nonresidential

To maximize energy and demand savings, SCE has made a number of significant programmatic changes to the nonresidential portfolio. One of the most significant changes is the expansion of customer eligibility to large customers under the Express Efficiency rebate program. SCE also continues its very successful Summer Initiative LED traffic signal rebate offering through Express Efficiency. Additionally through Express Efficiency, SCE has implemented "Blitz" initiatives promoting specific measures (e.g., window film) targeted to the smaller business customers. The Standard Performance Contract program requirements were also modified to simplify the application process. As a result of these program modifications, SCE has achieved approximately 257,000 MWh of net annualized energy savings and 57.2 MW of net demand reductions through the third quarter of 2001.

New Construction

In 2001, SCE has significantly increased funding in the residential and nonresidential new construction sector. In the residential new construction market, SCE continues to offer incentives to homebuilders to encourage them to build EnergyStar qualified homes. SCE has also implemented a manufacturer incentive program, which encourages air conditioning distributors to sell higher efficient units to builders at reduced prices. In the nonresidential market, SCE continues to offer the very successful Savings By Design program. Although the new construction activities have a much longer lead-time before energy savings are realized, these programs capture significant lost opportunities. Through the third quarter of 2001, these programs have achieved approximately 28,000 MWh of net annualized energy savings and 10.6 MW of net demand reductions.

Statewide and Crosscutting

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

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

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

Market Assessment and Evaluation

SCE completed an evaluation of its three school-based programs and submitted the report to the Energy Division. The study found that all three programs are highly regarded by participating students and teachers. Two of the three have methods in place to estimate energy savings achieved as a result of their programs, and the third is working on development of a method. The evaluator was able to make helpful, well-received suggestions for all three programs.

The Residential Market Share Tracking Project produced full-scale reports for the new construction, appliance and lighting sectors and developed a new summary trend report that provides key results in a colorful four- to eight-page format. New data for the first half of 2001 shows astounding growth in the market share of compact fluorescent lamps (CFLs) in California as compared to the rest of the nation. The California market share rose from a little over 1 percent of the market for screw-based lamps in 2000 to over 8 percent in second quarter 2001,

while the national share rose from under 1 percent to slightly over 1 percent by second wuarter 2001. These results are a testament to the joint achievements of the Flex Your Power advertising campaign that promoted use of CFLs and utility program efforts that made price-discounted CFLs available to customers in a far wider variety of types and locations than ever before.

Summer Initiative

In 2001, SCE continues to oversee various offerings under the Summer Initiative implemented during 2000. These Summer Initiatives include: Residential Refrigerator Recycling, Pool Efficiency Program, selective third party initiatives, LED Traffic Signal Rebate Program, Campus Energy Efficiency Project, Hard To Reach Program, Beat The Heat, and California Oil Producers Electric Cooperative. By the end of the third quarter 2001, the Summer Initiatives have installed or committed over 92,000 MWh of annualized energy savings and 66.5 MW of demand reduction.

Section 2: Residential Program Area

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

Residential Heating & Cooling Systems

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

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

Program Elements

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

Residential Audits

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

Program Element Summary

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

In light of the immediate need to reduce energy consumption by all customers and including residential, SCE experienced a high demand for energy surveys. Faced with this high demand, SCE is aggressively promoting its on-line survey to enable more customers to participate in the program.

Activities, Accomplishments, Market Progress, & Modifications

- To date, customers have completed over 51,000 mail-in, in-home, phone and online surveys representing 7,939 MWh of net annualized energy savings.
- The Mail-In survey has surpassed its energy savings goal. The success of the program is due to high customer response to direct solicitation topping 20%.
- The In-Home survey is on target to meet its goal. SERP funding was approved to complete 1,200 in-home surveys targeted to the Spanish-speaking hard-to-reach customer group. Mailers are printed in English/Spanish and will be sent out in October.
- SCE continues to aggressively promote the Online survey through radio ads in conjunction with the Home Efficiency Rebate program and other promotional activities and events.

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

Survey	Completed Audits
In-Home	4,980
Mail-In	36,389
Phone	1,761
Online	8,271

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

Authorized: \$1,400
 Revised: \$1,400

Residential - California Home Energy Efficiency Rating System Program

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

Program Element Summary

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

Activity, Accomplishments, Market Progress, & Modifications

- Performed 160 traditional CHEERS ratings; completed over 4,200 Energy Wizards (in support of the In-Home Audit program).
- For residential new construction, CHEERS certified and processed documentation for over 300 Energy Star Homes built in SCE territory.
- Developed training and educational materials for EGIA/RCP contractors. In addition, CHEERS facilitated this training to EGIA/RCP contractors.
- In support of the new residential energy standards created by AB 970, CHEERS continues to recruit, train, and certify individuals to perform third-party verifications for HVAC compliance options (tight ducts, TXV's, etc.), which were incorporated into the new standards effective June 1, 2001. Currently, CHEERS is the only state-certificated provider for this type of verification in residential new construction.

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

Authorized: \$300

Revised: \$300

Mass Market Information

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

Program Element Summary

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

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

Activity, Accomplishments Market Progress, & Modifications

- Distribution to community-based and trade/ethnic organizations continued through the third quarter via SCE's Public Affairs and Economic and Business Development organizations, and the Customer Call Center
- The new Energy Guide design has been widely distributed in the third quarter through traditional channels and newly introduced mass market information kiosks.
- Production of the mass market information kiosk was completed in the third quarter. Fifty kiosks have been installed in outlying, rural areas with the intent of reaching underserved customers with energy guides and energy efficiency program information in English and Spanish.

- Outreach through the third quarter included 167 visits by the ENERGY STAR® Mobile Education Unit (MEU) where customers learned about energy efficiency and were able to obtain copies of the Energy Guides and rebate program information. A total of 50,858 customer contacts were recorded through the third quarter.
- Residential Energy Guides distributed through the third quarter: 96,299 English; 6,576 Chinese; and 20,680 Spanish; 2,025 Korean; 2,020 Vietnamese.

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

Authorized: \$1,250

Revised: \$2,615*

*includes Consumer Affairs Agency's statewide media campaign.

Residential Lighting

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

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

Program Elements:

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

Residential Lighting

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

Program Element Summary

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

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

Activity, Accomplishments, Market Progress, & Modifications

Through SCE's efforts with lighting manufacturers to buy down the cost of energy-efficient lighting products, customers will receive a \$3 discount per unit off the purchase price of EnergyStar qualified compact fluorescent lamps (CFLs), and a \$10 discount per unit for a torchiere or hardwired indoor/outdoor lighting fixtures. The program is now complete with a total of 13 participating retailers.

Costco: received approximately 161,000 bulbs in 31 stores

Wal Mart: received approximately 4,000 bulbs and 2,000 torchieres in 43 stores
Sam's Club: received approximately 7,500 bulbs in 17 stores
Lowe's: received approximately 2,750 torchieres, 2,000 fixtures and 60,000 bulbs
in 14 stores
Long's Drugs: received approximately 10,000 bulbs in 50 stores
Home Depot: received approximately 50,000 torchieres, 14,000 fixtures and 79,000
bulbs in 63 stores
Albertson's: received approximately 10,000 bulbs in 171 stores
Cal Do-It: received approximately 9,000 bulbs in 8 stores
House2Home: received approximately 2,300 bulbs in 9 stores
Fisher Malibu: received approximately 750 bulbs in 2 stores
All American: received approximately 2,300 bulbs in 1 store
B&B: received approximately 650 bulbs in 1 store
Lamps Plus: received approximately 1,000 bulbs in 13 stores

The Torchiere program (incorporated into the Residential Lighting program) yielded Orchard Supply Hardware (OSH) as a retailer and delivered approximately 3,500 torchieres.

362,000 bulbs, 18,184 fixtures and 64,820 torchieres have moved into the retail market. This translates into net savings of 26.6 MW and 29,257 MWh.

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

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

Residential Appliances

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

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

Program Elements:

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

Residential Refrigerator Recycling

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

Program Element Summary

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

Activity, Accomplishments, Market Progress, & Modifications

The program has collected approximately 59,000 units, which represents more than 49,000 MWh of net energy savings and 8.3 MW of demand reduction. To date, about 11% of the customers have requested the new 5-pack CFL incentive offer (in lieu of the \$35 check). This has resulted in 200 MWh and 0.2 MW of additional energy savings and demand reduction, respectively. At the end of the third quarter, the program has exceeded volume for all of 2000 by approximately 15,000 units. By the end of 2001, the program will achieve the highest unit volume since it's inception in 1994.

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

Authorized: \$7,500

Revised: \$7,500

Residential Appliance

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

Program Element Summary

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

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

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

Activity, Accomplishments, Market Progress, & Modifications

- SCE has developed a request for proposal to allow manufacturers and retailers the flexibility in developing individualized in-store advertising and promotional activities tailored to their particular customer groups. It is expected that this added flexibility will provide greater promotion of ENERGY STAR[®] appliances.
- SCE has awarded to date co-op funds to three manufacturers with innovative co-op proposals ranging from adding matching manufacturer funds to provide retailer "spiffs," newspaper advertising, point of purchase displays, and buying down appliance delivery costs. Manufacturer co-op activity began in August 2001 and will continue through December 2001.
- SCE has signed agreements with and provided Point-of Purchase materials for over 30 appliance retailers.

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

Authorized: \$625

Revised: \$250

Residential Home Efficiency Rebate

Program Element Summary

With the increasing focus on providing "Californians with opportunities to control energy usage and reduce consumption" resulting in energy savings, the Home Efficiency Rebates (HER) program was redesigned for 2001. HER, modeled after the Express Efficiency Program,

provides financial incentives directly to consumers who purchase and install a number of energy-efficient appliances and products.

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

Measures in HER include:

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

Activity, Accomplishments, Market Progress, & Modifications

In 2001, the HER Program has received an unprecedented number of customer response due to the following:

- New measures and program offerings
- Successful marketing campaigns
- Media focus on and promotion of programs as a solution to rising utility bills and the energy crisis

In addition to refrigerators being amongst the most popular measures (over 17,000 refrigerator rebates have been paid through September), whole house fans have proven to be very popular. Over 1,600 have been paid.

The 2001 third quarter results included over 26,000 rebates and a total pay out of the incentive budget of \$3.0 million.

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

Authorized: \$1,440
Revised: \$4,003

RESIDENTIAL RETROFIT & RENOVATION

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

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

Program Elements:

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

Residential Contractor

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

Program Element Summary

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

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

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

Activity, Accomplishments, Market Progress, & Modifications

RCP-MF modifications to program applications, guidelines and procedures are underway. Some changes include: (a) the same project application will be used for calculated savings and measured savings approaches; (b) incentives will be paid in one installment under the alculated

savings approach; (c) dwelling unit and comprehensiveness bonuses will be eliminated, and (d) there will be a new incentive for compact fluorescent lamps installed in dwellings.

On September 4, 2001, and effective through the remainder of the year, RCP-MF implemented a payment-in-full, one payment schedule as an incentive to motivate contractors to expeditiously install approved Calculated Savings projects.

RCP-MF incentive budget of \$1.8 million is fully subscribed; RCP-SF incentives of \$1.2 million are 61% subscribed.

2001 Third Quarter Results:

- To date, single-family customer vouchers (actual and committed) total more than 16,120, and multi-family customer sites total 170. In combination (SF and MF), this represents approximately 12,600 MWh of net annualized energy savings and .8 MW of demand reduction.

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

RCP-SF

Authorized: \$5,939

Revised: \$2,669

RCP-MF

Authorized: \$2,439

Revised: \$2,148

Section 3: Nonresidential Program Area

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

Small Nonresidential Comprehensive Retrofit

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

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

Program Elements

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

Small Business Energy Survey

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

Program Element Summary

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

Activities, Accomplishment, Market Progress, & Modifications

- SCE has seen 429 online surveys completed. The online survey has taken over as primary Do-It-Yourself Energy Survey.

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

Authorized: \$350

Revised: \$335

Small/Medium Energy Management Services

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

Program Element Summary

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

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

Activities, Accomplishment, Market Progress, & Modifications

- The trend of increased requests for energy surveys has increased through the third quarter as expected. A total of 1441 requests for customer assistance have been made with 45% completed to date.

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

Authorized: \$350

Revised: \$350

Small Nonresidential Mass Market Information

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

Program Element Summary

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

SCE plans to implement a two-page “Quick Tips” energy guide that will include suggestions on how customers can conserve energy usage along with references to energy efficiency programs available to them. These revised energy guides will be available in English, Spanish, Korean, Chinese, and Vietnamese. SCE will pilot the use kiosks for the distribution of the energy guides along with other delivery methods currently employed by SCE. SCE will also publish energy

fact sheets on lighting, motors, HVAC, office equipment, and other energy efficiency information.

Activities, Accomplishment, Market Progress, & Modifications

- Continued distribution of the new Business Energy Guide for 2001 in English and Spanish.
- Completed printing and began distribution of the new Business Energy Guide into Chinese, Korean, and Vietnamese.
- Completed the printing of and initiated the distribution of the eight technical briefs in English. Took deliver of the Spanish and Vietnamese technical briefs. The Chinese and Korean technical briefs are being printed. These technical briefs inform the customer as to the performance of selected new technologies that can save money. The customer is then walked through a set of simple calculations to help him determine the payback period for implementing the technology.
- Completed distribution of 50 kiosks, targeting the hard-to-reach customer. These kiosks were placed in high traffic areas targeting both residential and business customers. The program was scaled down from 100 kiosk installations to 50 due to budget revisions.
- Completed printing and began distribution of the first “Success Story” which highlights the initiative taken by local governments to promote energy efficiency in their business communities by providing seed money for onsite energy surveys.
- Distributed a total of 94,500 copies (70,000 English, 2,500 Chinese, 1,000 Korean, 20,000 Spanish) of the business energy guide

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

Authorized: \$540

Revised: \$1,413*

*includes Consumer Affairs Agency’s statewide media campaign.

Agricultural/Pumping Services

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

Program Element Summary

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

Activities, Accomplishment, Market Progress, & Modifications

- Completed over 2,600 pump test and/or inspections.

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

Authorized: \$2,100

Revised: \$2,100

Nonresidential Express Efficiency

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

Program Element Summary

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

Activities, Accomplishment, Market Progress, & Modifications

- SCE’s Express Efficiency program for small-medium customers is fully committed. As of September 30, 2001 a total of 18,754 MWh of net energy savings been installed and 4.6 MW.
- SCE’s Express Efficiency program for large customers is fully committed representing approximately 118,000 MWh of net annualized energy savings and 28.5 MW of demand reduction.
- The 2001 LED Traffic Signal Rebate program is fully committed with 42 cities enrolled representing approximately 34,000 MWh of net annualized energy savings and 7.7 MW of demand reduction. Between SCE’s 2001 Express and 2000 Summer Initiative offerings, 90 cities have committed to installing energy efficient LED traffic signals during 2001 with an anticipated total of 78,800 MWh of annualized energy savings and 17.8 MW of demand reductions.

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

Small/Medium Express (including – LED Traffic Signals activities)

Authorized: \$6,433

Revised: \$6,871

Large Express

Authorized: \$0

Revised: \$6,312

Small/Medium Nonresidential Standard Performance Contract Program

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

Program Element Summary

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

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

Activities, Accomplishment, Market Progress, & Modifications

The program has achieved approximately 7,948 MWh of net annualized energy savings and 1.6 MW of demand reduction. When the total dollar value of all applications received reaches 110% of the authorized budget, additional applications will be placed on a wait list in the event that additional funding is authorized by the CPUC.

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

Authorized: \$0*
Revised: \$1,980

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

Large Nonresidential Comprehensive Retrofit

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

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

Program Elements

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

Large Standard Performance Contract

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

Program Element Summary

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

Activities, Accomplishment, Market Progress, & Modifications

The program is fully subscribed and as result has achieved over 28,000 MWh of net annualized energy savings and 4.8 MW of demand reduction. The dollar value of all applications we have received exceeds our available funding of \$5 million by about 92%, or \$4.6 million. The 2001 allocated funding is fully subscribed.

