

May 20, 2002

Docket Clerk  
California Public Utilities Commission  
505 Van Ness Avenue  
San Francisco, CA 94102

Re: **Southern California Edison Company's 2002  
Statewide Program Implementation Plans**

Dear Docket Clerk:

In compliance with Ordering Paragraph 2 of Decision 02-03-056, enclosed for filing with the Commission are 1 original and 5 copies of Southern California Edison Company's Implementation Plans for each of the funded statewide energy efficiency programs for 2002. These Plans have also been posted on our website.

We request that a copy of this document be file-stamped and returned for our records. A self-addressed, stamped envelope is enclosed for your convenience.

Your courtesy in this matter is appreciated.

Very truly yours,

Christa Piantadosi

cc: Service List - R.01-08-028 (e-mail service only)

CP:jr:Cvr Ltr PIP 5\_20\_02.doc

Enclosure(s) – Southern California Edison Company's 2002 Statewide Program Implementation Plans.

Rulemaking No.: 01-08-028



(U 338-E)

***Southern California Edison Company's  
2002 Statewide Program Implementation Plans***

May 20, 2002

# **Southern California Edison Company's 2002 Statewide Program Implementation Plans**

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# Residential Appliance Recycling Implementation Plan

## 1. Title of Individual Program

Residential Appliance Recycling

## 2. Plans to Implement this Decision's Changes to Original Proposals

### 2.1 Program Overview

The Statewide Residential Appliance Recycling Program (RARP) program is designed to reduce energy usage by allowing eligible customers (single family and multifamily owners/landlords and tenants) to dispose of their operable, inefficient primary and secondary refrigerators and freezers in an environmentally safe manner. The program is offered to customers within the service territories of Pacific Gas and Electric (PG&E), Southern California Edison (SCE), and San Diego Gas & Electric (SDG&E).

### 2.2 Objectives

The primary objectives of this program are:

- Decrease the retention of high energy-usage refrigerators;
- Deliver long-term energy savings and peak demand reduction; and
- Increase hard-to-reach customer participation by strategically targeting, for example, geographic locations.

### 2.3 Implementation

**Overview:** The program is on a first-come, first serve basis and is available April 1 through December 31, 2002 or until funds are spent, whichever comes first. Qualifying refrigerators or freezers must be working (cooling) and be between 10-27 cubic feet. Customers may turn in no more than two refrigerators or freezers or combination of one refrigerator and freezer per year per dwelling unit.

RARP offers a recycling incentive of \$35 or a five-pack of compact fluorescent lamps (CFLs). The customer is asked when the pickup is scheduled to choose an incentive. If the \$35 incentive is chosen, the customer receives a check from the vendor 6 – 8 weeks after the pickup. The CFL five-pack is provided to the customer at the time of pick-up.

The targeted market segment is residential customers, with an emphasis on the hard-to-reach (HTR) as defined by the California Public Utilities Commission (CPUC) in its Energy Efficiency Policy Manual. The program does allow other non-HTR customers to participate in the program.

**Operation:** The RARP's recycling vendor, Appliance Recycling Centers of America, Inc. (ARCA) is responsible for operating its Compton recycling facility, including but not limited to, the recycling process of dismantling the units and removing refrigerants, scheduling and performing refrigerator and freezer pickups. ARCA is responsible for meeting the comprehensive toxic material recycling and disposal standards in conformance with California environmental laws and regulations and permitting requirements. To schedule a refrigerator or freezer pickup, the program will provide customers a toll free telephone number or web site address. Each investor-owned utility (IOU) will coordinate development of a website to allow customers to electronically sign-up to the program.

**Marketing:** The program will advertise and market to customers within each of the IOU's service territory with an emphasis on hard-to-reach customer groups. ARCA will be exclusively responsible for preparing and implementing all marketing activities in PG&E and SDG&E's service territories. The program may also leverage the integration of other statewide and outreach campaigns such as those that offer information and education, e.g., Univision.

**Outreach:** The IOUs will ensure accurate RARP information on their respective websites and through their phone centers. The program, if feasible, will also leverage the integration of other energy efficiency programs such as those that offer information, education and information connections through various crosscutting program activities.

**Administration:** By CPUC directive, SCE will serve as the administrator to oversee the program statewide. Per this directive, PG&E and SDG&E will also transfer program funds to SCE for payment purposes.

**Tracking and Reporting:** The program tracking systems will monitor and report program activity. Program tracking will include units recycled, expenditures, and energy savings. SCE, as administrator, will report such data to the CPUC on its prescribed timeline. SCE will also periodically report respective program activity to PG&E and SDG&E.

### **3. Energy and Peak Demand Savings Targets**

The following matrix identifies the unit count, energy savings and demand reduction targets for the 2002 Statewide Residential Appliance Recycling program. The unit count target is consistent with the CPUC's target set forth in Decision 02-03-056. However, the CPUC incorrectly listed the energy savings and demand reduction targets in gross figures. The targets shown below reflect net targets using a 0.80 net-to-gross ratio (refrigerators, freezers only) as required by the CPUC's Energy Efficiency Policy Manual.

Due to the abovementioned administrative structure of this statewide program, the targets are not the responsibility of SDG&E or PG&E rather the responsibility of the prime vendor.

### Recycled Refrigerators/Freezers

Measure	Unit Defined	Forecast Units	Total Net kWh	Net kWh per unit	Total Net kW	Net kW per unit
Refrigerators	Unit	17,096	29,377,766	1,718	4,513	0.26
Screw-in CFL 15W	Unit	4,274	136,768	32	21	0.01
Screw-in CFL 20W	Unit	2,137	108,987	51	17	0.01
Screw-in CFL 23W	Unit	4,274	200,878	47	32	0.01
Freezers	Unit	4,274	7,036,714	1,646	1,060	0.25
<b>Total</b>			<b>36,861,113</b>		<b>5,643</b>	

\*0.80 Net-to-Gross for Refrigerators and Freezers: 1.0 Net-to-Gross for 5-pack CFLs. It appears the CPUC targets for kWh and kW, shown in D.02-03-056, are listed as gross energy targets.

#### 4. Cost Effectiveness

	Program Benefits	Program Costs	Net Benefits	Benefit/Cost Ratio
<b>Total Resource Cost Test</b>	\$13,892,000	\$2,848,501	\$11,043,499	4.88
<b>Participant Cost Test</b>	\$17,253,501	2,103,000	15,150,501	8.20

#### 5. Evaluating Program Progress For Information-only Programs

Section is not applicable to this non-information program.

#### 6. Hard-to-reach Targets

In 2002, 49% of the units collected in SCE's service territory will be from "hard-to-reach" geographic areas defined as rural, moderate income and/or multifamily. In 2001, 54.01% of the units collected in SCE's service territory were from these HTR geographic areas.

#### 7. Budgets

<b>Program</b>	<b>2002 Budget</b>
Residential Appliance Recycling Program	<b>\$4,000,000</b>

Notes:

Program budget does not include EM&V activities funded from the statewide EM&V budget. See, Attachment B for a detailed budget.

## **8. Payment Schedule**

The CPUC has adopted this program for the remaining nine months of calendar year 2002 thus the payment of funds to the sponsoring utility will be collected during the second, third and fourth quarter of 2002. This payment schedule is abbreviated from the two-year schedule outlined in CPUC's Energy Efficiency Policy Manual in recognition of the program's limited nine-month implementation period.





**Attachment A: Measure Forecast Table**

<b>Measure</b>	<b>Unit Defined</b>	<b>Forecast Units</b>	<b>Rebate per unit</b>	<b>Total Rebate</b>
Refrigerators	Unit	17,096	\$155	\$2,641,332
Screw-in CFL 15W	Unit	4,274	\$6	\$23,934
Screw-in CFL 20W	Unit	2,137	\$6	\$11,967
Screw-in CFL 23W	Unit	4,274	\$6	\$23,934
Freezers	Unit	4,274	\$155	\$660,333
<b>Total</b>				<b>\$3,361,501</b>

Note:

Rebate per unit of \$155 is an average cost based upon \$123 recycling cost, \$35 customer incentive, and 90% customer selection of incentive instead of CFL pack.

# **Attachment B: Program Budget**

**SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL APPLIANCE RECYCLING**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	\$ 173,300		4.3%
Benefits	57,700		1.4%
Travel/Conference/Training	2,200		0.1%
Reporting/Tracking/Development - Information Services	30,000		0.8%
Materials & Handling	15,200		0.4%
Overhead and General and Administrative costs	188,300		4.7%
Subcontractor Administrative costs	-		0.0%
<b>Total Administrative Costs</b>	<b>466,700</b>		<b>11.7%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>210,000</b>		<b>5.3%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	3,361,500		84.0%
Installation costs	-		0.0%
Activity costs	-		0.0%
Rebate Processing/Inspection	19,500		0.5%
<b>Total Direct Implementation costs</b>	<b>3,381,000</b>		<b>84.5%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>107,000</b>		<b>2.7%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(164,700)		-4.1%
	-		0.0%
<b>Budget Grand Total</b>	<b>\$ 4,000,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, etc. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

**SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL APPLIANCE RECYCLING**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
<b>Labor</b>			
Type A - Program Planning/Design/Program Mgmt.	\$ 137,700		3.4%
Type B - Mgmt./Supervisor	35,600		0.9%
Type C - Clerical Support			0.0%
Subtotal Labor	173,300		4.3%
<b>Benefits</b>			
Pensions & Benefits	50,100	48.6% of SCE Labor	1.3%
Payroll Taxes	7,600	7.4% of SCE Labor	0.2%
Subtotal Benefits	57,700		1.4%
<b>Travel/Conference/Training</b>			
Type A - Mileage and Parking	1,000		0.0%
Type B - Other - Meals, lodging, misc. expenses	-		0.0%
Type C - Conference/Training Activities	1,200		0.0%
Subtotal Travel costs	2,200		0.1%
<b>Reporting/Tracking/Development - Information Services</b>	30,000		0.8%
<b>Materials &amp; Handling</b>	5,200		0.1%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	59,100		1.5%
Type B - Accounting Support	44,600		1.1%
Type C - Communications/Telecommunications/Automated Systems Support	66,300		1.7%
Type D - Human Resources Support	17,300		0.4%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	1,000		0.0%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	188,300		4.7%
<b>Subcontractor Administrative costs (administrative only, report other subcontractor costs in the appropriate category)</b>			
Labor			0.0%
Benefits			0.0%
Overhead			0.0%
Travel costs			0.0%
Reporting costs			0.0%
Materials & Handling			0.0%
Overhead and General and Administrative costs			0.0%
Subtotal Subcontractor Administrative costs	-		0.0%
Profit			0.0%
<b>Total Administrative Costs</b>	<b>456,700</b>		<b>11.4%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
Type A - Brochures/Booklets	10,000		0.3%
Type B - Media Support	200,000		5.0%
Type C - Outreach	-		0.0%
Total Marketing/Advertising/Outreach Costs	210,000		5.3%

**SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL APPLIANCE RECYCLING, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>			
See, Attachment A, Measure Forecast Table	3,361,500		84.0%
Subtotal Financial Incentives	3,361,500		84.0%
<b>Itemized installation costs</b>			0.0%
Subtotal Installation costs	-		0.0%
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>			
<b>Itemized activity costs</b>			
Subtotal Activity costs	-		0.0%
<b>Rebate Processing/Inspection</b>			
E.E. Call Center	19,500		0.5%
Subtotal Rebate Processing/Inspection costs	19,500		0.5%
<b>Total Direct Implementation costs</b>	<b>3,381,000</b>		<b>84.5%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			
EM&V labor			0.0%
Subtotal EM&V Labor	-		0.0%
<b>Benefits</b>			
Pensions & Benefits			0.0%
Payroll Taxes			0.0%
Subtotal Benefits	-		0.0%
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking			0.0%
Type B - Other - Meals, lodging, misc. expenses			0.0%
Type C - Conference/Training Activities			0.0%
Subtotal Travel Costs	-		0.0%
<b>Reporting costs</b>			
Report 1 (consultant cost)			0.0%
Report 2 (consultant cost)			0.0%
Subtotal EM&V Reporting Costs	-		0.0%
<b>Materials &amp; Handling</b>			
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support			0.0%
Type B - Accounting Support			0.0%
Type C - Communications/Telecommunications/Automated Systems Support			0.0%
Type D - Human Resources Support			0.0%
Type E - Facilities Support			0.0%
Type F - Supervision			0.0%
Type G - Corporate Services			0.0%
Type H - Transportation Services, Shop Services			0.0%
Type I - Information Technology			0.0%
Type J - Procurement and Material Management			0.0%
Subtotal Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>107,000</b>		<b>2.7%</b>

SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL APPLIANCE RECYCLING, Cont'd

Program Budget Detail

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
<b>Itemized, may include:</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(164,700)		-4.1%
<b>Budget Grand Total</b>	<b>\$ 4,000,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, and the Standard Practice Manual. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.





# Single Family Home Energy Efficiency Rebates Implementation Plan

## 1. Title of Individual Program

Single Family Home Energy Efficiency Rebates

## 2. Plans to Implement this Decision's Changes to Original Proposals

### 2.1 Program Summary

#### Program Description

##### Program Specifics:

This proposal seeks funding for the Single Family Home Energy Efficiency Rebates Program in the statewide residential category. The total 2002 budget for Pacific Gas and Electric (PG&E) Company's program is \$12,816,000, Southern California Edison (SCE) \$5,850,000, San Diego Gas and Electric (SDG&E) \$3,197,000, and Southern California Gas Company (SCG) \$2,598,000 to be funded by electric and gas public goods charges. The target market segments to be included in this program are retrofit and renovation, appliances, heating and cooling. This program will be delivered through a prescriptive rebate per unit for qualified energy efficiency measures. This program will also target hard-to-reach (HTR) customers as defined in the California Public Utilities Commission's (CPUC) Policy Manual; however, the utilities will not prevent other non-HTR customers from participation in the program.