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

Authorized: \$15,750

Revised: \$5,027

Commercial Energy Efficiency Information Services

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

Program Element Summary

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

Activities, Accomplishment, Market Progress, & Modifications

- Nearly 5,340 commercial customers were contacted to promote energy efficiency programs such as SPC and Express Efficiency.

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

Authorized: \$350

Revised: \$575

Industrial Energy Efficiency Information Services

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

Program Element Summary

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

Activities, Accomplishment, Market Progress, & Modifications

- Nearly 1,900 industrial customers were contacted to promote energy efficiency programs such as SPC and Express Efficiency.

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

Authorized: \$350

Revised: \$575

Nonresidential HVAC Equipment Turnover

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

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

Program Elements

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

Nonresidential Upstream HVAC Pilot

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

Program Element Summary

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

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

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

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

Activities, Accomplishment, Market Progress, & Modifications

- The Quick Start Bonus promotion was completed the end of June. Contractors sent in 73 applications and 41 participating contractors.
- A follow-up promotion called the Summer Cool-off resulted in two more participating contractors as of September.

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

Authorized: \$250

Revised: \$70*

* - incentives offered through Express Efficiency.

Nonresidential Motor Turnover

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

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

Program Elements

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

Nonresidential Upstream Motors Pilot

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

Program Element Summary

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

Activities, Accomplishment, Market Progress, & Modifications

- Influenced 24 motor dealers to exceed SCE instituted sales quotas for 2001.
- Processed the sale of 946 motors to SCE nonresidential customers.

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

Authorized: \$550

Revised: \$330

Nonresidential Process

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

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

Program Elements

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

Nonresidential Renovation & Remodeling

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

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

Program Elements

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

Savings By Design

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

Program Element Summary

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

Activities, Accomplishment, Market Progress, & Modifications

As of September 30, 2001, the renovation and remodeling component of Savings By Design had achieved 10,108 MWh of net annualized energy savings and 2.2 MW of demand reduction, of these 6,817 MWh's and 1.5 MW's have been installed and are operating.

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

Authorized: \$1,700

Revised: \$1,150

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

Section 4: New Construction Programs

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

Residential New Construction

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

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

Program Elements

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

Residential New Construction

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

Program Element Summary

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

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

Activities, Accomplishment, Market Progress, & Modifications

The Residential New Construction program has committed 3,344 units to the whole house approach program strategy. Of these units, SCE expects approximately 150 - 200 units to be built this year. SCE expects to enroll 4,000 units by December 2001. The manufacturer buy-down program for high efficiency air conditioning has received reservations for 1,163 units. This program was created to both complement other program strategies as well as capture energy savings and demand reduction from those homes that have progressed in the construction phase. Additionally, SCE has been actively promoting and educating the building industry on the changes to the energy efficiency standards (Title 24), effective June 1, 2001. A total of 12 training sessions were held at various regional locations within SCE territory resulting in over 400 attendees from the building industry. These attendees included builders, architects, city building officials and inspectors, Title 24 consultants, and HVAC contractors. The training explains how the affects of Title 24 standards will impact builders, and how participating in SCE's residential new construction program not only assists builders in meeting the new standard, but exceed the code as well.

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

Authorized: \$3,750

Revised: \$3,100

Commercial New Construction

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

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

Program Elements

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

Savings By Design

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

Program Element Summary

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

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

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

Activities, Accomplishment, Market Progress, & Modifications

Savings by Design program continues to attract projects and as a result has achieved approximately 22,899 MWh of net annualized energy savings and 2.7 MW of demand reduction. Also, as part of the SBD program, information on the CheckPoint Rebate Program is currently available through five city building departments and discussions are in progress with at least five more cities. The program has been implemented using SCE service planners who make information and applications available to customers involved in new nonresidential construction sites.

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

Authorized: \$5,000
Revised: \$7,850

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

Energy Design Resources

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

Program Element Summary

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

Element Activities, Accomplishment, Market Progress, & Modifications

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

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

February 7	Loring Cruz Design & Consulting	Daylighting
February 8	Richard Meier & Partners	Daylighting
February 8	HOK, Santa Monica	Integrated Design
February 15	Dougherty & Dougherty	Integrated Design
March 28	Anshen & Allen Architects	Daylighting
March 29	Steven Ehrlich Architects	Daylighting
May 2	Coleman & Caskey	Integrated Energy Design
May 3	Dougherty & Dougherty	Energy Efficient Electric Lighting
May 4	Zimmer, Gunsel & Frasca	Daylighting
May 31	Perkins and will	Daylighting
June 1	Kajima Associates	Integrated Energy Design
6/13	Perkins & Will	Daylighting
8/8	Nadel Architects	Control Systems & Building Automation
8/29	MCG Architects	Integrated Energy Design
8/30	Spencer Hoskins	Daylighting

- On-going maintenance of the Energy Design Resources website.

The following table shows number of website visits:

January	3753
February	4100
March	4755
April	5378
May	5215
June	5420
July	4845
August	3141 *
September	2591

*Extrapolated due to change in server and incomplete data for the entire month

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

Authorized: \$1,200

Revised: \$100

Industrial/Agricultural New Construction

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

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

Program Elements

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

Savings By Design

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

Program Element Summary

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

Element Activities, Accomplishment, Market Progress, & Modifications

Program results are summarized under the Commercial New Construction program under the SBD program element.

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

See Savings By Design - Commercial

Codes & Standards Support and Local Government Initiatives

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

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

Program Elements:

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

New Construction Codes & Standards

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

Program Element Summary

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

Element Activities, Accomplishment, Market Progress, & Modifications

- SCE's Statewide Codes and Standards program manager participated in two statewide team meetings and a planning workshop for the 2005 Title 24 code revisions. Statewide team meeting agendas included updates on Codes and Standards Enhancement initiatives, particularly the Total Community Super Credit and the High Ambient Testing of HVAC Equipment. The CEC-hosted workshop on the upcoming 2005 code was an initial meeting to hear from various industry stakeholders on proposed revisions.
- SCE's CASE initiative on high ambient testing of HVAC equipment continued to progress. The instrumentation and data recording equipment has been installed. Testing is to be completed at SCE's Refrigeration & Thermal Test Center located in Irwindale. The final report is scheduled for completion by spring of 2002.

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

Authorized: \$1,670

Revised: \$700

Local Government Initiative

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

Program Element Summary

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

Activities, Accomplishment, Market Progress, & Modifications

Earlier this year, the Local Government Initiative implemented a Thermostatic Expansion Valve (TXV) incentive program, similar to a strategy offered as part of SCE's Residential New Construction program, and is targeted at HVAC distributors and installers. The program expects to install 1,150 TXV units by year-end. To date, this program has recorded 1,021 TXV units yielding net savings of 560 MWh and a reduction of .8 MW. An additional 19 MWh savings and .03 MW reduction were achieved from 21 Energy Star® Homes built through the LGC program. Finally, LGC continues to work with local jurisdictions on energy provisions and policies (street width, tree canopies, building orientation) that can be incorporated at the General Plan stage of development.

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

Authorized: \$400

Revised: \$385*

* - does not include any initiatives with individual cities.

Section 5: Statewide And Crosscutting Programs

Statewide Program Activity

Residential

Statewide Residential Energy Guide

Description of program and program element/strategy

- The Residential Energy Guide was developed to provide statewide consistency on energy efficiency information and awareness of appliance practices to each utility's residential customers. Pacific Gas and Electric Company, Southern California Edison, Southern California Gas, and San Diego Gas & Electric Company jointly participated in a coordinated effort to distribute Energy Guides to residential customers through a variety of delivery channels

Market participants and/or end uses

Participants: Residential customers.

End Uses: All residential end uses are targeted.

Accomplishments/milestones/market effects observed to date

- During First quarter 2001, utilities focused on distributing existing back stock of the Energy Guide.
- During Second and Third Quarters, utilities distributed utility-specific quick tip reference sheets providing customers with long and short-term solutions for energy savings.

Statewide Residential Lighting Program

Description of program and program element/strategy

- Pacific Gas and Electric Company, Southern California Edison, and San Diego Gas & Electric continue to coordinate efforts under the Statewide Residential Lighting program.
- In PY2001, lighting program strategies included manufacturer and consumer incentives, education and outreach to retailers and manufacturers, field services, salesperson training, paid advertising, and other consumer outreach and promotional activities.

Market participants and/or end uses

Participants: Residential Customers, Retailers of ENERGY STAR[®] Lighting Products, and Manufacturers of ENERGY STAR[®] Lighting Products

End Uses: ENERGY STAR[®] qualified lighting products

Accomplishments/milestones/market effects observed to date

- Year to date, multiple projects have been approved within the State promoting ENERGY STAR® qualified torchieres and compact fluorescent light bulbs to multiple retailers. Participating manufacturers include Lights of America, GE Lighting, Feit Electric, Maxlite, Good Earth, U.S. Par, Sunpark, TCP, Surya, Panasonic, Corso, Luxlite and Phillips. No additional co-op projects are anticipated this year.
- Retailers with 10 or more locations include Costco, Food Maxx, Long's Drugs, Orchard Supply, Sears, Wal-Mart and Yardbird.

Statewide Residential Appliance Program

Description of program and program element/strategy

- Pacific Gas and Electric Company, Southern California Edison, Southern California Gas Company and San Diego Gas & Electric continue to coordinate efforts under the Statewide Residential Appliance program.

Market participants and/or end uses

- Participants: Residential customers
- End Uses: ENERGY STAR® qualified appliances

Accomplishments/milestones/market effects observed to date

- Each utility currently operates and administers coordinated cooperative promotional incentives to manufacturers (co-op programs).
- Each utility offers consumer rebates on specific ENERGY STAR® qualified products.

Residential Energy Efficiency Contractor program (RCP)

Description of program and program element/strategy

- The 2000 Residential Contractor Program was originally designed to promote a self-sustaining contractor market for energy efficiency services in the residential retrofit, renovation, and remodeling market. Recent changes in the energy market have caused the program to shift some efforts from upstream to downstream in order to address a changing energy market.
- The program has two distinct elements: the Multifamily and Single Family Elements:
- The Multifamily Element applies to:
 - apartment dwelling units
 - common areas of apartments and condominium complexes, and
 - common areas of mobile home parks.
- The Single Family Element applies to:
 - single family homes
 - condominium dwelling units,
 - small attached apartments with up to four dwelling units (e.g., duplexes, triplexes, and

fourplexes), and

- mobile homes

Market participants and/or end uses

- Participants: Residential customers
- End Uses: Various residential applications

Accomplishments/milestones/market effects observed to date

- Pacific Gas & Electric, Southern California Edison, Southern California Gas, SMUD, LADWP and San Diego Gas & Electric reached agreement on three tiers for high efficiency central air conditioner and heat pump specifications for PY 2002 rebate programs. The desire is to use ENERGY STAR® as the base level, and the California utilities support a 13 SEER, 11 EER with TXV. The utilities are also discussing rebate amounts for air conditioning equipment to maintain as much consistency as possible in rebate levels on a statewide basis.
- Representatives from each of the major utilities attended the National HVAC Meeting hosted by the Environmental Protection Agency (EPA) to communicate the California utilities' recommendations for ENERGY STAR® specifications for 2002. At the meeting, a presentation mutually developed and agreed upon by all the utilities was presented to the EPA and manufacturers in attendance. A number of states were represented at this meeting and it is anticipated that this will lead to more national similarity of programs. The utilities are continuing to hold conference calls to discuss future actions in anticipation of EPA's specifications for 2002.
- The utilities are also discussing rebate approaches for all energy efficiency measures pertaining to residential, commercial and new construction. Through these ongoing discussions, preliminary rebate ranges have been agreed upon for residential energy efficiency measures such as windows, attic and wall insulation, whole house fans and water heaters.

Nonresidential

Large Nonresidential Standard Performance Contract (LNSPC) Program

Description of program and program element/strategy

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

Market participants and/or end uses

Participants: Large commercial, industrial and agricultural customers (greater than 500 KW or 250,000 annual therms), Energy Efficiency Service Providers (EESPs), contractors, and engineering firms.

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

Accomplishments/milestones/market effects observed to date

- In 2001, there are two payment levels based on end use and verification plan. The Calculated Savings Option (CSO) eliminates field measurement (reference tables and engineering calculations are used). The Measured Savings Option (MSO) offers a higher incentive because field measurement is required to verify achieved energy savings.
- The CSO incentive for natural gas measures is \$1.00 per annual therm of savings. The CSO incentive for electric measures are as follows: lighting measures – 5.5¢ per KWH, HVAC and refrigeration measures – 18.0¢ per KWH, and other measures (e.g., motors, variable speed drives) - 9.0¢ per KWH. The incentive for summer on-peak KW savings is \$100 for lighting measures, \$225 for HVAC measures and \$150 for other measures.
- The MSO incentive for natural gas measures is \$1.10 per annual therm of savings. The MSO incentive for electric measures are as follows: lighting measures – 6.0¢ per KWH, HVAC and refrigeration measures – 20.0¢ per KWH, and other measures (motors, variable speed drives) - 10.0¢ per KWH. The incentives for summer on-peak KW savings are the same as the CSO incentive.
- PG&E and SCE committed their LNSPC funds in the second quarter. SDG&E committed their LNSPC funds in the third quarter. New projects are being placed on a wait list should additional funding become available.

Small Business Standard Performance Contract (SBSPC) Program

Description of program and program element/strategy

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

Market participants and/or end uses

Participants: Small and medium commercial, industrial, and agricultural customers with electric demand equal to or less than 500 KW or 250,000 annual therms.

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

Accomplishments/milestones/market effects observed to date

- In 2001, there are two payment levels based on end use and verification plan. The Calculated Savings Option (CSO) eliminates field measurement (reference tables are used). The Measured Savings Option (MSO) offers a higher incentive because field measurement is required to verify achieved energy savings.
- The CSO incentive for natural gas measures is \$1.10 per annual therm of savings. The CSO incentive for electric measures are as follows: lighting measures – 6.0¢ per KWH, HVAC and refrigeration measures – 20.0¢ per KWH, and other measures (e.g., motors, variable speed drives) - 10.0¢ per KWH. The incentive for summer on-peak KW savings is \$125 for lighting measures, \$250 for HVAC measures and \$175 for other measures.
- The MSO incentive for natural gas measures is \$1.20 per annual therm of savings. The MSO incentive for electric measures are as follows: lighting measures – 7.0¢ per KWH, HVAC and refrigeration measures – 22.5¢ per KWH, and other measures (motors, variable speed drives) - 11.0¢ per KWH. The incentives for summer on-peak KW savings are the same as the CSO incentive.
- PG&E, SCE and SDG&E committed their SBSPC funds in the second quarter. New projects are being placed on a wait list should additional funding become available.

Express Efficiency Program

Description of program and program element/strategy

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

Market participants and/or end uses

Participants: Small and medium commercial, industrial, and agricultural customers (equal to or less than 500 KW or 250,000 annual therms).

End Uses: Heating, ventilation, air-conditioning, refrigeration, lighting, water heating, and other building-type-specific end uses including agricultural.

Accomplishments/milestones/market effects observed to date

- In 2001, several new measures were added to the program. These measures (refrigeration, agricultural and additional gas measures) will help with the outreach to specific end use customers.
- New technologies will be evaluated and possibly demonstrated, and where appropriate, added to the Express Efficiency program.
- PG&E committed their Express Efficiency funds in the third quarter. SCE, So Cal Gas and SDG&E expect to commit all funds before year-end.

Statewide Business Energy Guide
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Description of program and program element/strategy

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

Market participants and/or end uses

Participants: Small and medium commercial, industrial, and agricultural customers (equal to or less than 500 KW or 250,000 annual therms).