This statewide program is designed to provide consistency among the four California investor-owned-utilities (IOUs) in adopting the CPUC's final decision for the program. The statewide programs are consistent in incentive levels, application procedures and program implementation. As such, IOU Single Family programs will reflect changes to rebate offerings in response to the CPUC's final decision in an effort to maintain consistency among utility programs, municipalities and state agencies, and achievement of the changed energy savings targets. The unique service areas and geographical variation of each IOU dictate actual per measure rebate demands from customers and varied overall energy savings for certain measures. IOUs have not placed any limits on the number of rebates per measure that can be requested by customers. That, combined with the desire to develop consistent prescriptive rebate amounts, will cause net energy savings on a per measure basis to differ slightly among IOUs.

##### Program Description:

This program builds on the highly successful residential rebate programs offered by the four IOUs in 2001. The 2002 program promotes energy efficiency retrofits within the residential sector through an integrated approach combining broader distribution of information and direct customer rebates to stimulate customer action.

Energy efficiency and rebate information are provided through a variety of means, including: customer communications, toll free consumer service, IOU websites, as well as retailers. Additionally, direct outreach to diverse, hard-to-reach customer markets and referrals from other utility operated programs will help to attract new customers to this program. Finally, when the customer is ready to invest in energy efficient equipment, direct rebates are available to help offset the higher cost of purchasing high efficiency equipment. The Program offers a broad list of statewide energy efficiency measures with prescribed rebates to encourage customer adoption of comprehensive multi-measure projects. The measures offered are also the same as those available for tenant unit improvements under the Statewide Multifamily Energy Efficiency Rebate Program for consistency.

## **2.2 Implementation**

### Marketing and Outreach

The IOUs will work with local retailers and distributors, as well as manufacturer partners to maximize effectiveness with consumers. In addition, IOUs will leverage with the Energy Star® Change Campaign, the Flex Your Power Campaign, and other promotional campaign efforts to ensure reinforcement of the energy efficiency and energy savings message.

Program information will be communicated to consumers via a multi-pronged approach:

- Consumer information and educational materials,
- Direct customer support through toll-free customer service and utility websites,
- Coordinated marketing and outreach through retail and field support, and
- Leveraging other utility and non-utility programs.

Program information will be disseminated through bill inserts, energy events for consumers, trade ally communications, and through IOU staff that engage in customer contact.

- The program will also be promoted through field support to the appliance, lighting, home improvement, and large box wholesale stores. The field support may include signing up participating stores with an agreement contract, training retailer staff on rebate promotions, and ensuring marketing materials are posted in the stores. The IOUs will also coordinate with retailers to provide point of purchase marketing materials and seasonal advertising promotions.
- Additional marketing and outreach will be achieved through contractor and other energy professional dissemination of energy efficiency information and promotion of available programs to consumers.
- Finally, the Program will be used to “cross-reference” other customer programs, including the low-income energy efficiency and rate discount programs, and will leverage marketing messages to the widest customer audience.

### Synergies and Coordination

- To achieve maximum synergy, the timing of rebate promotion cycle, advertising and product promotion will be consistent throughout the state. This approach not only assures optimum use of advertising resources reaching customers throughout the state, but also helps major retailers and manufacturers plan product shipment to meet projected demand in the market place. Additionally, the timing of rebates and promotions will coincide with the Statewide Marketing and Outreach Campaign. This goal is to provide customers with a focused and consistent message statewide.
- The 2002 Home Energy Efficiency Rebate Program will also be coordinated with other IOU programs, including the statewide Multifamily Energy Efficiency Rebate Program, local HTR programs, and Low-Income programs. The coordination will ensure consistency of the energy efficiency message and leverage marketing and advertising resources where possible.

### 3. Energy and Peak Demand Savings Targets

Measure	Unit Defined	Forecast Units	Total Net kWh	Net kWh per unit	Total Net kW	Net kW per unit
Pool Pump & Motor	site	9,100	12,754,560	1,402	1,820	0.20
Room A/C - 5,000 to 18,000	Unit	250	25,400	102	29	0.12
High Performance Window	sq. ft.	500,000	641,776	1	633	0.00
Programmable Thermostat	unit	5,000	1,305,583	261	534	0.11
Attic Insulation	sq. ft.	1,000,000	27,083	0	21	0.00
Wall Insulation	sq. ft.	500,000	20,542	0	31	0.00
Whole House Fan	unit	5,000	1,010,638	202	130	0.03
Evaporative Cooler	unit	500	604,896	1,210	663	1.33
Central AC - SEER 12	unit	5,000	1,564,731	313	1,914	0.38
Central AC - Tier I	unit	2,000	704,658	352	1,327	0.66
Central AC - Tier II	unit	1,000	390,877	391	803	0.80
Central AC - Tier III	unit	500	240,495	481	452	0.90
Central Heat Pump - SEER 12	unit	100	31,506	315	64	0.64
Central Heat Pump - Tier I	unit	250	117,164	469	145	0.58
Central Heat Pump - Tier II	unit	40	29,536	738	27	0.68
Central Heat Pump - Tier III	unit	15	14,077	938	13	0.85
<b>Total</b>			<b>19,483,521</b>		<b>8,606</b>	

Note –

The energy savings and demand reduction forecasts may differ from the CPUC adopted targets listed in Decision 02-03-056.

**4. Cost-Effectiveness**

	<b>Program Benefits</b>	<b>Program Costs</b>	<b>Net Benefits</b>	<b>Benefit/Cost Ratio</b>
<b>Total Resource Cost Test</b>	\$13,794,000	\$13,214,719	\$579,281	1.04
<b>Participant Cost Test</b>	\$17,363,750	10,731,000	6,632,750	1.62

**4. Evaluating Program Progress For Information-only Programs**

Section is not applicable to this non-information program.

**6. Hard-to-Reach Targets**

SCE had 12% of 2001 paid and committed single family rebate applications from hard-to-reach geographic areas. The 2002 target is that 14% (i.e., 1.2 times the 2001 percentage) of Statewide Home Energy Efficiency Rebate applications come from these hard-to-reach geographic areas.

**7. Budget**

<b>Program</b>	<b>2002 Budget</b>
Single Family Home Energy Efficiency Rebate Program	<b>\$5,850,000</b>

Notes:

Program budget does not include EM&V activities funded from the statewide EM&V budget. See, Attachment B for a detailed budget.

**8. Payment Schedule**

The CPUC has adopted this program for the remaining nine months of calendar year 2002 thus the payment of funds to the sponsoring utility will be collected during the second, third and fourth quarter of 2002. This payment schedule is abbreviated from the two-year schedule outlined in CPUC's Energy Efficiency Policy Manual in recognition of the program's limited nine-month implementation period.

# **Attachment A: Measure Forecast Table**

<b>Measure</b>	<b>Unit Defined</b>	<b>Forecast Units</b>	<b>Rebate per unit</b>	<b>Total Rebate</b>
Pool Pump & Motor	site	9,100	\$100	\$910,000
Room A/C - 5,000 to 18,000	Unit	250	\$50	\$12,500
High Performance Window	sq. ft.	500,000	\$0.50	\$250,000
Programmable Thermostat	unit	5,000	\$20	\$100,000
Attic Insulation	sq. ft.	1,000,000	\$0.15	\$150,000
Wall Insulation	sq. ft.	500,000	\$0.15	\$75,000
Whole House Fan	unit	5,000	\$75	\$375,000
Evaporative Cooler	unit	500	\$300	\$150,000
Central AC - SEER 12	unit	5,000	\$100	\$500,000
Central AC - Tier I	unit	2,000	\$200	\$400,000
Central AC - Tier II	unit	1,000	\$325	\$325,000
Central AC - Tier III	unit	500	\$425	\$212,500
Central Heat Pump - SEER 12	unit	100	\$175	\$17,500
Central Heat Pump - Tier I	unit	250	\$275	\$68,750
Central Heat Pump - Tier II	unit	40	\$400	\$16,000
Central Heat Pump - Tier III	unit	15	\$500	\$7,500
<b>Total</b>				<b>\$3,569,750</b>

# **Attachment B: Program Budget**

**SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL SINGLE FAMILY REBATES**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	319,800		5.5%
Benefits	206,800		3.5%
Travel/Conference/Training	16,700		0.3%
Reporting/Tracking/Development - Information Services	220,000		3.8%
Materials & Handling	189,100		3.2%
Overhead and General and Administrative costs	303,900		5.2%
Subcontractor Administrative costs	-		0.0%
<b>Total Administrative Costs</b>	<b>1,256,300</b>		<b>21.5%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>360,000</b>		<b>6.2%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	3,570,000		61.0%
Installation costs	-		0.0%
Activity costs	135,000		2.3%
Rebate Processing/Inspection	735,500		12.6%
<b>Total Direct Implementation costs</b>	<b>4,440,500</b>		<b>75.9%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>203,000</b>		<b>3.5%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(409,800)		-7.0%
<b>Budget Grand Total</b>	<b>5,850,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, etc. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.



**SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL SINGLE FAMILY REBATES**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
<b>Labor</b>			
Type A - Program Planning/Design/Program Mgmt.	\$ 190,000		3.2%
Type B - Mgmt./Supervisor	119,400		2.0%
Type C - Clerical Support	10,400		0.2%
Subtotal Labor	319,800		5.5%
<b>Benefits</b>			
Pensions & Benefits	179,500	48.6% of SCE Labor	3.1%
Payroll Taxes	27,300	7.4% of SCE Labor	0.5%
Subtotal Benefits	206,800		3.5%
<b>Travel/Conference/Training</b>			
Type A - Mileage and Parking	4,700		0.1%
Type B - Other - Meals, lodging, misc. expenses	8,000		0.1%
Type C - Conference/Training Activities	4,000		0.1%
Subtotal Travel costs	16,700		0.3%
<b>Reporting/Tracking/Development - Information Services</b>	220,000		3.8%
<b>Materials &amp; Handling</b>	189,100		3.2%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	86,500		1.5%
Type B - Accounting Support	65,200		1.1%
Type C - Communications/Telecommunications/Automated Systems Support	97,000		1.7%
Type D - Human Resources Support	25,200		0.4%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	30,000		0.5%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	303,900		5.2%
<b>Subcontractor Administrative costs (administrative only, report other subcontractor costs in the appropriate category)</b>			
Labor	-		0.0%
Benefits	-		0.0%
Overhead	-		0.0%
Travel costs	-		0.0%
Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
Subtotal Subcontractor Administrative costs	-		0.0%
Profit	-		0.0%
<b>Total Administrative Costs</b>	<b>1,256,300</b>		<b>21.5%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
Type A - Brochures/Booklets	110,000		1.9%
Type B - Media Support	250,000		4.3%
Type C - Outreach	-		0.0%
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>360,000</b>		<b>6.2%</b>

**SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL SINGLE FAMILY REBATES, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>			
See, Attachment A, Measure Forecast Table	3,570,000		61.0%
Subtotal Financial Incentives	3,570,000		61.0%
<b>Itemized installation costs</b>			
Subtotal Installation costs	-		0.0%
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>			
<b>Itemized activity costs</b>			
Engineering Analysis	135,000		2.3%
Subtotal Activity costs	135,000		2.3%
<b>Rebate Processing/Inspection</b>			
Process 30,000 applications @ \$14 each	415,500		7.1%
Long Beach EE Phone Center	320,000		5.5%
Subtotal Rebate Processing/Inspection costs	735,500		12.6%
<b>Total Direct Implementation costs</b>	<b>4,440,500</b>		<b>75.9%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			
EM&V labor	-		0.0%
Subtotal EM&V Labor	-		0.0%
<b>Benefits</b>			
Pensions & Benefits	-		0.0%
Payroll Taxes	-		0.0%
Subtotal Benefits	-		0.0%
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking	-		0.0%
Type B - Other - Meals, lodging, misc. expenses	-		0.0%
Type C - Conference/Training Activities	-		0.0%
Subtotal Travel Costs	-		0.0%
<b>Reporting costs</b>			
Report 1 (consultant cost)	-		0.0%
Report 2 (consultant cost)	-		0.0%
Subtotal EM&V Reporting Costs	-		0.0%
<b>Materials &amp; Handling</b>			
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	-		0.0%
Type B - Accounting Support	-		0.0%
Type C - Communications/Telecommunications/Automated Systems Support	-		0.0%
Type D - Human Resources Support	-		0.0%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	-		0.0%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>203,000</b>		<b>3.5%</b>

SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL SINGLE FAMILY REBATES, Cont'd

Program Budget Detail

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
Itemized, may include:			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(409,800)		-7.0%
<b>Budget Grand Total</b>	<b>\$ 5,850,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements

Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

# Multifamily Energy Efficiency Rebates Implementation Plan

## 1. Title of Individual Program

Multifamily Energy Efficiency Rebates

## 2. Plans to Implement this Decision's Changes to Original Proposals

### 2.1 Program Summary

Program Objectives and Description

Program Specifics:

The Statewide Multifamily Energy Efficiency Rebate program (MFEERP) is funded by electric and natural gas public goods charges in the statewide residential category. The investor-owned utilities' (IOUs) authorized 2002 program budgets are Pacific Gas and Electric Company - \$3,304,000; Southern California Edison - \$2,000,000; San Diego Gas and Electric - \$1,500,000; and Southern California Gas Company - \$1,500,000. This program will provide a prescriptive rebate for qualified energy efficiency measures and will target the existing residential multifamily market sector, reaching out to hard-to-reach (HTR) customers as defined in the Commission's *Energy Efficiency Policy Manual*. The program is uniform throughout all the IOUs' service areas, with consistent terms and requirements and implementation characteristics, including rebate levels and application procedures.

### Program Objectives

The program's primary objectives are:

Long-Term Energy Savings and Peak Demand Reduction: The MFEERP will deliver sustained long-term energy savings resulting from customers' energy efficiency equipment investment choices; aided by customers' heightened awareness of energy efficiency options; and new, effective technologies with higher performance.

Equity:

Program emphasis is on multifamily HTR customers who traditionally have not actively participated in energy efficiency programs due to various barriers, e.g., split incentives or geographic location.

### Program Description

The MFEERP is designed for multifamily residential customers who have not traditionally nor actively participated in energy efficiency programs. Rebates are available to multifamily owners/landlords, homeowners associations, and mobile home customers of master-metered and individually metered accounts. Owners/landlords need only make a qualifying purchase, install the measure or have the measure installed, obtain an application from any one of a variety of

sources, complete and return it with required supporting documentation to the corresponding IOU for processing. This program uses an integrated approach combining customer rebates, information, education, and energy management services to stimulate customer action. Energy efficiency and rebate information are provided through various channels, for example: the IOUs' customer information lines; Web sites; direct mail and online energy audits; and local groups such as ethnic, trade, community, and apartment associations that specifically target the HTR.