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

Accomplishments/milestones/market effects observed to date

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

Emerging Technologies

Description of program and program element/strategy

- Emerging Technologies activities focus on demonstrating energy efficiency options not

widely adopted by various market actors.

- Program makes detailed designs of efficiency options and their performance information widely available.
- The Emerging Technologies Coordinating Council (ETCC) was established to seek opportunities to coordinate efforts between each of the utilities emerging technologies programs as well as the CEC's PIER program.

Market participants and/or end uses

Participants: All customers

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

Accomplishments/milestones/market effects observed to date

- The utilities and the CEC continue discussions on emerging technologies through the Emerging Technologies Coordinating Council. On June 21st, the utilities participated in a conference call to discuss the status of emerging technologies. This was the third meeting of the utilities and the CEC in 2001 to discuss emerging technologies this year.
- The utilities continue to work with individual customers to develop showcase emerging technologies projects in their service territories.

Energy Centers

Description of program and program element/strategy

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

Market participants and/or end uses

Participants: All customers

End Uses: All end uses

Accomplishments/milestones/market effects observed to date

- **Seminar/Program Coordination:** The utilities continue to coordinate seminars as appropriate. The centers recognize that, through regional collaboration, the opportunity

exists to develop a more comprehensive set of energy efficiency conferences/seminars that would reflect the expertise and experience from a diverse group of contributors statewide. The following is a list of classes held through the third quarter of 2001:

CLASS	Location	Date
Designing an Energy Efficient Restaurant	SoCalGas ERC	2/22/2001
Design Strategies for High Performance Glass	SoCalGas ERC	4/4/2001
Operating an Energy Efficient Restaurant	SCE CTAC	4/26/2001
Lighting and Day lighting for Architects and Designers	SoCalGas ERC	5/17/2001
Designing High Performance Healthcare Facilities and Labs	SoCalGas ERC	7/31/2001
Designing Sustainable Libraries	SoCalGas ERC	9/11/2001
Notebook of a Site Survey Engineer	SCE CTAC	9/13/2001
Lighting and Daylighting for Architects and Designers	SCE CTAC	9/13/2001
High Performance Schools	SCE AGTAC	9/18/2001
Designing High Performance Healthcare Facilities and Labs	SCE CTAC	9/20/2001
Integrated Building Design	SCE AGTAC	9/25/2001

Four additional classes are schedule for the fourth quarter of 2001.

- Web-Based Energy Efficiency Library:** The Energy Centers envisioned this as a centralized and comprehensive online information library that could serve as an electronic information hub on all aspects of energy efficiency. Through a collaborative effort, an independent contractor was hired to construct a site named "energyefficiencycenter.com." The site, which was implemented on April 17, 2000, provides users with links to the energy centers as well as links to a number of associations, organizations, and government agencies where information on energy efficiency can be found. Further enhancements to the site were put on hold pending decisions regarding a more comprehensive statewide web site for EE activity and information.
- Partnership Program with Third Parties and/or State Agencies:** Each center has used their local relationships to develop partnerships to enhance their local offerings.

New Construction

Savings By Design (SBD)

Description of program and program element/strategy

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

Market participants and/or end uses

Participants: Primary decision makers in new construction and major renovation and remodeling projects: Program components address building owners, architects, engineers, contractors, builders, developers, energy consultants, and facilities personnel in all non-residential new construction projects. Equipment manufacturers and vendors will also be influenced as primary market actors increase demand for high efficiency building components. School districts will be specifically targeted as a hard-to-reach market for PY2001. For the purposes of this program element, eligible projects are defined as facilities where the building is still in the design stage of the project and include:

- “ground-up” facilities that are being newly constructed in utility’s territory
- permanent facility additions that add square footage to an existing structure
- “gut-rehabilitation” of appropriate nonresidential facilities within the utility’s service territory
- first-time and broad-scope tenant improvements to facilities involved with a change of tenant or occupancy
- facility remodels involving replacement of at least half of one or more building energy systems

End Uses: All energy-consuming systems supporting or housed within a new facility.

Accomplishments/milestones/market effects observed to date

- The 2001 program was fully revised to accommodate AB970 mandated Title 24 changes and incorporated the therm goal.
- Cooperative display and presentation at the American Institute of Architects California Council Design Conference held in Monterey, California. Over 700 architects from across California were in attendance. More than 100 attended the session presented by Savings By

Design dedicated to daylighting strategies entitled “Building as Luminaire”. Realized a substantial upswing in program interest among design teams and owners.

- Statewide sponsorship of the Energy Efficiency Integration Awards, in cooperation with The American Institute of Architects, California council. Out of 15 entrants, four buildings were selected to be recognized for their superlative design, environmental sensitivity and innovative energy efficiency.

Energy Design Resources Program

Description of program and program element/strategy

- Provides an integrated package of design tools and information resources that promote the design and construction of high-performance buildings.
- Utilizes a website to offer additional interactive resources and provide downloadable tools.
- Complements the integrated design strategies of the Savings By Design program and generates project leads for the SBD program.
- Provides validation of and peer recognition for designers and developers of exemplary projects that successfully incorporate principles of energy efficient design.

Market participants and/or end uses

Participants: The program targets two primary market actor groups within the new construction industry:

- Designers (architects, engineers, lighting designers, energy consultants) and developers, including students of these disciplines, who establish the characteristics of new building projects through design and construction
- Decision-makers who set the programmatic requirements for new building projects and can create a demand for energy efficiency facilities and design expertise

End Uses: All energy-consuming systems supporting or housed within a new facility.

Accomplishments/milestones/market effects observed to date

- Expanding the EDR website to include on-line learning for such topics as lighting, controls, luminaires, and other new technologies.
- Continuing an electronic newsletter that addresses energy efficiency and high performance technologies as well as recognizing individual project performers. Newsletter is distributed to all those registered on the statewide EDR website.
- Printing for the second edition of the EDR binder was completed in the second quarter. The binder includes 14 new Design Briefs, an in-depth integrated design case study, a Building Commissioning Manual, and an international daylighting research report.

Codes & Standards Program

Description of program and program element/strategy

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

Market participants and/or end uses

Participants:

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

Accomplishments/milestones/market effects observed to date

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

Crosscutting Program Activity

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

Emerging Technologies

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

Program Element Summary

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

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

Activities, Accomplishment, Market Progress, & Modifications:

- Signed a showcase agreement with the Los Angeles Unified School District to demonstrate the integrated design approach to optimize the energy savings in the new school complex in the Los Angeles County.
- Conducted a conference call among the utilities and CEC PIER program manager to coordinate the emerging technologies program under the ETCC.
- Completed the monitoring phase of the high volume low speed fan system in a dairy farm for cooling dairy cows in order improve the milk production.
- Signed showcase agreements with Denny's and Taco Bell restaurants to improve the building energy usage and food service equipment.
- Evaluating the potential energy savings in an IN-and-Out Burger restaurant through wave form power factor correction.
- Testing the performance of a continuous dimming control system for an HID lighting system at the Coastal Pacific Food Distribution Company.
- Providing technical support to Tricon Corporation for the development of two new energy efficient restaurant designs

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

Authorized: \$4,000

Revised: \$1,135*

* includes Codes and Standards activities.

Energy Centers - CTAC, AGTAC

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

Program Element Summary

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

Customer Technology Application Center (CTAC) -

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

The Agricultural Technology Application Center (AGTAC) -

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

Activities, Accomplishment, Market Progress, & Modifications:

Customer Technology Application Center (CTAC) –

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

	2000 ACTUAL	2001 GOAL	YTD
Seminar Attendance	1,019	1,158	2,217
Joint Utility Classes	3	6	6

- No further studies regarding CTAC feasibility or market impacts will be conducted.

The Agricultural Technology Application Center (AGTAC) –

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

	2000 ACTUAL	2001 GOAL	YTD
Seminar Attendance	679	747	908
Joint Utility Classes	0	2	4

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

CTAC

Authorized: \$2,135

Revised: \$2,135

AGTAC

Authorized: \$634

Revised: \$688

Third Party Initiatives

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

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

Element Activity, Accomplishments, Market Progress, & Modifications:

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

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

SCE's experience with the Summer Initiative and the 2001 TPI Programs has demonstrated that the Third Party Program is better suited to testing a few innovative and experimental program concepts than to providing a balanced and integrated program portfolio and achieving near-term energy savings goals. Proposed projects in these last two rounds have been either high-cost alternatives to utility rebate and SPC programs or innovative outreach programs with low near-term energy savings.

SCE has awarded ten new purchase orders and is extending four previous ones for this program. SCE has verified that all vendors have begun work. SCE is concerned about performance and will continue to closely monitor progress. It is too early to tell whether the projects will meet their stated goals. Total projected expenditure on 2001 TPIs is \$6.4 million, as required by the Commission.

The following are the 2001 TPI results through June 30, 2001:

- 450,000 kWh energy savings and 0.2 MW peak demand reduction achieved.
- \$4,911,000 committed to newly selected TPI projects.
- \$1,244,000 allocated to extending previously selected TPI projects.
- \$244,000 allocated to administrative costs for all TPI projects.

The current PY2001 TPI projects are as follows:

1. Residential Retrofit Projects

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

2. Nonresidential Retrofit Projects

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

3. New Construction Projects

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

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

Authorized: \$4,000

Revised: \$6,390

Section 6: Program Summary Tables

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

Program	2000 Recorded Expenses	2001 Authorized Budget ^[1]	2001 Revised Budget ^[2]	YTD		2001 Total Actual + Committed
				Actual 09/30/2001	Commitments 09/30/2001	
Residential Programs						
Heating and Cooling Systems						
Residential Audits	0.928	0.475	0.475	0.301	0.047	0.348
Local Government Initiative	-	0.200	0.200	0.034	0.166	0.200
Res EE Procurement Program (REEPP)	0.080	0.050	-	-	-	-
Calif Home Energy Eff Rating System (CHEERS)	0.100	0.080	0.080	0.023	0.023	0.045
Mass Market Information	0.042	0.313	0.615	0.430	0.185	0.615
Emerging Technologies	0.500	0.300	0.135	0.013	0.122	0.135
Energy Centers - CTAC/AGTAC	0.071	0.172	0.172	0.060	0.112	0.172
TPI Administration/Solicitation Process	0.250	0.400	0.170	0.038	0.132	0.170
General Support Activities ^[3]	0.068	0.073	0.069	0.021	0.048	0.069
Sub Total	2.038	2.062	1.916	0.919	0.835	1.754
Residential Lighting						
Residential Audits	0.646	0.260	0.260	0.163	0.024	0.187
Local Government Initiative	-	0.300	0.300	0.051	0.249	0.300
Res EE Procurement Program (REEPP)	0.225	0.100	-	-	-	-
Calif Home Energy Eff Rating System (CHEERS)	0.100	0.080	0.080	0.023	0.023	0.045
Mass Market Information	0.042	0.313	0.594	0.409	0.185	0.594
Energy Centers - CTAC/AGTAC	0.140	0.144	0.144	0.053	0.091	0.144
TPI Administration/Solicitation Process	0.250	0.400	0.873	0.194	0.679	0.873
Retail Initiative Lighting (Statewide)	2.839	2.450	3.200	1.689	1.925	3.614
Residential Contractor (Statewide)	0.600	-	-	-	-	-
General Support Activities ^[3]	0.104	0.147	0.203	0.061	0.142	0.203
Sub Total	4.945	4.194	5.654	2.642	3.319	5.961
Residential Appliances						
Residential Audits	0.386	0.215	0.215	0.138	0.023	0.161
Local Government Initiative	-	0.200	0.200	0.034	0.166	0.200
Res EE Procurement Program (REEPP)	0.480	0.300	-	-	-	-
Calif Home Energy Eff Rating System (CHEERS)	0.045	0.080	0.080	0.023	0.023	0.045
Mass Market Information	0.042	0.313	0.855	0.668	0.187	0.855
Energy Centers - CTAC/AGTAC	0.105	0.103	0.103	0.036	0.067	0.103
TPI Administration/Solicitation Process	0.250	0.400	0.560	0.125	0.435	0.560
Residential Spare Refrigerator Recycling	7.130	7.500	7.500	6.520	0.765	7.285
Residential Appliance (D)	2.795	1.440	4.003	3.593	0.417	4.010
Residential Appliance (U)	3.649	0.625	0.250	0.158	0.092	0.250
General Support Activities ^[3]	0.484	0.407	0.513	0.154	0.360	0.513
Sub Total	15.366	11.583	14.279	11.447	2.535	13.981
Residential Retrofit & Renovation						
Residential Audits	0.860	0.750	0.750	0.472	0.071	0.544
Local Government Initiative	-	0.200	0.200	0.034	0.166	0.200
Residential Contractor	5.041	8.378	4.817	1.806	2.630	4.436
Res EE Procurement Program (REEPP)	0.080	0.050	-	-	-	-
Calif Home Energy Eff Rating System (CHEERS)	0.075	0.060	0.060	0.017	0.017	0.034
Mass Market Information (Statewide)	0.042	0.313	0.553	0.368	0.185	0.553
Emerging Technologies	0.200	0.480	-	-	-	-
Energy Centers - CTAC/AGTAC	0.101	0.103	0.103	0.037	0.066	0.103
TPI Administration/Solicitation Process	0.253	0.400	0.400	0.089	0.311	0.400
Retail Initiative Window/Frame System Labeling	0.703	-	-	-	-	-
HVAC Diagnostic Program (Check-Me)	0.121	-	-	-	-	-
General Support Activities ^[3]	0.182	0.391	0.257	0.077	0.180	0.257
Sub Total	7.659	11.125	7.139	2.900	3.626	6.525
Residential Subtotal	\$ 30.008	\$ 28.964	\$ 28.987	\$ 17.907	\$ 10.314	\$ 28.221

^[1] 2001 Authorized Budget represents SCE's 2001 Energy Efficiency Budget as filed on November 15, 2000.

^[2] 2001 Revised Budget includes fundshifts directed as part of D. 01-01-060 (OPNs 3b-c, 12) and fundshifts made by SCE as part of the revised program plans for 2001.

^[3] Budget/recorded includes General Support Activities.

^[4] Small Business Rental Upgrade Program Budget was shifted into the Small SPC Program.