The MFEERP offers a broad list of qualifying energy efficiency measures with prescribed rebates to encourage customer adoption of comprehensive multi-measure projects. Several measures are the same as those available under the Statewide Single-Family Rebate program. Other measures are offered for common area and dwelling unit energy efficient improvement, some with rebate levels set to encourage owners/landlords to retrofit tenant units. This design is intended to generate market response, achieve greater penetration in multifamily complexes, and motivate owners/landlords to provide energy efficient, energy saving measures to the HTR tenant sector.

The MREEFP introduces customer-driven participation with prescribed rebates and an application process compared to the 2001 multifamily contractor-delivered and calculated or measured savings payment approach. This program focuses on paying rebates to owners/landlords of multi-dwelling complexes. Owners/landlords may designate the installation contractor as the recipient of the approved rebate payment.

## **2.2 Implementation**

### **Marketing and Outreach**

The MFEERP will leverage the integration of statewide marketing and outreach campaigns such as those that offer information and education, i.e., Univision. The IOUs will synchronize with the State of California's "Flex Your Power" campaign and pursue additional advertising venues, e.g., trade ally magazines and radio public service announcements.

The IOUs plan to provide energy efficiency information and encourage customers to find ways to save money on their energy bills. Energy efficiency and program information will be disseminated through delivery channels such as advertising, monthly bill packets, energy fairs, speaker events, trade ally communications, IOU collateral materials and customer information lines, Web sites, other utility programs, direct mail campaign(s) targeted at zip code communities with HTR populations, and utility and local HTR implementers.

The IOUs will focus their marketing and outreach efforts with local ethnic, trade, community and/or apartment associations. Other targeted efforts may include cities, Department of Housing and Urban Development (HUD), community based organizations (CBOs), mobile home associations, property management companies, and local government agencies. While HTR is emphasized, the program is open to all multifamily owners/landlords. The IOUs will cross-reference other energy efficiency programs including the low-income energy efficiency programs administered by the IOUs.

### **Synergies and Coordination**

To achieve maximum synergy and provide customers with a focused and consistent message statewide, the timing of rebates and product delivery, as well as advertising promotions, will be consistent throughout the state. This approach assures optimum use of advertising resources, and it also helps major retailers and manufacturers plan product shipment to meet marketplace demand. The timing of rebates and promotions will coincide with the Statewide Marketing and Outreach Campaign.

The MFEERP will also coordinate with other IOU programs, including the statewide Single-Family Rebate program and Low-Income Energy Efficiency programs. The coordination will ensure a consistent energy efficiency message and leverage marketing and advertising resources where possible. Furthermore, the utilities will track and monitor program participation to minimize double dipping.

### 3. Energy and Peak Demand Savings Targets

Measure	Unit Defined	Forecast Units	Total Net kWh	Net kWh per unit	Total Net kW	Net kW per unit
Screw-in CFL 15 Watt-	Unit	16,000	960,000	60	64	0.00
Screw-in CFL 25 Watt-	Unit	13,000	1,549,600	119	104	0.01
Screw-in CFL 30 Watt-	Unit	10,000	1,072,000	107	72	0.01
Screw-in CFL 15 Watt-	Unit	12,000	307,200	26	48	0.00
Screw-in CFL 25 Watt-	Unit	9,000	460,800	51	72	0.01
Screw-in CFL 30 Watt-	Unit	8,000	569,600	71	90	0.01
Indoor Fixtures	Unit	10,000	712,000	71	112	0.01
Porch Light	Unit	7,500	660,000	88	0	0.00
Energy Star Ceiling Fan w/ Room A/C - 5,000 to 18,000	Unit	300	48,000	160	3	0.01
High Performance Window	sq. ft.	400	40,640	102	47	0.12
Programmable Thermostat	unit	80,100	102,812	1	101	0.00
Attic Insulation	sq. ft.	2,500	652,791	261	267	0.11
Wall Insulation	sq. ft.	80,100	2,169	0	2	0.00
Central AC - SEER 12	unit	25,000	1,027	0	2	0.00
Central AC - Tier 2	unit	2	563	313	1	0.38
Central AC - Tier I	unit	0	0	352	0	0.66
Central AC - Tier II	unit	0	0	391	0	0.80
Central AC - Tier III	unit	0	0	481	0	0.90
Central Heat Pump - SEER 12	unit	2	567	315	1	0.64
Central Heat Pump - Tier I	unit	2	844	469	1	0.58
Central Heat Pump - Tier II	unit	0	0	738	0	0.68
Central Heat Pump - Tier III	unit	0	0	938	0	0.85
Package Terminal AC (>2,	unit	50	51,141	1,023	8	0.15
Package Terminal HP	unit	50	44,545	891	29	0.59
Occupancy Sensor wall	sensor	150	12,476	83	7	0.04
Occupancy Sensor ceiling	sensor	400	33,268	83	17	0.04
Photocell	photocell	50	4,717	94	0	0.00
Exit Sign Retrofit Kit (LED)	fixture	1,200	233,892	195	27	0.02
LED Exit Sign	fixture	1,200	336,804	281	38	0.03
2.0 gpm Showerhead	Unit	150	20,105	134	0	0.00
Faucet Aerator	Unit	50	521	10	0	0.00
Turn-In-Torchiere Floor	Unit	4,500	993,600	221	0	0.00
<b>Total</b>			<b>8,871,683</b>		<b>1,113</b>	

Note:

Total net energy savings may be different from the energy savings targets provided in Decision 02-03-056.

**4. Cost-Effectiveness**

	<b>Program Benefits</b>	<b>Program Costs</b>	<b>Net Benefits</b>	<b>Benefit/Cost Ratio</b>
<b>Total Resource Cost Test</b>	\$5,115,000	\$2,149,691	\$2,965,309	2.38
<b>Participant Cost Test</b>	\$6,586,955	1,486,000	5,100,955	4.43

**5. Evaluating Program Progress For Information-only Programs**

Section is not applicable to this non-information program.

**6. Hard-to-Reach Targets**

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

**7. Budget**

<b>Program</b>	<b>2002 Budget</b>
Single Family Home Energy Efficiency Rebate Program	<b>\$2,000,000</b>

Notes:

Program budget does not include EM&V activities funded from the statewide EM&V budget.

See, Attachment B for a detailed budget.

**8. Payment Schedule**

The Commission has adopted this program for the remaining nine months of calendar year 2002, thus the payment of funds to the sponsoring utility will be collected during the second, third and fourth quarter of 2002. This payment schedule is abbreviated from the two-year schedule outlined in the Commission's Energy Efficiency Policy Manual in recognition of the program's limited nine-month implementation period.



# **Attachment A: Measure Forecast Table**

Measure	Unit Defined	Forecast Units	Rebate per unit	Total Rebate
Screw-in CFL 15 Watt-	Unit	16,000	\$2.00	\$32,000
Screw-in CFL 25 Watt-	Unit	13,000	\$2.00	\$26,000
Screw-in CFL 30 Watt-	Unit	10,000	\$2.00	\$20,000
Screw-in CFL 15 Watt-	Unit	12,000	\$2.00	\$24,000
Screw-in CFL 25 Watt-	Unit	9,000	\$2.00	\$18,000
Screw-in CFL 30 Watt-	Unit	8,000	\$2.00	\$16,000
Indoor Fixtures	Unit	10,000	\$60	\$600,000
Porch Light	Unit	7,500	\$30	\$225,000
Energy Star Ceiling Fan w/	Unit	300	\$20	\$6,000
Room A/C - 5,000 to 18,000	Unit	400	\$50	\$20,000
High Performance Window	sq. ft.	80,100	\$0.50	\$40,050
Programmable Thermostat	unit	2,500	\$20	\$50,000
Attic Insulation	sq. ft.	80,100	\$0.15	\$12,015
Wall Insulation	sq. ft.	25,000	\$0.15	\$3,750
Central AC - SEER 12	unit	2	\$100	\$180
Central AC - Tier I	unit	0	\$200	\$0
Central AC - Tier II	unit	0	\$325	\$0
Central AC - Tier III	unit	0	\$425	\$0
Central Heat Pump - SEER 12	unit	2	\$175	\$315
Central Heat Pump - Tier I	unit	2	\$275	\$495
Central Heat Pump - Tier II	unit	0	\$400	\$0
Central Heat Pump - Tier III	unit	0	\$500	\$0
Package Terminal AC (>2,	unit	50	\$100	\$5,000
Package Terminal HP	unit	50	\$150	\$7,500
Occupancy Sensor wall	sensor	150	\$10	\$1,500
Occupancy Sensor ceiling	sensor	400	\$10	\$4,000
Photocell	photocell	50	\$10	\$500
Exit Sign Retrofit Kit (LED)	fixture	1,200	\$5	\$5,400
LED Exit Sign	fixture	1,200	\$14	\$16,200
2.0 gpm Showerhead	Unit	150	\$3.25	\$488
Faucet Aerator	Unit	50	\$1.25	\$63
Turn-In-Torchiere Floor	Unit	4,500	\$75	\$337,500
<b>Total</b>				<b>\$1,471,955</b>

# **Attachment B: Program Cost Proposal**

**SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL MULTIFAMILY REBATES**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	\$ 114,800		5.7%
Benefits	66,500		3.3%
Travel/Conference/Training	3,400		0.2%
Reporting/Tracking/Development - Information Services	30,000		1.5%
Materials & Handling	20,100		1.0%
Overhead and General and Administrative costs	98,600		4.9%
Subcontractor Administrative costs	100,000		5.0%
<b>Total Administrative Costs</b>	<b>433,400</b>		<b>21.7%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>58,000</b>		<b>2.9%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	1,472,000		73.6%
Installation costs	-		0.0%
Activity costs	-		0.0%
Rebate Processing/Inspection	103,100		5.2%
<b>Total Direct Implementation costs</b>	<b>1,575,100</b>		<b>78.8%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>136,000</b>		<b>6.8%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(202,500)		-10.1%
<b>Budget Grand Total</b>	<b>\$ 2,000,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, etc. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

**SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL MULTIFAMILY REBATES**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
<b>Labor</b>			
Type A - Program Planning/Design/Program Mgmt.	\$ 70,300		3.5%
Type B - Mgmt./Supervisor	38,700		1.9%
Type C - Clerical Support	5,800		0.3%
Subtotal Labor	114,800		5.7%
<b>Benefits</b>			
Pensions & Benefits	57,700	48.6% of SCE Labor	2.9%
Payroll Taxes	8,800	7.4% of SCE Labor	0.4%
Subtotal Benefits	66,500		3.3%
<b>Travel/Conference/Training</b>			
Type A - Mileage and Parking	2,000		0.1%
Type B - Other - Meals, lodging, misc. expenses	-		0.0%
Type C - Conference/Training Activities	1,400		0.1%
Subtotal Travel costs	3,400		0.2%
<b>Reporting/Tracking/Development - Information Services</b>	30,000		1.5%
<b>Materials &amp; Handling</b>	20,100		1.0%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	29,600		1.5%
Type B - Accounting Support	22,300		1.1%
Type C - Communications/Telecommunications/Automated Systems Support	33,100		1.7%
Type D - Human Resources Support	8,600		0.4%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	5,000		0.3%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	98,600		4.9%
<b>Subcontractor Administrative costs (administrative only, report other subcontractor costs in the appropriate category)</b>			
Labor	100,000		5.0%
Benefits			0.0%
Overhead			0.0%
Travel costs			0.0%
Reporting costs			0.0%
Materials & Handling			0.0%
Overhead and General and Administrative costs			0.0%
Subtotal Subcontractor Administrative costs	100,000		5.0%
Profit			0.0%
<b>Total Administrative Costs</b>	<b>433,400</b>		<b>21.7%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
Type A - Brochures/Booklets	38,000		1.9%
Type B - Media Support	20,000		1.0%
Type C - Outreach	-		0.0%
Total Marketing/Advertising/Outreach Costs	58,000		2.9%

**SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL MULTIFAMILY REBATES, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>	-		0.0%
	1,472,000		73.6%
Subtotal Financial Incentives	1,472,000		73.6%
<b>Itemized installation costs</b>			0.0%
Subtotal Installation costs	-		0.0%
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>			
<b>Itemized activity costs</b>			0.0%
Subtotal Activity costs	-		0.0%
<b>Rebate Processing/Inspection</b>			0.0%
Process Applications	103,100		5.2%
Subtotal Rebate Processing/Inspection costs	103,100		5.2%
<b>Total Direct Implementation costs</b>	<b>1,575,100</b>		<b>78.8%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			
EM&V labor			0.0%
Subtotal EM&V Labor	-		0.0%
<b>Benefits</b>			
Pensions & Benefits			0.0%
Payroll Taxes			0.0%
Subtotal Benefits	-		0.0%
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking			0.0%
Type B - Other - Meals, lodging, misc. expenses			0.0%
Type C - Conference/Training Activities			0.0%
Subtotal Travel Costs	-		0.0%
<b>Reporting costs</b>			
Report 1 (consultant cost)			0.0%
Report 2 (consultant cost)			0.0%
Subtotal EM&V Reporting Costs	-		0.0%
<b>Materials &amp; Handling</b>			
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support			0.0%
Type B - Accounting Support			0.0%
Type C - Communications/Telecommunications/Automated Systems Support			0.0%
Type D - Human Resources Support			0.0%
Type E - Facilities Support			0.0%
Type F - Supervision			0.0%
Type G - Corporate Services			0.0%
Type H - Transportation Services, Shop Services			0.0%
Type I - Information Technology			0.0%
Type J - Procurement and Material Management			0.0%
Subtotal Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>136,000</b>		<b>6.8%</b>

**SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL MULTIFAMILY REBATES, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
<b>Itemized, may include:</b>			
<b>Financing Costs</b>	-		0.0%
<b>Bonding Costs</b>	-		0.0%
<b>Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)</b>	(202,500)		-10.1%
<b>Budget Grand Total</b>	\$ 2,000,000		100.0%

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, and the EMV Manual. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

# Home Energy Efficiency Survey Implementation Plan

## 1. Title of Individual Program

Home Energy Efficiency Survey

## 2. Plans to Implement this Decision's Changes to Original Proposal

### 2.1 Program Summary

The Home Energy Efficiency Survey (HEES) program is a statewide effort that provides residential customers with valuable information to assist them with understanding, controlling and reducing energy use in their homes. The Home Energy Efficiency Survey program uses two delivery channels: Mail-In surveys, which include targeted direct mailings, and the interactive online survey. Both delivery channels are open to all eligible residential customers. The interactive online component is available in English, and allows customers to obtain immediate results by answering specific questions regarding their energy use online. The mail-in, or written version of the survey, is available in additional languages, and provides customers with similar information as the on-line survey, in an easy-to-complete mail-back format. Both survey tools help consumers understand how their behavior can affect energy costs, how to improve their home's energy efficiency, and what additional resources and programs are available to help reduce energy use.