Program	2000 Year-end Actual + Committed	2001 Proposed Budget ^[1]	2001 Proposed Budget ^[2]	YTD		2000 Year-end Actual + Committed
				Actual 09/30/2001	Commitments 09/30/2001	
Nonresidential Programs						
Large Nonresidential Comprehensive Retrofit						
Emerging Technologies	0.400	0.200	-	-	-	-
Mass Market Information	-	-	0.170	0.168	-	0.168
Energy Centers - CTAC/AGTAC	0.496	0.513	0.513	0.267	0.246	0.513
Agricultural/Pumping Services	1.075	1.058	1.058	0.727	0.331	1.058
Nonresidential SPC	9.162	4.475	1.221	0.146	1.124	1.269
Express Efficiency (Large)	-	-	2.250	0.627	1.679	2.306
Large Commercial Informational Services	0.150	0.066	0.141	0.101	0.040	0.141
Large Industrial Informational Services	0.150	0.070	0.120	0.086	0.034	0.120
TPI Administration/Solicitation Process	-	-	-	-	-	-
General Support Activities ^[3]	0.498	0.268	0.239	0.072	0.168	0.239
Sub Total	11.931	6.650	5.712	2.194	3.621	5.815
Small Nonresidential Comprehensive Retrofit						
Mass Market Information (Statewide)	0.150	0.540	1.028	0.840	0.195	1.036
Emerging Technologies	0.350	0.200	0.300	0.088	0.212	0.300
Energy Centers - CTAC/AGTAC	0.332	0.333	0.333	0.175	0.158	0.333
TPI Administration/Solicitation Process	0.442	0.750	1.910	0.732	1.178	1.910
Small Business Survey & Services	1.103	0.700	0.683	0.404	0.278	0.683
Small SPC (Statewide) ^[4]	2.627	2.500	1.943	0.373	1.540	1.913
Agricultural/Pumping Services	0.499	0.536	0.536	0.369	0.167	0.536
Express Efficiency (Sm/Med)	3.893	6.433	8.678	3.356	5.288	8.644
Local Government Initiative	-	0.300	0.300	0.400	(0.100)	0.300
Small Business Space Rental Upgrade	-	0.500	-	-	-	-
General Support Activities ^[3]	0.241	0.466	0.586	0.175	0.411	0.586
Sub Total	9.637	13.258	16.297	6.913	9.328	16.241
Nonresidential HVAC Turnover						
Emerging Technologies	0.200	0.100	-	-	-	-
Mass Market Information	-	-	0.050	0.049	-	0.049
Energy Centers - CTAC/AGTAC	0.187	0.290	0.290	0.150	0.140	0.290
TPI Administration/Solicitation Process	-	0.250	0.811	0.311	0.500	0.811
Express Efficiency - Upstream HVAC	0.863	0.250	0.070	0.053	0.017	0.070
Express Efficiency (Sm/Med)	-	-	0.060	0.033	0.024	0.057
Express Efficiency (Large)	-	-	0.995	0.277	0.742	1.020
Nonresidential SPC	4.787	4.800	1.980	0.237	1.823	2.059
Large Commercial Informational Services	0.275	0.130	0.180	0.130	0.050	0.180
Large Industrial Informational Services	0.275	0.080	0.130	0.093	0.037	0.130
HVAC Commissioning Pilot Program	-	-	0.200	0.001	-	0.001
HVAC Diagnostic Program (Check-Me)	0.119	-	-	-	-	-
General Support Activities ^[3]	0.291	0.310	0.260	0.078	0.182	0.260
Sub Total	6.997	6.210	5.026	1.411	3.516	4.927
Motor Turnover						
Emerging Technologies	0.100	0.070	-	-	-	-
Mass Market Information	-	-	0.015	0.015	-	0.015
Energy Centers - CTAC/AGTAC	0.124	0.135	0.135	0.076	0.059	0.135
Agricultural/Pumping Services	0.222	0.262	0.262	0.182	0.080	0.262
Express Efficiency - Upstream Motors	0.795	0.500	0.370	0.327	0.043	0.370
Nonresidential SPC	0.609	1.200	0.540	0.065	0.497	0.562
Large Commercial Informational Services	0.050	0.034	0.084	0.060	0.024	0.084
Large Industrial Informational Services	0.050	0.020	0.070	0.050	0.020	0.070
Agricultural Energy Efficiency Incentives	0.273	-	-	-	-	-
TPI Administration/Solicitation Process	-	-	-	-	-	-
General Support Activities ^[3]	0.071	0.099	0.073	0.022	0.051	0.073
Sub Total	2.294	2.320	1.549	0.797	0.774	1.571

Nonresidential Process Overhaul						
Emerging Technologies	0.200	0.080	-	-	-	-
Mass Market Information	-	-	0.015	0.015	-	0.015
Energy Centers - CTAC/AGTAC	0.168	0.170	0.170	0.092	0.078	0.170
Agricultural/Pumping Services	0.259	0.244	0.244	0.169	0.075	0.244
Nonresidential SPC	3.287	1.200	0.800	0.096	0.736	0.832
Large Industrial Informational Services	0.335	0.080	0.105	0.075	0.030	0.105
TPI Administration/Solicitation Process	-	-	-	-	-	-
General Support Activities ⁽³⁾	0.181	0.123	0.078	0.023	0.055	0.078
Sub Total	4.431	1.897	1.412	0.470	0.974	1.444
Commercial Remodeling Renovation						
Emerging Technologies	0.825	0.900	-	-	-	-
Mass Market Information	-	-	0.066	0.065	-	0.065
Energy Centers - CTAC/AGTAC	0.472	0.485	0.485	0.252	0.233	0.485
Nonresidential SPC	1.218	1.575	1.486	0.178	1.368	1.546
Express Efficiency (Large)	-	-	1.200	0.334	0.895	1.230
Large Commercial Informational Services	0.250	0.120	0.170	0.122	0.048	0.170
Large Industrial Informational Services	-	0.100	0.150	0.107	0.043	0.150
Savings By Design	2.000	1.700	1.150	0.462	0.560	1.022
TPI Administration/Solicitation Process	-	-	-	-	-	-
General Support Activities ⁽³⁾	0.153	0.222	0.198	0.059	0.138	0.198
Sub Total	4.918	5.102	4.905	1.580	3.285	4.866
Nonresidential Subtotal	40.207	35.436	34.900	13.365	21.497	34.862

Program	2000 Year-end Actual + Committed	2001 Proposed Budget ^[1]	2001 Proposed Budget ^[2]	YTD		2000 Year-end Actual + Committed
				Actual 09/30/2001	Commitments 09/30/2001	
New Construction Programs						
Residential New Construction						
Emerging Technologies	0.200	0.170	-	0.006	-	0.006
Mass Market Information	-	0.030	0.355	0.355	-	0.355
Energy Centers - CTAC/AGTAC	0.128	0.136	0.136	0.060	0.076	0.136
TPI Administration/Solicitation Process	0.382	0.400	0.892	0.337	0.555	0.892
Residential New Construction	3.255	3.750	3.074	0.760	0.203	0.963
Local Government Initiatives	-	0.800	0.800	0.450	0.350	0.800
General Support Activities ^[3]	0.087	0.193	0.196	0.059	0.137	0.196
Sub Total	4.051	5.479	5.453	2.026	1.322	3.348
Commercial New Construction						
Emerging Technologies	0.725	0.600	-	-	-	-
Mass Market Information	-	-	0.077	0.077	-	0.077
Energy Centers - CTAC/AGTAC	0.077	0.108	0.108	0.059	0.049	0.108
TPI Administration/Solicitation Process	0.402	0.750	0.474	0.179	0.295	0.474
Savings By Design	2.827	4.500	7.076	1.496	2.220	3.716
Energy Design Resources	1.300	1.200	0.100	0.040	0.060	0.100
General Support Activities ^[3]	0.134	0.261	0.292	0.087	0.205	0.292
Sub Total	5.464	7.419	8.127	1.937	2.829	4.766
Industrial and Agricultural New Construction						
Emerging Technologies	0.200	0.200	-	-	-	-
Energy Centers - CTAC/AGTAC	0.060	0.084	0.084	0.045	0.039	0.084
Savings By Design (statewide)	0.500	0.800	0.800	0.169	0.251	0.420
Energy Efficiency Incentives	0.481	-	-	-	-	-
TPI Administration/Solicitation Process	-	-	-	-	-	-
General Support Activities ^[3]	0.097	0.040	0.033	0.010	0.023	0.033
Sub Total	1.338	1.124	0.917	0.224	0.313	0.537
New Construction Codes & Standards Support and Local Government Initiatives						
Emerging Technologies	0.700	0.700	0.700	0.067	0.633	0.700
Energy Centers - CTAC/AGTAC	0.033	0.047	0.047	0.025	0.022	0.047
TPI Administration/Solicitation Process	0.018	0.250	0.300	0.113	0.187	0.300
Local Government Initiatives	0.687	0.400	0.385	0.229	0.156	0.385
General Support Activities ^[3]	0.043	0.051	0.053	0.016	0.037	0.053
Sub Total	1.481	1.448	1.485	0.451	1.034	1.485
New Construction Subtotal	12.334	15.469	15.982	4.639	5.498	10.137
TOTALS	82.548	79.869	79.869	35.911	37.309	73.220

Table 6.2
Southern California Edison Company
Energy Efficiency Program Energy and Demand Reductions - YTD
PY2001
(\$ in millions)

Program	YTD		
	Energy (MWH)	Demand (MW)	Gas (Therms)
Residential Programs			
Heating and Cooling Systems			
Residential Audits	2,218	0.59	
Local Government Initiative	124	0.18	
Res EE Procurement Program (REEPP)			
Calif Home Energy Eff Rating System (CHEERS)	121	-	
Mass Market Information			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
General Support Activities ^[3]			
Sub Total	2,464	0.77	-
Residential Lighting			
Residential Audits	1,214	0.32	
Local Government Initiative	187	0.27	
Res EE Procurement Program (REEPP)			
Calif Home Energy Eff Rating System (CHEERS)	121	-	
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Retail Initiative Lighting (Statewide)	29,257	26.65	
General Support Activities ^[3]			
Sub Total	30,779	27.24	-
Residential Appliances			
Residential Audits	1,004	0.27	
Local Government Initiative	124	0.18	
Res EE Procurement Program (REEPP)			
Calif Home Energy Eff Rating System (CHEERS)	121	-	
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Residential Spare Refrigerator Recycling	49,191	8.28	
Residential Appliance (D)	7,914	9.21	
Residential Appliance (U)			
General Support Activities ^[3]			
Sub Total	58,355	17.94	-
Residential Retrofit & Renovation			
Residential Audits	3,503	0.93	
Local Government Initiative	124	0.18	
Residential Contractor	12,569	0.79	
Res EE Procurement Program (REEPP)			
Calif Home Energy Eff Rating System (CHEERS)	91	-	
Mass Market Information (Statewide)			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Retail Initiative Window/Frame System Labeling			
HVAC Diagnostic Program (Check-Me)			
General Support Activities ^[3]			
Sub Total	16,287	1.90	-
Residential Subtotal	107,885	47.85	-

Program	YTD		
	Energy (MWH)	Demand (MW)	Gas (Therms)
Nonresidential Programs			
Large Nonresidential Comprehensive Retrofit			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
Agricultural/Pumping Services	7,987	1.97	
Nonresidential SPC	5,783	0.98	
Express Efficiency (Large)	60,062	14.41	
Large Commercial Informational Services			
Large Industrial Informational Services			
TPI Administration/Solicitation Process			
General Support Activities ^[3]			
Sub Total	73,831	17.36	-
Small Nonresidential Comprehensive Retrofit			
Mass Market Information (Statewide)			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Small Business Survey & Services	100	0.01	
Small SPC (Statewide)	7,948	1.56	
Agricultural/Pumping Services	4,046	1.00	
Express Efficiency (Sm/Med)	74,939	16.17	
Local Government Initiative			
Small Business Space Rental Upgrade			
General Support Activities ^[3]			
Sub Total	87,033	18.74	-
Nonresidential HVAC Turnover			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Express Efficiency - Upstream HVAC			
Express Efficiency (Sm/Med)	-	-	
Express Efficiency (Large)	26,561	6.37	
Nonresidential SPC	9,381	1.58	
Large Commercial Informational Services			
Large Industrial Informational Services			
HVAC Commissioning Pilot Program			
HVAC Diagnostic Program (Check-Me)			
General Support Activities ^[3]			
Sub Total	35,942	7.96	-

Motor Turnover			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
Agricultural/Pumping Services	1,978	0.49	
Express Efficiency - Upstream Motors	708	0.14	
Nonresidential SPC	2,558	0.43	
Large Commercial Informational Services			
Large Industrial Informational Services			
Agricultural Energy Efficiency Incentives			
TPI Administration/Solicitation Process			
General Support Activities ^[3]			
Sub Total	5,244	1.07	-
Nonresidential Process Overhaul			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
Agricultural/Pumping Services	1,842	0.46	
Nonresidential SPC	3,790	0.64	
Large Industrial Informational Services			
TPI Administration/Solicitation Process			
General Support Activities ^[3]			
Sub Total	5,632	1.10	-
Commercial Remodeling Renovation			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
Nonresidential SPC	7,042	1.19	
Express Efficiency (Large)	32,033	7.69	
Large Commercial Informational Services			
Large Industrial Informational Services			
Savings By Design	10,108	2.15	
TPI Administration/Solicitation Process			
General Support Activities ^[3]			
Sub Total	49,183	11.03	-
Nonresidential Subtotal	256,865	57.25	-

Program	YTD		
	Energy (MWH)	Demand (MW)	Gas (Therms)
New Construction Programs			
Residential New Construction			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Residential New Construction	5,166	8.00	
Local Government Initiatives			
General Support Activities ^[3]			
Sub Total	5,166	8.00	-
Commercial New Construction			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Savings By Design	20,573	2.39	
Energy Design Resources			
General Support Activities ^[3]			
Sub Total	20,573	2.39	-
Industrial and Agricultural New Construction			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
Savings By Design (statewide)	2,326	0.27	
Energy Efficiency Incentives			
TPI Administration/Solicitation Process			
General Support Activities ^[3]			
Sub Total	2,326	0.27	-
New Construction Codes & Standards Support and Local Government Initiatives			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Local Government Initiatives			
General Support Activities ^[3]			
Sub Total	-	-	-
New Construction Subtotal	28,066	10.66	-
TOTALS	392,816	115.76	-

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

Program	PG&E					SoCal Gas					SoCal Edison					SDG&E					Statewide Total				
	Authorized Budget	Revised Budget	Actual	Commitments	Total	Authorized Budget	Revised Budget	Actual	Commitments	Total	Authorized Budget	Revised Budget	Actual	Commitments	Total	Authorized Budget	Revised Budget	Actual	Commitments	Total	Authorized Budget	Revised Budget	Actual	Commitments	Total
Residential Contractor Program	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Single Family RCP ³	9.28	9.28	6.11	3.22	9.32	4.77	4.22	1.43	1.71	3.14	5.94	2.67	1.28	0.64	1.91	4.28	3.15	3.13	0.02	3.15	24.27	19.32	11.94	5.59	17.53
Multi-Family RCP ⁴	4.39	3.91	0.37	3.10	3.47	1.10	1.10	0.07	2.16	2.23	2.44	2.15	0.53	1.99	2.52	1.92	2.06	2.22	0.25	2.48	9.84	9.22	3.19	7.51	10.70
Upstream Lighting Program	1.63	1.63	1.42	0.10	1.52	-	-	-	-	-	2.45	3.20	1.69	1.93	3.61	1.45	0.57	1.17	0.48	1.65	5.53	5.40	4.28	2.50	6.78
Upstream Appliance Program	10.90	10.90	10.97	1.80	12.77	0.51	0.51	0.73	-	0.73	0.63	0.25	0.16	0.09	0.25	0.33	0.08	0.04	0.03	0.07	12.36	11.74	11.89	1.92	13.82
Statewide Residential Energy Guide	0.08	0.08	0.03	-	0.03	0.13	0.08	-	-	-	0.77	0.77	0.11	0.66	0.77	0.07	0.03	0.03	0.01	0.04	1.05	0.96	0.17	0.66	0.83
Large SPC Program	13.21	14.02	1.94	14.44	16.39	-	-	-	-	-	15.75	6.03	0.72	5.55	6.27	4.00	5.74	0.92	4.81	5.74	32.96	25.78	3.58	24.80	28.39
Small SPC Program	1.00	3.53	2.63	1.31	3.94	-	-	-	-	-	-	1.94	0.37	1.54	1.91	0.81	1.39	0.66	0.72	1.39	1.81	6.85	3.66	3.57	7.23
Express Efficiency Program ¹	23.00	22.80	16.18	9.42	25.60	0.51	0.51	0.15	-	0.15	6.43	13.18	4.63	8.63	13.26	4.00	2.10	1.30	0.49	1.80	33.94	38.60	22.26	18.54	40.80
Statewide Business Energy Guide	-	-	-	-	-	0.13	0.08	-	-	-	0.40	0.32	0.12	0.20	0.32	0.05	0.03	0.00	-	0.00	0.58	0.42	0.12	0.20	0.32
Savings By Design Program ²	10.05	10.05	3.54	7.30	10.84	1.13	1.13	0.29	0.30	0.59	6.70	9.03	2.13	3.03	5.16	4.62	4.56	0.58	2.10	2.68	22.50	24.76	6.53	12.73	19.27
Energy Design Resources Program	1.99	1.99	0.65	0.98	1.63	-	-	-	-	-	1.20	0.10	0.04	0.06	0.10	0.53	0.41	0.20	0.12	0.32	3.71	2.50	0.89	1.16	2.05
Codes and Standards Support Effort	1.41	1.51	0.34	1.32	1.66	0.30	0.30	0.01	-	0.01	0.70	0.70	0.07	0.63	0.70	0.25	0.24	0.17	0.08	0.26	2.66	2.75	0.59	2.04	2.63
Emerging Technologies	0.10	0.08	0.00	0.08	0.08	2.52	1.73	1.44	-	1.44	3.30	0.44	0.11	0.33	0.44	0.60	0.10	0.02	0.06	0.08	6.52	2.35	1.57	0.47	2.04
Energy Centers	2.80	2.23	2.12	0.10	2.22	1.96	1.96	1.05	-	1.05	2.82	2.82	1.39	1.44	2.82	0.10	-	0.07	0.01	0.08	7.68	7.02	4.62	1.55	6.17
Statewide Program Total	79.83	82.00	46.29	43.17	89.46	13.06	11.62	5.15	4.18	9.32	49.53	43.59	13.33	26.71	40.05	23.00	20.45	10.53	9.20	19.73	165.42	157.66	75.30	83.25	158.55

¹ PG&E Express Efficiency is downstream only

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

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

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

TABLE 6.4
STATEWIDE AND CROSS-CUTTING PROGRAM ENERGY AND DEMAND NET REDUCTIONS - YTD
PY 2001

Program	PG&E			SoCal Gas			SoCal Edison			SDG&E			Statewide Total		
	Energy MWh	Demand MW	Gas Therms	Energy MWh	Demand MW	Gas Therms	Energy MWh	Demand MW	Gas Therms	Energy MWh	Demand MW	Gas Therms	Energy MWh	Demand MW	Gas Therms
Residential Contractor Program	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Single Family RCP ³	6,251	11.55	1,390,073	5,102	5.97	515,232	2,578	0.66	-	3,930	6.93	284,137	17,860	25.11	2,189,442
Multi-Family RCP ⁴	18,703	2.32	394,731	-	-	1,732,715	9,992	0.14	-	12,429	0.43	1,207,614	41,124	2.88	3,335,060
Upstream Lighting Program	7,129	0.88	-	-	-	-	29,257	26.65	-	-	0.48	-	36,386	28.01	-
Upstream Appliance Program	26,635	5.05	201,271	-	-	80,237	-	-	-	-	-	-	26,635	5.05	281,508
Statewide Residential Energy Guide	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Large SPC Program	36,515	5.14	3,546,226	-	-	-	28,554	4.82	-	17,588	3.06	196,789	82,657	13.02	3,743,015
Small SPC Program	5,488	1.53	98,461	-	-	-	7,948	1.56	-	7,502	1.61	53,153	20,939	4.70	151,614
Express Efficiency Program ¹	259,792	45.90	762,007	-	-	166,485	193,594	44.64	-	17,562	5.06	11	470,948	95.61	928,503
Statewide Business Energy Guide	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Savings By Design Program ²	27,209	13.38	537,063	3,300	0.50	15,000	33,007	4.81	-	19,204	3.37	417,678	82,720	22.06	969,741
Energy Design Resources Program	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Codes and Standards Support Effort	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Emerging Technologies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Energy Centers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Statewide Program Total	387,723	85.76	6,929,831	8,402	6.47	2,509,669	304,930	83.28	-	78,215	20.93	2,159,382	779,270	196.44	11,598,882

¹ PG&E Express Efficiency is downstream only

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

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

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

Section 7: Market Assessment & Evaluation Studies

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

Study Area	Project ID	Project Title	Project Description	Project Objective (or milestone addressed for utility-level studies)	Lead Utility	Contact (Project/Area Manager)	Budget	Project Status	Expected Date of Completed Report
<i>Statewide Studies PY 2000</i>									
NEW CONSTRUCTION	SW015	NRNC Market Characteristics & Program Activities Tracking	Describe NRNC mkt and track changes over time so that NRNC activities can adapt and prioritize efforts to meet needs of diverse segments. Track activity and penetration of the statewide NRNC program, Savings By Design (SBD).	Develop standardized reports on characteristics of NRNC mkt (construction value & volume, bldg types, owner types, design team characteristics, etc), and present quarterly summary reports.	SCE	Douglas Mahone	\$ 486,000	Data Collection	03/30/2002

NEW CONSTRUCTION	SW016	NRNC Building Efficiency and Program Process Assessment	Data developed on ongoing basis. Quantify whole bldg and end use savings and efficiencies of both SBD part & nonpart bldgs. Collect process data (attitudes, practices) re the Statewide Savings By Design Program by interviewing active program participants as they go through program process. Results will provide immediate feedback to program mgrs and policy makers.	1) Conduct detailed onsite surveys and build DOE-2 models of ea bldg in the sample. Calculate energy savings by end use for whole bldgs. Devp quantifiable info on changes in bldg efficiency attributable to Savings By Design program. 2) Establish an early baseline of program part attitudes & response to Program. Data will be gathered regularly to track changes over time.	SCE	Douglas Mahone	\$ 640,000	Data Collection	06/30/2002
NEW CONSTRUCTION	SW018	NR Codes & Standards	Review and explain C&S statewide program work targeted at Title 24 upgrades in 2001 and 2004.	1) Summarize on-going nonresidential codes and standards work, 2) Highlight linkages with other MT program activities that could feed into C&S area, 3) Project C&S program effects.	SCE	Douglas Mahone	\$ -	Cancelled	-

NEW CONSTRUCTION	SW019	Relocatable Classrooms	Baseline study and program review of existing pilot program. Market characterization and review of program potential.	1) Characterize market and current actors, 2) Estimate market size and energy savings potential statewide, 3) Review current pilot program findings and successes.	SCE	Douglas Mahone	\$ -	Cancelled	-
NONRESIDENTIAL	SW023	Market Research on Large Nonresidential Customer Wants and Needs	Unique effort to identify the needs and wants of large customers in specific industry segments	Input for program design	SCE	Pierre Landry	\$ 180,000	Completed	03/16/2001
NONRESIDENTIAL	SW024	Market Research on the Decision to Become an Energy Efficiency Service Provider (EESP)	Interviews with EESPs and non EESPs	Performance Contracting performance improvement by bringing in new EESP players	SCE	Pierre Landry	\$ 70,000	Completed	08/31/2001
NONRESIDENTIAL	SW025	Success Stories of Business to Business Services	Project has been rolled into SW024 for completion and reporting. It is an investigation into the business of providing business services.	Develop business strategies for EESPs in California	SCE	Pierre Landry	\$ -	Rolled into SW024	
NONRESIDENTIAL	SW026	Evaluation of PY2000 Nonresidential SPC Program	Process evaluation with estimates of eventual program	Recommendations for program improvements and estimates of net energy impacts. Scope	SCE	Pierre Landry	\$ 235,000	Data Collection	12/31/2001

			impacts	has expanded to look at net to gross from PY2000.					
NONRESIDENTIAL	SW027	Evaluation of PY2000 C/I Energy Efficiency Information Program	Statewide process and impact evaluation for C&I EE Information Programs	1) Determine accomplishment of program objectives. 2) Estimate program net behavioral impact.	SCE	Pierre Landry	\$ -	Cancelled	
GENERAL PURPOSE	SW031	Market Share Tracking (2000)	Establish market share baseline for various types of high-efficiency residential measures and track movement of market share over time. There will be reports coming out at data is analyzed.	To monitor the changing level of energy efficient market shares for various targeted end use measure. The California Lamp Report 2000, Vol II is available as of April 19, 2001. New Construction 2001 Report is available as of July 11, 2001. Residential Appliances 2001 is available as of September 26, 2001. California Appliance Trends Vol II is available as of September 2001.	SCE	Richard Pulliam	\$ 477,225	Analysis	08/30/2001

RESIDENTIAL	SW032	Statewide Study of Customer Remodeling Decisions	Customer decision making study; remodeling scope and components considered; consumer's decision making process including awareness of options and sources of information; reasons for considering remodeling project; importance of various attributes in the decisions including first cost, project features (energy efficiency), installation practices, contractors, subcontractors, etc.	Developing a profile of home owners in CA who plan to or have recently remodeled and developing segmentation. Look at key drivers and see how they affect decision making. Identify barriers to choices of EE, key information, and delivery channels for remodeling.	SCE	Shahana Samiullah	\$ 125,000	Completed	07/15/2001
RESIDENTIAL	SW033	Process Evaluation of PY 2000 Residential Contracting Program (RCP)	Examine the procedures and processes used to promote and implement the Statewide RPC program and make recommendations for improving	Document how PY2000 programs were designed & intended to achieve sustainable changes in the mkt in Year 2000. Characterize how they did work. Develop program recommendations to improve future RCP.	SCE	Shahana Samiullah	\$ 110,000	Completed	06/30/2001

			proceedures and processes.						
							Sub-Total PY2000	\$ 2,323,225	
Utility-level Studies PY 2000									
GENERAL PURPOSE	US108	Nonresidential Customer Classification Coding Project	Assigns SIC and NAICS codes for all nonresidential customer accounts	Accurate SIC and NAICS codes for all nonresidential customers. Develop and refine software system for analysis.	SCE	Michael Redding	\$ 120,000	Data Collection	No Report Planned
GENERAL PURPOSE	US109	Weather Data System Project	Gather, store, and provide access to weather data from the 24 SCE weather stations.	Provide historical and current weather data for energy efficiency analyses.	SCE	Michael Redding	\$ 130,000	Data Collection	No Report Planned
RESIDENTIAL	US110	Residential Refrigeration Performance Milestone	Identify total and energy efficient retailer floor stock of refrigerators in SCE territory.	Determine change in proportion of energy efficient refrigerator floor stock.	SCE	Shahana Samiullah	\$ 30,000	Completed	04/01/2001
RESIDENTIAL	US111	Residential Window Performance Milestone	Identify inventory and Energy Star rated inventory and stocking levels	Determine % change in floor stock of Energy Star rated windows	SCE	Shahana Samiullah	\$ 30,000	Completed	04/01/2001
RESIDENTIAL	US112	Residential Energy Efficient Window Awareness Study	National survey being used to determine residential awareness of energy efficient	Determine customer awareness of high performance windows.	SCE	Marian Brown	\$ 5,000	Completed	05/01/2001

			windows.						
NONRESIDENTIAL	US113	Nonresidential HVAC Diagnostic Contractor Survey	Report on contractor technician training and use of HVAC diagnostic tool (CHECKMe!)	Identify the increased number of technicians trained and using the tool. This information will be included in the workpapers of the 2001 AEAP filing.	SCE	Marian Brown	\$ -	Completed	05/01/2001
RESIDENTIAL	US114	New Home Energy Efficiency Milestone Report	Gather data on total new single family homes permitted during 2000 and the number exceeding Title 24 by 10% or more.	Identify proportions of new single family homes exceeding Title 24 by 10% or more. Documentation completed by Program Staff.	SCE	Marian Brown	\$ -	Completed	05/01/2001
NONRESIDENTIAL	US115	Small Commercial Do-It-Yourself Energy Survey Study	Evaluate how many measures are implemented, baseline levels, and customer expectations.	To establish baseline estimates of customer adoption rate, and to establish customer expectations.	SCE	Angela Jones	\$ 38,261	Completed	03/30/2001
NONRESIDENTIAL	US116	Evaluation of SCE's Emerging Technology Showcase Program	Two phase evaluation of the emerging technology program. Phase one estimates baseline levels of awareness, attitudes, knowledge and behavior, Phase 2 is devoted to	1) measure baseline awareness of targeted emerging technologies, 2) develop a program theory, hypotheses, and indicators of market effects, 3) measure changes in awareness and any near term market effects of those directly exposed to showcases.	SCE	Angela Jones	\$ 150,000	Between Phases	05/01/2002

			measuring changes in baseline estimates along with any near term market effects.							
NONRESIDENTIAL	US117	Evaluation of SCE's Technology Applications Centers (CTAC & AgTAC)	Market effects and baseline awareness study of CTAC and AgTAC	1) conduct market effects study of CTAC & AgTAC, 2) complete basic process evaluation, 3) conduct a baseline study to assess customer awareness of CTAC and AgTAC.	SCE	Angela Jones	\$ 130,000	Completed	09/11/2000	
RESIDENTIAL	US118	Marketing Training for Residential New Construction Sales Agents	Pre- and post-training testing of builder sales agents on marketing energy efficient features in new construction.	To determine increases in builder staff awareness of opportunities to market energy efficiency. Testing done for PY99 program.	SCE	Marian Brown	\$ -	Cancelled	-	
							Sub-Total PY2000	\$ 633,261		
							Total PY2000	\$ 2,956,486		
Statewide Studies PY 2001										
NONRESIDENTIAL	SW053	Process Evaluation of PY2001 SPC Program	Process evaluation to assist in planning the 2002 SPC Program	Investigating whether program changes for 2001 affect who participates and why.	SCE	Pierre Landry	\$ 60,000	Final Reporting	10/31/2001	

NONRESIDENTIAL	SW057	Lighting Controls Effectiveness Assessment	Study the effectiveness of manually switched lighting controls, such as bi-level switching. Study includes data collection of occupancy patterns and lighting operation.	<p>There are four objectives:</p> <ol style="list-style-type: none"> 1. Measure actual operation of typical lighting controls as influenced by occupant behavior, 2. Estimate demand and energy savings of manual switching, 3. Identify occupant behavior that reduce savings potential, and 4. Compare actual savings to Title 24 assumptions of savings 	SCE	Cathy Chappell	\$125,000	RFP out	02/28/2002
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RESIDENTIAL	SW048	Statewide Residential Customer Needs Assessment Study	<p>This study was sought by some stakeholders and ordered by the Administrative Law Judge on October 25, 2000. The overall research objective is to assess the needs of residential customers, with a particular focus on hard-to-reach customers, as they relate to greater program participation and adoption of energy efficiency measures. Additionally, the intent is to develop outreach strategies and program design features to foster program participation and measure adoption. The proposed study will specially focus on hard-to-reach residential customer segments defined as multi-family</p>	<p>1. Provide in a single summary study a variety of information on the needs of the residential customer segments, with a particular focus on the segments identified as hard-to-reach: multi-family housing; tenants; limited-English speaking customers; moderate income customers; and rural customers; 2. Use the information gathered to suggest outreach strategies and program design features to foster greater program participation among hard-to-reach customer groups to promote the residential programs; and 3. Use the needs information to suggest program design features that can increase customer adoption of measures promoted through the residential programs.</p>	SCE	Shahana Samiullah	\$ 89,775	Completed	07/15/2001
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			housing; tenants; limited-English speaking customers; moderate-income customers; and rural customers.						
RESIDENTIAL	SW058	Statewide RCP Energy and Market Impact Assessment Study 2001	This object of this study is to measure energy impacts for the single family and multi-family RCP program. Also, it will be examining of diffusion of	To measure energy impacts for single family and multi-family RCP program and examing diffusion of program promoted measures.	SCE	Shahana Samiullah	\$ 250,000	Data Collection	12/31/2001

			program promoting measures among the contractor segments through key market effects indicators.						
						Sub-Total PY2001 \$	524,775		
<i>Utility Specific Studies PY 2001</i>									
NONRESIDENTIAL	US142	Analysis of Air Conditioner Recycling Programs	Review of available studies; interviews with appliance retailers and program managers. Analysis and recommendations regarding a potential new SCE program.	To assess the energy savings and program design strengths and weaknesses of air conditioner recycling programs.	SCE	Shahana Samiullah	\$ 7,000	Completed	05/01/2001
NONRESIDENTIAL	US143	Evaluation of SCE Schools Program	Review of program materials, interviews with program managers and participating teachers, review of energy savings estimates, analysis of strengths and weaknesses.	To provide a basis for determining which program or programs to continue funding; to make recommendations for improving the programs.	SCE	Angela Jones	\$ 30,000	Completed	08/31/2001