#### **Mail-In- (Written Version):**

Mail-In surveys will be available in English and Spanish in all four investor-owned utilities (IOUs) service territories, in Chinese in Pacific Gas & Electric (PG&E), Southern California Gas Company (SoCalGas), and Southern California Edison (SCE) service territories, and in Vietnamese in San Diego Gas and Electric's (SDG&E) service territory. Mail-In surveys are distributed to consumers via direct mail marketing efforts, as handouts through in-home visits and public events, and through customer requests. Participating customers are given a survey and materials explaining the value of the program. Once completed, the survey is mailed back to the statewide mail-in survey vendor for processing. Completed surveys are analyzed against the customer's actual energy usage, and a report representing actual energy usage in graph form is mailed to the customer. Reports include information on energy efficiency products and services, rebate programs, and other energy-related information to encourage adoption of energy efficiency measures identified through the energy survey. Beginning this year, mail-in surveys will also be available in multiple languages via each IOU's web site. These Spanish-, Chinese-, and Vietnamese-language surveys (as specified above), will be posted prominently on the utility's web site, and may be downloaded by consumers for completion and mail-back. Consumers will receive a mailed-back customized report in the language they selected.

#### **On-Line (Interactive):**

The English-language online energy survey provides information on energy use via the Internet. Consumers input specific data regarding their energy use and receive immediate results through



an online report that provides an explanation of where energy dollars are spent. This easy to use tool provides customers with immediate short- and long-term changes they can make to become more energy efficient.

### **Marketing**

The IOUs will implement various outreach methods to solicit customer participation for the mail-in and online surveys. Marketing and outreach for the mail-in survey may include direct mailings, marketing through local events, community collaborations, education programs, and/or call centers. With respect to the online survey, efforts may include utility web sites (through banners and placement), customer call centers, and/or bill inserts. Second and third language translations may be marketed through ethnic specific newsletters or papers, utility newsletters, community-based organizations, local media announcements, and utility websites. Program administration includes ongoing development of program design and implementation, budget preparation, customer communications, working with market suppliers and vendors, budget tracking, and reporting of program activities. Tracking results for both the mail-in and the online surveys will be reported in the IOU's quarterly reports to the California Public Utilities Commission (CPUC).

### **3. Energy and Peak Demand Savings Targets**

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

### **4. Cost-Effectiveness**

There is no estimate of energy, capacity, therm savings, or cost effectiveness for this information program. Although it is the intention of each energy efficiency program to encourage the efficient utilization of electricity and/or natural gas, the calculations performed for the 2002 program cost-effectiveness utilize energy, capacity, and therm savings estimates for measures and programs for which there is a lower degree of speculation. The lack of energy savings, capacity savings, therm savings, resource benefits, or a TRC ratio for any particular program (i.e., information programs) should not imply that a measure or program does not promote energy efficiency nor should it imply that there is not an impact to the customer's use of electricity or natural gas or a corresponding impact to the electricity or natural gas system. However, pursuant to the CPUC's approved Energy Efficiency Policy Manual (Policy Manual), this proposal for an information-only program is not reasonably expected to provide an estimate of energy savings

### **5. Evaluation Program Progress For Information-only Programs**

The CPUC adopted targets for this program include the following:

- 18,000 mail-in audits
- 12,000 online audits

Program progress for the written survey to include both hard-to-reach (HTR) and non-HTR, will be reported based on the following:

- Number of written surveys distributed (includes mail-in and customer requests)
- Number of completed survey reports returned to customers

Program progress for the on-line version of the survey will be reported based on the following:

- Number of surveys completed on-line

IOUs will report on the progress of the mail-in and online surveys in their quarterly reports to the CPUC.

## 6. Hard-To-Reach Targets

IOUs will work within the CPUC’s definition of HTR customers to actively target this group through direct mailings. In Decision 02-03-056, the CPUC required that 50% of the following mail in survey targets will be sent to HTR customers:

	Mail In survey targets	Hard-to-reach mailings
SCE	18,000	9,000

Utilities will target HTR customers based on the CPUC’s definition of HTR. One or more of the following customer segments definitions will be targeted for mailing by each of the utilities.

Language: primary language spoken is other than English

Income: Those customers who fall into the moderate income level

Housing Type: Multifamily and mobile home tenants

Geographic: Residents of areas other than San Francisco Bay area, San Diego area, Los Angeles Basin, or Sacramento

Homeownerships: Renters

Progress toward meeting these goals will be reported in each investor-owned utilities’ (IOUs) quarterly report, as the number of customers solicited within one or more HTR customer segments.

## 7. Budget

Program	'002 Budget
Home Energy Efficiency Survey	\$900,000

Notes:

Program budget does not include EM&V activities funded from the statewide EM&V budget.

See, Attachment B for a detailed budget.

## **8. Payment Schedule**

The CPUC has adopted this program for the remaining nine months of calendar year 2002 thus the payment of funds to the sponsoring utility will be collected during the second, third and fourth quarter of 2002. This payment schedule is abbreviated from the two-year schedule outlined in CPUC's Energy Efficiency Policy Manual in recognition of the program's limited nine-month implementation period.

## **Attachment A: Measure Forecast Table**

**Not Applicable**

# **Attachment B: Program Budget**

**SOUTHERN CALIFORNIA EDISON  
HOME ENERGY EFFICIENCY SURVEY**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	96,900		10.8%
Benefits	54,200		6.0%
Travel/Conference/Training	2,400		0.3%
Reporting/Tracking/Development - Information Services	45,000		5.0%
Materials & Handling	4,800		0.5%
Overhead and General and Administrative costs	44,100		4.9%
Subcontractor Administrative costs	-		0.0%
<b>Total Administrative Costs</b>	<b>247,400</b>		<b>27.5%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>232,000</b>		<b>25.8%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	-		0.0%
Installation costs	-		0.0%
Activity costs	474,800		52.8%
Rebate Processing/Inspection	-		0.0%
<b>Total Direct Implementation costs</b>	<b>474,800</b>		<b>52.8%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>81,000</b>		<b>9.0%</b>
	<b>81,000</b>		<b>9.0%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(135,200)		-15.0%
			0.0%
<b>Budget Grand Total</b>	<b>900,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, etc. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