RESIDENTIAL	US144	Residential Audit Programs Evaluation	Review program materials, gather program data, analyze program delivery and energy savings attributable to website, in-home, mail-in, telephone and time-of-sale audits.	To improve estimates of energy savings achieved by each type of audit program and to assess customer satisfaction with the audit programs.	SCE	Angela Jones	\$ 85,000	Data Collection	06/30/2002
GENERAL PURPOSE	US145	Evaluation of Pool Pump Timer Program	Statewide impact and process evaluation, managed by PG&E, co-funded by 3 utilities.	To develop estimates of the energy and demand savings achieved by the program.	SCE	Richard Pulliam	\$ 60,000	Data Collection	12/31/2001
GENERAL PURPOSE	US146	Conservation Motivation Study	Survey and analysis to identify residential customer groups with various motivations for conserving energy, their conservation, and the effects of other factors.	To provide information for designing and targeting effective conservation messages.	SCE	Marian Brown	\$ 20,000	Data Collection	04/30/2002
RESIDENTIAL	US147	Refrigerator Recycling Impact Analysis	Updated analysis of program participants and energy usage of recycled refrigerators.	To provide updated energy savings estimates for the program.	SCE	Marian Brown	\$ 60,000	Pre-RFP	06/30/2002

GENERAL PURPOSE	US148	Energy Design Resources Usage Study	Evaluation of patterns of usage of energy design tools provided by SCE.	To provide a qualitative assessment of the impact of the program and to make recommendations for program design and delivery.	SCE	Richard Pulliam	\$ 70,000	Pre-RFP	06/30/2002
GENERAL PURPOSE	US149	Unit Energy Savings Analysis	To update the engineering algorithms that SCE uses to estimate measure energy savings across all sectors.	To provide more current and accurate UES estimates by incorporating the effects of new appliance and building standards and new technologies.	SCE	Marian Brown	\$ 200,000	Research Plan	06/30/2002
GENERAL PURPOSE	US150	Strategic Options Analysis of EE Programs	Develop and test a model that uses a financial markets methodology (the Black-Scholes approach) to estimate a different type of benefit provided by EE programs.	To assess a new methodology that estimates the option value of EE program portfolios in reducing future energy price volatility.	SCE	Marian Brown	\$ 40,000	Data Collection	11/30/2001
GENERAL PURPOSE	US151	Conference and Study regarding Summer 2001-focused Energy Efficiency Programs	A national study and conference with particular emphasis on California, co-funded by 3 California utilities, the CEC, and other organizations.	To provide information to policymakers about the contributions and lessons learned about reliability-focused energy efficiency programs.	SCE	Marian Brown	\$ 25,000	Data Collection	02/28/2002

GENERAL PURPOSE	US152	Market Potential Database	Develop a database that can quickly provide market potential estimates for a wide variety of EE measures or end uses in the SCE service territory.	To make these data quickly available to program planners and policymakers.	SCE	Pierre Landry	\$ -	Research Plan	03/31/2002
							Sub-Total PY2001 \$ 597,000		
							Sub-Total PY2001 \$ 1,121,775		

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

Study Area	Project ID	Project Title	Project Description	Project Objective (or milestone addressed for utility-level studies)	Lead Utility	Contact (Project/Area Manager)	Budget	Project Status	Expected Date of Completed Report
<i>Statewide Studies PY 2000</i>									
NONRESIDENTIAL	SW021	Statewide Industrial Sector Study	1) Existing utility records, program tracking databases and recent evaluations were used to characterize industrial customers by SIC2 code, energy use, end-use, location, size, history of participation in energy efficiency programs, etc. 2) Search for patterns of success in the industrial mkt sector and provide guidance for improving current programs 3) Work closely with project/area mgrs responsible for other nonres statewide MA&E activities to ensure adequate attention paid to industrial information needs. 4) identify future MA&E work in the	This current study will detect and analyze patterns related to industrial sector energy efficiency.	PG&E	Rafael Friedmann	\$ 200,000	Final Reporting	11/30/2001

			industrial sector						
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NEW CONSTRUCTION	SW028	Investigate Builder Compliance to Title 24	This is a two year study and continues through program year 2001. This study will provide a baseline for residential new construction practices. The purpose of this study is to determine the barriers to builders not complying with Title 24, the differences between builders who do not comply and builders who exceed Title 24. This study will attempt to determine kinds of incentives are needed to encourage builders to meet Energy Star standards. It will attempt to determine how the July 1999 changes to Title 24 impact builder practices.	Identify proportion of builders who are not complying and to characterize them in terms of noncompliance; demographically (ie climate zone, type of homes built, measure installed, etc.).	PG&E	Mary Kay Gobris	\$ 350,000	First Report Completed	09/10/2001
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NEW CONSTRUCTION	SW029	Market Effects Tracking of Residential New Construction	<p>This study will examine the impact that each utilities RNC program has on customer awareness of energy efficiency options, builders practices in promoting and implementing greater than Title 24 standards for RNC, Realtors promotion of energy efficient RNC, and how lenders and appraisers consider energy efficiency in the lending and appraisal processes. This is a two year study with comparisons to prior years results. The study for the 2000 program will begin in the first quarter of 2001 and will end by July/Aug 2001. There will be similar dates for the 2001 program.</p>	<p>Scope of this project has changed to reflect less emphasis on market transformation. Most of the emphases is now on impact of builder training programs. Also includes changes in builder practices due to the energy crisis and how builders will be complying with new T-24.</p>	PG&E	Mary Kay Gobris	\$ 200,000	Final Reporting	11/01/2001
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NONRESIDENTIAL	SW039	Studies of Small/ Medium Nonresidential Program Elements	1) Assessment of market potential for energy efficiency in the nonres sector. 2) Continue to study, evaluate & support program interventions in sm nonres mkt. 3) Hard to reach participation analysis. 4) Needs assessment for small nonres customers. 5) MA&E tracking in small nonres sector, 6) Express Efficiency tracking	Provide initial or updated feedback on programs or intervention strategies not covered in Project SW041. One or more individual or combined mkt assessment and eval studies will be conducted focusing on energy audits, website tools, energy centers, modeling. 2) a) Provide updated info on end-user & supply-side actor energy effic attitudes & practices; b) process eval feedback on py2001 program interventions; 3) Improve understanding of sub-segment differences in efficiency related attitudes, barriers, and practices among nonres customers. Depending on final scope, results of analyses conducted will be used to ID key leverage points by sub-mkt	PG&E	Chris Ann Dickerson	\$ 1,200,000	Draft Reporting	12/31/2001	
							Total PY2000	\$ 1,950,000		
Utility-level Studies PY 2000 - No MA&E utility specific studies occurred in PY2000										
Statewide Studies PY 2001										
RESIDENTIAL	SW049	Summer Initiative Pool Pump Program Evaluation	Market characterization, baseline, and post impact evaluation of the program.	To assess the peak impacts of the pool pumps program.	PG&E	Marty Kurtovich	\$ 181,230	Data Collection	12/30/2001	

RESIDENTIAL	SW050	M&V Study for 2001 RNC Programs	Will provide estimates and energy and demand for measures typically installed as part of residential new construction programs. This study will determine energy savings from energy efficiency measures that exceed Title 24 requirements. Since Title 24 regulations were revised in July 1999, the previous savings estimates need to be updated to reflect changes in Title 24. The results of this study will be used to prepare estimates of the peak and energy savings impacts of PY 2001 programs.	Using the results of the Title 24 simulation models (Builder Compliance to Title 24) and results of previous evaluations, determine energy savings. This study will utilize the results from Builder Compliance to Title 24 particularly the "as built" building characteristics of residential new construction.	PG&E	Mary Kay Gobris	\$ 100,000	Final Reporting	11/01/2001
NONRESIDENTIAL	SW054	Industrial Sector Case Studies	The purpose of the research is to provide input for future industrial sector program enhancements. The focus will be on the industries and/or end-uses with significant demand reduction potential.	Identify how to capture the largest untapped potential identified in SW021.	PG&E	Rafael Friedmann	\$ 500,000	Pre-RFP	08/30/2002

NONRESIDENTIAL	SW055	Market Assessment of Small and Medium Industrial Sectors (Previously - Ongoing Program & Marketing Tracking)	The purpose of the research is to provide input for the design and/or enhancements to future industrial sector programs targeted at the small and medium customers that can be considered under-served.	Examine patterns of use and untapped opportunities for energy efficiency in small and medium industrial customers and understand these customer needs and wants. To propose energy efficiency programs to them.	PG&E	Rafael Friedmann	\$ 300,000	Pre-RFP	08/30/2002	
NONRESIDENTIAL	SW056	Compressed Air Persistence Study	This study is a extension of CPUC persistence study 3B that sought to examine on the ongoing basis compressed air systems by installing monitoring equipment. This study provides a relatively inexpensive way to determine the continued commitment of plant managers (and thus the persistence of energy savings) in using the results of the monitoring equipment in maintaining their facilities.	The results of this study will be used to determine the persistence of energy savings initiated as a result of installing monitoring equipment from previous programs and will be used to decide if the continued subsidy of this type of equipment is cost-effective for ratepayers.	PG&E	Rafael Friedmann	\$ 30,000	Final Reporting	12/31/2001	
							Sub-Total PY2001	\$ 1,111,230		
Utility Specific Studies PY 2001										
RESIDENTIAL	US137	Residential Load Database Development and Analysis	Load Data Cleaning and Analysis	To provide estimates of peak load usage in order to develop H-factors (percentage demand/energy use by daytype and time-of-day) to used in estimating program impacts.	PG&E	Valerie Richardson	\$ 69,635	Analysis	12/07/2001	

RESIDENTIAL / NONRESIDENTIAL	US138	1-2-3 Cashback Assesment	Program Evaluation and Assessment of 1-2-3 Cashback	To determine effectiveness of 1-2-3 Cashback in communicating no-cost, low-cost and investment opportunities and influencing behavior and practices for reducing energy use.	PG&E	Kenneth James	\$ -	RFP out	01/15/2002	
NEW CONSTRUCTION	US139	Multi-family Water Heating HVAC/Window Survey	Baseline Study	To determine baseline practices for MF new construction to determine possible changes in codes and standards	PG&E	Mary Kay Gobris	\$ 250,000	RFP out	07/01/2002	
NEW CONSTRUCTION	US140	Task Lighting Field Study	Baseline Study	To determine baseline practices in task lighting and possible changes to codes and standards.	PG&E	Mary Kay Gobris	\$ 50,000	CWA	07/01/2002	
RESIDENTIAL	US141	Non-Energy Benefits of High Efficiency Washers Assessment	Determine cost benefits from non-energy related areas for high efficiency clotheswashers and dish washers rebated by PG&E Programs.	To monetize the non- energy benefits of decreased water use, reduced detergent use, and reduced dryer use for high efficiency clotheswashers and dishwashers.	PG&E	Rafael Friedmann	\$ 20,000	Final Reporting	11/01/2001	
							Sub-Total PY2001	\$ 389,635		
							Total PY2001	\$ 1,500,865		

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

Study Area	Project ID	Project Title	Project Description	Project Objective (or milestone addressed for utility-level studies)	Lead Utility	Contact (Project/Area Manager)	Budget	Project Status	Expected Date of Completed Report
Statewide Studies PY 2000									
RESIDENTIAL	SW010	Implementation of Phase 3 of the Round II Statewide Lighting & Appliance Study	Complete market effects studies that evaluate progress of these programs towards market transformation.	1) Collect pertinent data to track mkt indicators identified in Study Phase 1. 2) Assess mkt effects of energy efficiency programs by: documenting changes, estimating & quantifying hypothesized mkt effects through data collection, linking mkt effects	SDG&E	Rob Rubin	\$ 200,000	Completed	05/01/2001
						Sub-Total PY2000	\$ 200,000		
Utility-level Studies PY 2000									
RESIDENTIAL	US090	Energy Efficient Mortgages	Get a set number of customers to apply for an energy efficient mortgage	Count the number of applications for a home energy rating	SDG&E	Rob Rubin	\$ 70,000	Completed	05/01/2001

RESIDENTIAL	US091	Multi-family Property Owners Performance Contracting	Identify those who offer performance contracting to multi-family property owners/property managers	Count number of contractors offering performance contracting to this group	SDG&E	Rob Rubin	\$ 10,000	Completed	05/01/2001
RESIDENTIAL	US092	RCP Contractor Training	Contractors are trained in duct testing / whole system approach	Measure the number of contractors who complete training / demonstrate required skills by December, 2000	SDG&E	Rob Rubin	\$ 85,000	Completed	05/01/2001
RESIDENTIAL	US093	HVAC Contractor Training	Train contractors to properly use Manuals J & S	Measure the number of contractors who use Manual J & S correctly and compare to the 1999 Baseline.	SDG&E	Rob Rubin	\$ 50,000	Completed	05/01/2001
RESIDENTIAL	US094	Residential Cross-Cutting	Measure the increase of customers who implement of those who receive information	Measure the increase of customers who implement of those who receive information	SDG&E	Rob Rubin	\$ 50,000	Completed	05/01/2001
NONRESIDENTIAL	US102	Evaluation of Large Nonresidential Comprehensive Retrofit Program - Seminar	Follow-up survey and analysis	Perform a market assessment and determine the number of seminar attendees that indicate a willingness to adopt energy efficient measures and techniques.	SDG&E	Andrew Sickles	\$ 50,000	Completed	05/01/2001
RESIDENTIAL	US093	HVAC Contractor Training	Train contractors to properly use	Measure the number of contractors who use Manual J & S correctly	SDG&E	Rob Rubin	\$ 50,000	Completed	05/01/2001

			Manuals J & S	and compare to the 1999 Baseline.					
NONRESIDENTIAL	US104	Evaluation of Nonresidential HVAC Turnover Program	Follow up survey and analysis	Perform a market assessment and determine the ratio of high efficiency HVAC units stocked relative to standard efficiency units.	SDG&E	Andrew Sickles	\$ 70,000	Completed	05/01/2001
NONRESIDENTIAL	US105	Evaluation of Nonresidential Motor Turnover Program	Follow-up survey and analysis	Perform a market assessment and determine the market share (sales) of CEE rated motors	SDG&E	Andrew Sickles	\$ 70,000	Completed	05/01/2001
NEW CONSTRUCTION	US106	Market Assessment Study for Commercial New Construction Program - Whole Building Approach	Follow-up survey and analysis	Perform a market assessment and determine the number of design professionals that demonstrate key concepts of the training.	SDG&E	Kevin McKinley	\$ 50,000	Completed	05/01/2001
NEW CONSTRUCTION	US107	Market Assessment Study for Commercial New Construction Program - >5% over Title 24 Market Share	Cancelled in lieu of statewide study (SW015)	Perform a market assessment and determine the ratio of floor space (committed or planned) that exceeds Title 24 standards by 5% or more.	SDG&E	Kevin McKinley	\$ 125,000	Cancelled	
RESIDENTIAL	US119	Evaluation of Residential Lighting Fixture	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the	SDG&E	Rob Rubin	\$ 30,000	Completed	05/01/2001

		Manufacturers Program		number of fixture manufacturers offering energy efficient products					
RESIDENTIAL	US120	Evaluation of Residential Lighting Sales Associates Programs	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the number of lighting sales associates who are knowledgeable and aware of energy efficient lighting products, and the methods to convey information to customers	SDG&E	Rob Rubin	\$ 25,000	Completed	05/01/2001
RESIDENTIAL	US121	Evaluation of Residential Appliances Program	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the floor stock of qualifying Energy Star appliances	SDG&E	Rob Rubin	\$ 25,000	Completed	05/01/2001
RESIDENTIAL	US122	Evaluation of Residential Refrigerator Program	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the floor stock of qualifying Energy Star 2001 DOE compliant refrigerators	SDG&E	Rob Rubin	\$ 25,000	Completed	05/01/2001
RESIDENTIAL	US123	Evaluation of Residential Appliance Sales Associates Program	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the number of appliance sales associates who	SDG&E	Rob Rubin	\$ 25,000	Completed	05/01/2001

				are knowledgeable and aware of energy efficient appliances						
							Sub-Total PY2000	\$ 810,000		
							Total PY2000	\$ 1,010,000		
Statewide Studies PY 2001										
RESIDENTIAL	SW051	Implementation of Phase 4 of the Round II Statewide Lighting & Appliance Study	1) Collect pertinent data to track mkt indicators identified in Study Phases 1-3. 2) Assess mkt effects of energy efficiency programs by: documenting changes, estimating & quantifying hypothesized mkt effects through data collection, linking mkt effects. Estimate Load Impacts from 2001 statewide programs administered by parties outside the utilities.	Complete market effects studies that evaluate progress of these programs towards market transformation.	SDG&E	Rob Rubin	\$ 350,000	Data Collection	05/01/2002	

RESIDENTIAL	SW052	Residential Ceiling Fans	Energy Star ceiling fans will be available in 2001. However, due to lack of data on the run hours of the fan motor and the lighting, energy savings cannot accurately be determined.	Determine the run hours of existing residential ceiling fan motors and lights in California.	SDG&E	Rob Rubin	\$ 150,000	Data Collection	05/01/2002
Sub-Total PY2001							\$ 500,000		
<i>Utility Specific Studies PY 2001</i>									
RESIDENTIAL	US128	Evaluation of the Residential Lighting Program	Increase the purchase and availability of ENERGY STAR qualified Lighting and will produce measurable energy savings by increasing the use of energy-efficient Lighting in residential applications.	Increase by 1 the number of eligible retailers (companies) participating in the co-op program. An eligible retail company for the purpose of this milestone is defined as one with 10 or more stores that conduct business with the public on a retail basis which sells ENERGY STAR® lighting products. (Level 2 Performance – none)	SDG&E	Rob Rubin	\$ 25,000	Data Collection	05/01/2002

RESIDENTIAL	US129	Evaluation of the Residential Appliances Program	Increase the purchase and availability of ENERGY STAR qualified Appliances and will produce measurable energy savings by increasing the use of energy-efficient Appliances in residential applications.	Of the 6 major appliance manufacturers that produce ENERGY STAR® qualified products (clothes washers, dishwashers, and refrigerators), sign-up 2 of these major manufacturers to the 2001 co-op program. (Level 2 Performance – 1 manufacturer)	SDG&E	Rob Rubin	\$ 25,000	Data Collection	05/01/2002
NEW CONSTRUCTION	US130	Evaluation of the Large Nonresidential Comprehensive Retrofit Program	Work with large customers to develop demonstration projects to promote emerging technologies.	During PY2001, increase by 3 customers that install or commit to install a high-reflectivity roof over the PY2000 baseline. (Level 2 Performance - increase by 2 customers)	SDG&E	Andrew Sickles	\$ 150,000	Data Collection	05/01/2002
NEW CONSTRUCTION	US131	Market Assessment Study for Residential New Construction Program - Single Family	To increase the number of energy efficient, CHEERS-rated, ENERGY STAR® qualified homes and to increase the number of design centers participating in the program.	Achieve 25 % market share increase of newly constructed ENERGY STAR® homes over the 2000 base year (12.5% market share) - (Level 2 Performance - Scaleable where 70% = 17.5% market share increase)	SDG&E	Kevin McKinley	\$ 75,000	Data Collection	05/01/2002

NEW CONSTRUCTION	US132	Market Assessment Study for Residential New Construction Program - Multi-Family	To increase the number of energy efficient, CHEERS-rated qualified homes and to increase the number of design centers participating in the program.	Achieve 8 % market share of newly constructed high efficiency units (i.e., units that exceed Title 24 Standard in place at the end of 2000 by 15%) - (Level 2 Performance - Scaleable where 70% = 5.6% market share	SDG&E	Kevin McKinley	\$ 75,000	Data Collection	05/01/2002
RESIDENTIAL	US133	Evaluation of the Residential Schools Program	Process evaluation	Evaluation of new pilot program.	SDG&E	Rob Rubin	\$ 50,000	Data Collection	05/01/2002
GENERAL PURPOSE	US134	Ridgehaven Building	Case Study	Case Study Update of the City of San Diego's Ridgehaven Green Building - review and describe building's operating results during past 4 years since completion and occupancy	SDG&E	Rob Rubin	\$ 10,000	Draft Reporting	05/01/2002
RESIDENTIAL / NONRESIDENTIAL	US135	Evaluation of Residential and Nonresidential Audit Programs	Follow-up surveys and analysis	To determine if audit participants who do NOT participate in follow-up SDG&E energy efficiency programs implement recommendations for EE measures and/or behavioral changes from the audit	SDG&E	Kevin McKinley	\$ 20,000	Data Collection	05/01/2002

GENERAL PURPOSE	US136	Cost Effectiveness Updates	Cost- Effectiveness Assumptions to be verified, validated & expanded	1) Verify Input assupmtions (savings), 2) Identify Commercially available technologies not currently being offered, 3) Identify Emerging Technologies (available in 2003,'04, & '05)	SDG&E	Andrew Sickles	\$ 169,000	Data Collection	05/01/2002	
							Sub-Total PY2001	\$ 599,000		
							Total PY2001	\$ 1,099,000		

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

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

				<p>efficiency units upon implementation of the Advanced Water Heater Program Element of SCG's Small Nonresidential Comprehensive Retrofit Program, and 4) with respect to nonresidential water heater applications, determining existing market barriers to adoption of high efficiency water heater designs.</p>					
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NONRESIDENTIAL	US096	Advanced Water Heaters and Space Heat Boilers	Gather information and collect data to develop estimates of change in the market share of high efficiency space heat boilers in the small (core) nonresidential market	The objective of this study is four-fold: 1) to establish the baseline inventory of the market share of nonresidential space heat boilers in existence in SCG's service territory, 2) to establish the existing ratio of high efficiency (i.e., greater than Title 24 standard) space heat boilers sold relative to the standard efficiency units, 3) to develop an estimate of the change in the ratio of high efficiency space heat boilers sold relative to the standard efficiency units upon implementation of the Space Conditioning Efficiency Improvement Program Element of SCG's Small Nonresidential Comprehensive Retrofit Program, and 4) with respect to nonresidential space heat boiler applications, determining existing market barriers to	SCG	Kevin Gerrity	\$ 40,000	Completed	12/31/2000
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				adoption of high efficiency space heat boiler designs.					
NONRESIDENTIAL	US097	Catalytic Infrared Heater Study	Baseline inventory of existing market share of catalytic infrared heaters used in industrial processes	Inventory of this type of equipment used in the industrial setting.	SCG	Kevin Gerrity	\$ -	Cancelled - Did not meet milestone	
NEW CONSTRUCTION	US098	Energy Advantage Home Market Effects Study		Program re-designed and obviated the need for this study.	SCG	Craig Tyler	\$ -	Cancelled	
RESIDENTIAL	US099	Residential Contractors Program Market Effects Study		This is being done in conjunction with SCE.	SCG	Craig Tyler	\$ -	Cancelled	

RESIDENTIAL	US100	Residential Upstream Water Heater Market Effects Study	Increase the number of plumbers/water heater installers employing 0.60+ EF units as their baseline by 100%	To measure the number of plumbers/water heater installers employing 0.60+ EF units as their baseline	SCG	Craig Tyler	\$ -	Cancelled - Did not meet milestone	
GENERAL PURPOSE	US101	Third Party Local Government Initiatives Evaluation	1/3 of local TPI projects must satisfactorily complete their deliverables/milestones	Determine what has been done and see if the deliverables have been completed through review of contract and submittal of invoices.	SCG	Craig Tyler	\$ 150,000	Completed	05/01/2001
NONRESIDENTIAL	US124	Advanced Water Heating Systems - Phase II	Develop an estimate of the change in the ratio of high efficiency (i.e., greater than Title 24) water heaters sold relative to standard efficiency units in PY2000 due to the impact of SoCalGas's statewide Express Efficiency program.	Determine the percent of change of purchased high efficiency water heaters.	SCG	Kevin Gerrity	\$ 35,000	Completed	05/01/2001
Total PY2000							\$ 265,000		
<i>Utility-level Studies PY 2001</i>									
RESIDENTIAL	US125	SoCalGas RCP Impact Evaluation	Impact Evaluation of the Residential Contractor Program.	Determine the kW and kWh due to the RCP program.	SCG	Jim Green	\$ 90,000	RFP out	12/31/2001
GENERAL PURPOSE	US126	Local Government Initiative and TPI Assessment	Determine the energy savings, avoided costs, program costs, and cost effectiveness of the the local government initiatives and TPI projects.	Assess impacts associated with SoCalGas's Local Government Initiatives and TPI projects.	SCG	Jim Green	\$ 140,000	RFP out	12/31/2001

NONRESIDENTIAL	US127	Small Nonresidential Comprehensive Retrofit Program and Nonresidential Gas AC Program	Energy savings impact assessment of the small nonresidential comprehensive retrofit program and the nonresidential gas AC program.	Determine kW, kWh, and therm impacts of the programs.	SCG	Jim Green	\$ 90,000	Project Initiation	12/31/2001	
							Total PY2001	\$ 320,000		

*California Energy Commission's
Statewide Evaluation Projects and Data Collection Activities*

Study Area	Project ID	Project Title	Project Description	Project Objective (or milestone addressed for utility-level studies)	Lead Utility	Contact (Project/Area Manager)	Budget*	Project Status	Expected Date of Completed Report
<i>Statewide Studies PY 1999</i>									
GENERAL PURPOSE	SW020	Nonresidential Market Share Tracking	Tracking of nonresidential market decision factors and energy efficient equipment	Looking for adoption of energy efficient practices	CEC	Adrienne Kandel	\$ 1,010,000	Data Collection	06/12/2002
GENERAL PURPOSE	SW046	DEER Update	To update the residential and commercial measure cost portion of the database and energy savings and peak demand reductions data for the residential sector only.	To update the data needed for measure cost effectiveness evaluation.	CEC	Dennis Smith	\$ 350,000	Completed	08/01/2001
						Total PY1999	\$ 1,360,000		

Statewide Studies PY 2000

NONRESIDENTIAL	SW012	Literature Review of Existing Research.	Review CADMAC and other studies that overlap with nonresidential remodeling and renovation	Determine what information is available, where it is, and fill in gaps on nonresidential remodeling and renovation.	CEC	Sylvia Bender	\$ 50,000	Completed	09/01/2001
NONRESIDENTIAL	SW013	Nonresidential Remodeling and Renovation Study	Market characterization of the NR remodeling and renovation sector	Broad characterization of the nonresidential remodeling and renovation market	CEC	Sylvia Bender	\$ 200,000	Draft Reporting	11/30/2001
GENERAL PURPOSE	SW044	California CEUS	The California CEUS will be the Commission's primary commercial building end-use research effort. It will: 1) Development of energy end-use estimates and end-use load profiles by commercial market segment 2) Development of end-use saturation estimates as input into the	The scope of this project is to 1) design a representative sample of commercial buildings and collect the required characteristic data, 2) construct calibrated engineering simulation models for individual buildings that are surveyed, and 3) organize the engineering simulation models in a batch environment for performing energy demand analysis	CEC	Mark Ciminelli	\$ 3,500,000	Data Collection	09/15/2003

			Commission end-use forecasting models 3) Development of a commercial market segment end-use disaggregation modeling system for use in conducting building energy demand analysis							
RESIDENTIAL	SW047	Residential Appliance Saturation Survey	A survey of residential dwellings to collect appliance saturation and usage patterns.	Main objectives are 1) description of household demographics, 2) appliance saturations, and 3) electricity consumption (kWh and kW).	CEC	Glen Sharp	\$ 2,375,000	Project Initiation	06/30/2003	
						Total PY2000	\$ 6,125,000			
<i>Statewide Studies PY 2001</i>										

NONRESIDENTIAL	SW014	Phase Two Nonresidential Remodeling and Renovation Study	Potentially this will be the project description: 4 specific mkts with substantial unmet potential will be selected. Avail info will be augmented with focus groups to characterize these mkts in depth with respect to mkt actors, motivations & barriers to adoption of economic EE technologies. The project will also assess whole bldg & end use energy savings and efficiencies of gut rehabs & shell completions. Gather attitudes & barriers specific to R&R mkt, cross-ck results w/ bldg surveys and DOE-2	Direction of this study will depend on results of Phase one (SW013). This project has been cancelled.	CEC	Sylvia Bender	\$	-Cancelled	
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			<p>simulations. Lastly, this project will gather specific info on opportunities to promote mkt transformation in the mkt of gas appliances. Examine opportunities for a systematic approach to mkt transformation surrounding event of R&R rather than appliance-based approach.</p>							
							Total PY2001	\$	-	

*Budgets as shown for the CEC represent multiple budget years

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2000 - 2001 Statewide Projects - Rev. 10/24/01

*Types of Evaluations within the Ongoing Statewide Projects**

Study Area	Baseline	Compliance	Impact	Market Assessment and/or Characterization	Market Tracking	Other Type of Project	Planning and Scoping	Process
2001 Summer Initiative	1	0	1	1	0	0	0	0
Project is cross cutting of current areas	1	0	0	1	0	1	0	0
RESIDENTIAL								
Residential Lighting and Appliance	1	0	0	0	0	0	1	0
Residential Market Share Tracking	1	0	0	0	1	0	0	0
NONRESIDENTIAL								
Large Nonresidential Retrofit and Turnover	0	0	1	1	0	0	0	1
Small Nonresidential Retrofit and Turnover	1	0	0	1	0	0	0	1
Nonresidential Remodeling and Renovation	0	0	0	1	0	0	0	1
Nonresidential Market Share Tracking	0	0	0	0	1	0	0	0
Industrial	1	0	1	2	2	1	1	0
NEW CONSTRUCTION								
Nonresidential New Construction	1	0	1	2	1	0	0	1
Residential New Construction	1	1	1	1	0	0	0	0
Industrial/Agricultural New Construction	1	0	1	1	0	0	0	0

Codes and Standards Support and Local Government Initiatives								
All Areas	8	1	5	10	5	2	2	4

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

Project Type	MA&E Study Area	Project Number
Baseline	IND	SW021
	NRNC	SW057
	RLA	SW052
	RMST	SW031
	RNC	SW050
	SI	SW049
	SNR	SW039
	XCUT	SW044
Compliance	RNC	SW050
Impact	IND	SW056
	LNR	SW026
	NRNC	SW016
	RNC	SW050
	SI	SW049
Market Assessment and/or Characterization	IND	SW021
	IND	SW054
	LNR	SW025
	NRNC	SW015
	NRNC	SW057
	NRRR	SW013
	RNC	SW029
	SI	SW049
	SNR	SW039
	XCUT	SW044

Project Type	MA&E Study Area	Project Number
Market Tracking	IND	SW021
	IND	SW055
	NRMST	SW020
	NRNC	SW015
	RMST	SW031
Other Type of Project	IND	SW056
	XCUT	SW047
Planning and Scoping	IND	SW054
	RLA	SW052
Process	LNR	SW026
	NRNC	SW016
	NRRR	SW053
	SNR	SW039

Study Area	Project ID	Project Name	2002				2003				
			Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3
PG&E - PY 2000			▬								
NEW CONSTRUCTION	SW028	Investigate Builder Compliance to Title 24	◆ 9/10								
NEW CONSTRUCTION	SW029	Market Effects Tracking of Residential New Construction	◆ 11/1								
NONRESIDENTIAL	SW021	Statewide Industrial Sector Study	◆ 11/30								
NONRESIDENTIAL	SW039	Studies of Small/Medium Nonresidential Program Elements	◆ 12/31								
PG&E - PY 2001			▬								
RESIDENTIAL	SW049	Summer Initiative Pool Pump Program Evaluation	◆ 12/30								
RESIDENTIAL	SW050	M&V Study for 2001 RNC Program	◆ 11/1								
NONRESIDENTIAL	SW054	Industrial Sector Case Studies	◆ 3/30								
NONRESIDENTIAL	SW055	Ongoing Program & Marketing Tracking	◆ 3/30								
NONRESIDENTIAL	SW056	Compressed Air Persistence Study	◆ 12/31								
RESIDENTIAL	US137	Residential Load Database Development and Analysis	◆ 12/7								
RESIDENTIAL / NONRESIDENTIAL	US138	1-2-3 Cashback Assessment	◆ 1/15								
NEW CONSTRUCTION	US139	Multi-family Water Heating HVAC/ Window Survey	◆ 7/1								
NEW CONSTRUCTION	US140	Task Lighting Field Study	◆ 7/1								
RESIDENTIAL	US141	Non-Energy Benefits of High Efficiency Washers Assessment	◆ 11/1								

Study Area	Project ID	Project Name	2002				2003		
			Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4
SDG&E - PY 2000			▼						
NEW CONSTRUCTION	US106	Market Assessment Study for Commercial New Construction Program - Awareness	◆ 5/1						
NONRESIDENTIAL	US102	Evaluation of Large Nonresidential Comprehensive Retrofit Program - Seminar	◆ 5/1						
NONRESIDENTIAL	US103	Evaluation of Small Nonresidential Comprehensive Retrofit Program - High Efficient Clothes Washer	◆ 5/1						
NONRESIDENTIAL	US104	Evaluation of Nonresidential HVAC Turnover Program	◆ 5/1						
NONRESIDENTIAL	US105	Evaluation of Nonresidential Motor Turnover Program	◆ 5/1						
RESIDENTIAL	SW010	Implementation of Phase 3 of the Round II Statewide Lighting & Appliance Study	◆ 5/1						
RESIDENTIAL	US090	Energy Efficient Mortgages	◆ 5/1						
RESIDENTIAL	US091	Multi-family Property Owners Performance Contracting	◆ 5/1						
RESIDENTIAL	US092	RCPC Contractor Training	◆ 5/1						
RESIDENTIAL	US093	HVAC Contractor Training	◆ 5/1						
RESIDENTIAL	US094	Residential Cross-Cutting	◆ 5/1						
RESIDENTIAL	US119	Residential Lighting Fixture Manufacturers Program	◆ 5/1						
RESIDENTIAL	US120	Residential Lighting Fixture Sales Associates Program	◆ 5/1						
RESIDENTIAL	US121	Residential Appliances Program	◆ 5/1						
RESIDENTIAL	US122	Residential Refrigerator Program	◆ 5/1						
RESIDENTIAL	US123	Residential Appliance Sales Associates Program	◆ 5/1						

Study Area	Project ID	Project Name	2002				2003				
			Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3
SDG&E - PY 2001						◆ 5/1					
RESIDENTIAL	SW051	Implementation of Phase 4 of the Round II Statewide Lighting & Appliance Study				◆ 5/1					
RESIDENTIAL	SW052	Residential Ceiling Fans				◆ 5/1					
RESIDENTIAL	US128	Evaluation of the Residential Lighting Program				◆ 5/1					
RESIDENTIAL	US129	Evaluation of the Residential Appliance Program				◆ 5/1					
NEW CONSTRUCTION	US130	Evaluation of the Large Nonresidential Comprehensive Retrofit Program				◆ 5/1					
NEW CONSTRUCTION	US131	Market Assessment Study for Residential New Construction Program - Single Family				◆ 5/1					
NEW CONSTRUCTION	US132	Market Assessment Study for Residential New Construction Program - Multi-Family				◆ 5/1					
RESIDENTIAL	US133	Evaluation of the Residential Schools Program				◆ 5/1					
GENERALPURPOSE	US134	Ridgehaven Building				◆ 5/1					
RESIDENTIAL / NONRESIDENTIAL	US135	Evaluaiton of Residential and Nonresidential Audit Programs				◆ 5/1					
GENERALPURPOSE	US136	Cost Effectiveness Updates				◆ 5/1					
CEC - PY 1999											
GENERALPURPOSE	SW020	Nonresidential Market Share Tracking				◆ 6/12					
GENERALPURPOSE	SW046	DEERUpdate	◆ 8/1								
CEC - PY 2000											
NONRESIDENTIAL	SW013	Nonresidential Remodeling and Renovation Study				◆ 11/30					
GENERALPURPOSE	SW044	CaliforniaCEUS									◆
RESIDENTIAL	SW047	Residential Appliance Saturation Survey									◆ 6/30
NONRESIDENTIAL	SW012	Literature Review of Existing Research	◆ 9/1								

CEC Study SW044 is expected to be completed 9/15/03.

Section 8: Summer Initiative Programs

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

Refrigerator Recycling Program

Program Element Summary

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

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

Activity, Accomplishments, Market Progress and Modifications

The SI Residential Refrigerator Recycling program was completed in SCE's service territory at the end of 2000. SCE continues to offer a Residential Refrigerator Recycling program as part of its 2001 energy efficiency portfolio.

Pool Efficiency Program

Program Element Summary

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

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

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

Activities, Accomplishment, Market Progress, & Modifications

As of May 31, 2001, when enrollment ended, more than 44,000 customers had enrolled in the pool timer program, agreeing to reset their timers to operate during off-peak hours. At the end of the third quarter, 34,556 pool timer participants had received the \$40 incentive, for a total of \$1,382,240 paid out. Through the third quarter, 35,241 customers had reserved rebate funds for the purchase of energy-efficient pool pumps and motors to save energy. As of September 30, 2001: 6,551 applications had been processed and paid, for a total of \$614,000.

Third Party Initiative Program

Program Element Summary

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

Activities, Accomplishment, Market Progress, & Modifications:

Savings achieved through confirmed installations through September 30, 2001: 2,120 MWh of annualized energy savings and 0.69 MW of demand reductions (all lighting retrofits). The following provides a summary on the progress the specific TPIs:

- A residential new construction initiative offering builder incentives for high-efficiency air conditioners has been unable to secure commitments, and has no installed energy savings to date. The program contractor has notified SCE that it believes it should close down the program and allow the funds to be used for other purposes.
- A subsidized installation initiative for small/medium nonresidential air conditioning pre-coolers has encountered severe marketing problems and has no committed or installed energy savings to date. The program contractor has been granted a requested time extension till year-end 2001 to pursue sales leads and finalize marketing efforts.
- A residential audit and high-efficiency air conditioner rebate initiative has completed 7,000 audits to date, or about 90% of its proposed total, but has issued only 87 air conditioner rebate reservations, with one confirmed installation. Contractor has been given an extension through end of 2001 to follow through with existing rebate offers.

- A highly subsidized audit and direct installation initiative for small/medium nonresidential lighting retrofits has now committed all of its funds with signed contracts and to date has installed 0.69 MW of demand reductions and 2,120 MWh of annualized energy savings. This program is the one success story of the group due to the higher subsidy, but it has angered other retrofit contractors utilizing Express Efficiency rebates who were undercut by the higher rebate that this TPI program could offer.

LED Traffic Signal Rebate Program

Program Element Summary

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

The program provides incentives for the following LED traffic signals:

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

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

Activities, Accomplishment, Market Progress, & Modifications

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

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

As part of SCE's 2001 program proposal, SCE has continue the LED-Traffic Signal program in coordination with a similar program offered through the California Energy Commission. In addition, as a result of several cities reserving funds in excess of actual costs, 21 additional

retrofit projects have been added to the reservation list. These projects will provide additional savings exceeding 10,300 MWh and 2.5 MW.

The inception-to-date results are summarized below:

- Total Incentive Budget Committed: \$7,500,000 (100% percent of total authorized budget)
- Total Estimated Energy Savings: 44,500 MWh
- Total Estimated Demand Reductions: 10.2 MW
- Twenty-six cities have completed installation representing approximately 25,400 MWh of annualized energy savings and 5.7 MW of peak demand reduction.

Although this Summer Initiative program is fully committed, SCE will continue a similar offering to cities through SCE's Express Efficiency Rebate program in 2002. Express Efficiency will continue to offer cities financial incentives, up to 50 percent of estimated hardware costs, to encourage the installation of LED traffic signals.

Campus Energy Efficiency Project

Program Element Summary

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

The \$3.5 million incentive budget allocated to this program is split between the two campuses based on the projected energy savings. Incentives through this program will be paid to the respective campuses in increments of 50 percent up front, 40 percent at project completion and 10 percent upon delivery of a final project report. The final report will be used to report the results of the project and will include such information as project costs and actual per unit demand and energy savings.

Activities, Accomplishment, Market Progress, & Modifications

The Cal Poly Pomona and Cal State Long Beach projects were completed prior to June 1, 2001. The total savings for these two projects is 7,423 MWh of annualized energy savings with 2.3 MW of demand reduction. Both organizations have submitted its final report and all funds have been distributed.

Hard to Reach Program

Program Element Summary

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

Activities, Accomplishment, Market Progress, & Modifications

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

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

By February 2001, total program funds of \$2.6 million were subscribed with 10 contractors. The 10 contracts propose measures in lighting, duct testing and sealing, weatherstripping, water heater blankets, aerators and low-flow showerheads. As of the end of September 2001, 65% of the program budget had been paid to the project participants. That represents approximately 9,731 MWh of annualized energy savings and peak demand reduction of 4.7 MW.

Beat the Heat

Program Element Summary

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

Activities, Accomplishment, Market Progress, & Modifications

On September 4, 2001, Ecos Consulting submitted a report to the ALJ stating that they were not successful in meeting their goal and no energy efficient torchieres were installed in SCE's service territory as a result of Beat The Heat. SCE recommended that the remaining funds be transferred into the 2001 energy efficiency budget.

SCE's request to transfer funds was rejected. On September 26, 2001, the ALJ ruled that Ecos and SCE shall work to develop and implement torchiere programs. SCE took the lead role in directing the program. Ecos Consulting was directed by SCE to do a direct marketing approach to senior assisted living facilities.

COPE

Program Element Summary

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

Activities, Accomplishment, Market Progress, & Modifications

- 13 COPE members participated in the program, with seven companies doing projects in the PG&E service area, seven other companies doing projects in the SCE area, and one company had projects in both service areas.
- COPE members completed 33 projects at 570 sites, with 9 projects in the PG&E service area and 24 projects in the SCE area.
- Projects included pump off controllers (18), variable frequency drives (3), timer installation (1), pump optimization (5), plant facilities (4) and motor right sizing (2).
- Total incentives (excluding COPE's administrative costs) are \$1.6 million for PG&E projects and \$1.2 million for SCE projects.
- Estimated energy savings are 16.9 million kWh and 1,928 kW for the PG&E projects, and 12.3 million and 1,407 kW for the SCE projects. Total estimated energy savings are 29.2 million kWh and 3,335 kW (3.3 MW).
- Original projections were 34 million kWh and 4.6 MW.
- Total contract spending is expected to be \$3,500,000 compared to the budget of \$4,000,000.

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

Program	2000/2001 Authorized Budget	Inception-to-Date			
		Expenditures			
		Actual	Commitment	Total Actual + Committed	Utility Administrative Costs ^[1]
Beat The Heat	\$ 250,000	250,000	-	250,000	9,418
Residential Refrigerator Recycling	1,200,000	1,200,000	-	1,200,000	405,469
Pool Efficiency Program	3,000,000	1,827,627	1,172,373	3,000,000	353,323
Campus Energy Efficiency Programs [1]	3,500,000	2,235,670	1,264,330	3,500,000	5,669
Residential Hard To Reach	2,600,000	1,595,136	1,004,864	2,600,000	76,558
LED Traffic Signal Rebate Program	7,500,000	4,282,124	3,217,876	7,500,000	60,069
COPE	1,500,000		1,500,000	1,500,000	13,109
TPI Solicitation Process	1,700,000	774,484	925,516	1,700,000	41,956
Total	\$ 21,250,000	\$ 12,165,041	\$ 9,084,959	\$ 21,250,000	\$ 965,571

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

Table 8.2
Summer Initiative Programs
Budget and Expenditures - Inception-to-Date
PY 2001

Program	Inception-to-Date					
	Actual		Committed		Total	
	Energy Savings (MWh)	Demand Reductions (MW)	Energy Savings (MWh)	Demand Reductions (MW)	Energy Savings (MWh)	Demand Reductions (MW)
Beat The Heat	-	-	-	-	-	-
Residential Refrigerator Recycling	14,038	2.40	-	-	14,038	2.40
Pool Efficiency Program	1,494	28.58	1,652	13.07	3,146	41.65
Campus Energy Efficiency Programs [1]	7,423	2.32	-	-	7,423	2.32
Residential Hard To Reach	9,731	4.70	5,269	2.60	15,000	7.30
LED Traffic Signal Rebate Program	25,424	5.70	8,761	1.90	34,185	7.60
COPE	7,423	2.30	-	-	7,423	2.30
TPI Solicitation Process	2,120	0.69	-	-	3,479	2.40
Total	67,653	46.69	15,682	17.57	84,694	65.97

Section 9: General Compliance Issues

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

Decision 00-07-017 - Quarterly Reporting Requirements

Ordering Paragraph 21:

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

Response:

In 2001, the Commission is holding a series of “all hands” meeting to discuss the status of energy efficiency programs. These meeting were held on March 2, 2001, April 19, 2001, and July 13, 2001. At these public-held meetings, SCE presented the status of RCP along with specific programmatic modifications to RCP for 2001.

Ordering Paragraph 29:

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

Response:

A summary of the statewide lighting and appliance program activities is presented in the Statewide and Crosscutting Section of this report.

Ordering Paragraph 33:

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

Response:

The status report on the school-based education programs is presented under the Residential Audit program discussed earlier in this report (See, Residential Program Area). On August 31, 2001, SCE submitted to the Energy Division an evaluation report on its school-based education programs. (See, *Southern California Edison Evaluation of 2000-2001 School Programs*, August 31, 2001)

Ordering Paragraph 37:

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

Response:

The progress on meeting the needs of hard-to-reach residential customers is described under the Residential program area.

Ordering Paragraph 42:

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

Response:

The progress on meeting the needs of small and medium nonresidential customers is described under the Small Nonresidential Comprehensive Retrofit program results (See, Nonresidential Program Area).

Ordering Paragraph 50:

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

Response:

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

Ordering Paragraph 66:

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

Response:

The progress on meeting the needs of small and medium nonresidential customers is described under the Small Nonresidential Comprehensive Retrofit program results (See, Nonresidential Program Area).

Ordering Paragraph 68:

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

Response:

The progress on the distribution of both Residential and Business Energy Guides are described in the Residential and Nonresidential Mass Market Information program (See, Nonresidential and Residential Program Areas).

Ordering Paragraph 70:

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

Response:

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

Ordering Paragraph 75:

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

Response:

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

Ordering Paragraph 88:

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

Response:

The Commission has created monthly “all hands meeting” to discuss the progress of the 2001 energy efficiency programs. The Commission held meetings on March 2, 2001, April 19, 2001, and July 13, 2001. At these meetings, SCE presented its 2001 program modification and year-to-date program performance. These program modifications are shown in the program summary sections to this report.

Ordering Paragraph 91:

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

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

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

Response:

After discussion with each of the utilities and the Energy Division on the content and format of the Quarterly Report and compliance with Ordering Paragraph 91, SCE submits this 3rd Quarter Report on the 2001 energy efficiency programs.

Ruling On Cost Effectiveness Issues For PY 2001 Programs

Dated: October 25, 2000

Direction (pp.22-23):

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

Report. The utilities should update the saturation data in each quarterly report and the Annual Report.

Response:

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

Ruling On Summer 2000 Energy Efficiency Initiative

Dated: September 7, 2000

Direction (p.7):

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

Response:

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

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

Dated: August 21, 2000

Direction (p.7):

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

Response:

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