**SOUTHERN CALIFORNIA EDISON  
HOME ENERGY EFFICIENCY SURVEY**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	96,900		10.8%
Benefits	54,200		6.0%
Travel/Conference/Training	2,400		0.3%
Reporting/Tracking/Development - Information Services	45,000		5.0%
Materials & Handling	4,800		0.5%
Overhead and General and Administrative costs	44,100		4.9%
Subcontractor Administrative costs	-		0.0%
<b>Total Administrative Costs</b>	<b>247,400</b>		<b>27.5%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>232,000</b>		<b>25.8%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	-		0.0%
Installation costs	-		0.0%
Activity costs	474,800		52.8%
Rebate Processing/Inspection	-		0.0%
<b>Total Direct Implementation costs</b>	<b>474,800</b>		<b>52.8%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>81,000</b>		<b>9.0%</b>
	<b>81,000</b>		<b>9.0%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(135,200)		-15.0%
			0.0%
<b>Budget Grand Total</b>	<b>900,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, etc. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

**SOUTHERN CALIFORNIA EDISON  
HOME ENERGY EFFICIENCY SURVEY, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>	-		0.0%
Subtotal Financial Incentives	-		0.0%
<b>Itemized installation costs</b>			0.0%
Subtotal Installation costs	-		0.0%
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>			
<b>Itemized activity costs</b>			
12,000 online audits @ 2.44 each	29,300		3.3%
18,000 mail-in audits @ 24.75 each	445,500		49.5%
Subtotal Activity costs	474,800		52.8%
<b>Rebate Processing/Inspection</b>			
Subtotal Rebate Processing/Inspection costs	-		0.0%
<b>Total Direct Implementation costs</b>	474,800		52.8%
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			
EM&V labor	-		0.0%
Subtotal EM&V Labor	-		0.0%
<b>Benefits</b>			
Pensions & Benefits	-		0.0%
Payroll Taxes	-		0.0%
Subtotal Benefits	-		0.0%
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking	-		0.0%
Type B - Other - Meals, lodging, misc. expenses	-		0.0%
Type C - Conference/Training Activities	-		0.0%
Subtotal Travel Costs	-		0.0%
<b>Reporting costs</b>			
Report 1 (consultant cost)	-		0.0%
Report 2 (consultant cost)	-		0.0%
Subtotal EM&V Reporting Costs	-		0.0%
<b>Materials &amp; Handling</b>	-		0.0%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	-		0.0%
Type B - Accounting Support	-		0.0%
Type C - Communications/Telecommunications/Automated Systems Support	-		0.0%
Type D - Human Resources Support	-		0.0%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	-		0.0%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	81,000		9.0%



SOUTHERN CALIFORNIA EDISON  
HOME ENERGY EFFICIENCY SURVEY, Cont'd

Program Budget Detail

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
<b>Itemized, may include:</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(135,200)		-15.0%
<b>Budget Grand Total</b>	<b>900,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requiremen

Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

# California Energy Star® New Homes Programs Implementation Plans

## 1. Title of Individual Programs

California Energy Star® New Homes Programs

- Multi-Family California Energy Star® New Homes Program
- Single Family California Energy Star® New Homes Program

## 2. Plans to Implement this Decision's Changes to Original Proposals

### 2.1 Program Summary

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

The residential new construction market for both single family and multi-family housing has long been recognized as a potential “lost opportunity” for long-term energy savings. Building homes and apartment buildings that are even more energy-efficient than the State’s minimum requirements (Title 24) is more sensible both economically and environmentally. The California Energy Star New Homes Programs will also be effective in the Hard-to-Reach market segments the Commission has identified, specifically: housing for senior citizens, housing for individuals with special needs, housing for lower-to-moderate income households, and rental units.

### 2.2 Implementation Plans

The California Energy Star New Homes Programs are designed to encourage single family and multi-family (including rental apartments, condominiums, and townhomes) builders to construct homes that exceed Title 24 through a combination of financial incentives, design assistance, and education. These performance-based programs are designed to encourage homebuilders to construct single family and multi-family dwellings that are 15% and 20% more efficient than required by the 2001 Residential Energy Efficiency Standards – initiated in State Assembly Bill (AB) 970. The 15% level has been designated by the EPA as the new Energy Star® homes baseline for California, subsequent to the Title 24 revisions (2001 Standards) brought about in

AB 970. As a result, buyers of **single-family homes, and renters of multifamily** have energy-efficient, money-saving, comfort and quality alternatives compared to standard new housing.

The program will also offer a high-rise (four floors or more) multi-family component. The EPA's Energy Star currently does not have a designation for high-rise multi-family buildings. The information gathered on participation as a result of this high-rise component will be shared with EPA Energy Star. EPA is also interested in the outcome of this program activity for possible future Energy Star designation of high-rise multi-family buildings.

To make it easier for single family and multi-family builders to participate in the Programs on a statewide basis, utilities have adopted identical application procedures and program requirements. Effective April 1, 2002, the following program implementation procedures will apply in the service territories of PG&E, SCE, SDG&E, and SoCalGas:

2.2.1 Single family and/or multi-family builders will submit respective application for each project to their respective Utility, which must include the following documentation:

- A full set of construction plans
- An electronic or hard copy of the participating project's compliance documentation created using CEC-approved Title 24 software.

2.2.2 Program staff /agents assigned to the project will review the submitted documentation to assure accuracy, thoroughness, and viability of project.

2.2.3. Once project submittal has been evaluated for eligibility, the **single family and/or multi-family** builder will be notified that the project qualifies for the programs. At that point, the progress of the project will be monitored. Conversely, if the project does not meet minimum requirements for participation, the builder will be notified. The builder may resubmit a new application if corrections are made, and minimum program requirements subsequently met. An approved application will be valid for up to 24 months, which allows builders adequate time to construct residential units.

2.2.4 At the appropriate time during construction, the single family and/or multi-family builder will arrange to have a CHEERS rater inspect 100% of every unique model/floor plan, and 15% of the production units (at minimum, one out of every seven homes) to verify program compliance. Upon receiving documentation from CHEERS that certifies the agreed-upon measures were installed, the utility will process incentive payment to the **single family and/or multi-family** builder.

2.2.5 The Programs have an implementation team in place that markets the program to **single family and multi-family builders**. These implementation teams also provide assistance to the builder in completing the program applications and gathering the necessary supporting documentation that is required for submittal with the program application.

## 2.2.6 California Energy Star® Homes Programs Incentive Structure

### Multi-Family Program

Climate Zones	Performance Threshold	Incentive Per Home
All	15% > Title 24 Minimum Compliance	\$150
All	20% > Title 24 Minimum Compliance	\$250

### Single Family Program

Climate Zones	Performance Threshold	Incentive Per Home
Coastal (CZ 1-7)	15% > Title 24 Minimum Compliance	\$400
Inland (CZ 8-16)	15% > Title 24 Minimum Compliance	\$500
Coastal (CZ 1-7)	20% > Title 24 Minimum Compliance	\$600
Inland (CZ 8-16)	20% > Title 24 Minimum Compliance	\$900

## 2.3 Outreach

Outreach to the **single family and/or multi-family** homebuilders will continue through each utility's local and regional involvement with Building Industry Associations, Affordable Housing Associations, and other associations related to single family, multi-family residential new construction, with emphasis in the Hard-to-Reach segments of those markets. Collateral materials needed to support the implementation of the Programs include a statewide Multi-family Program Application and Single Family Program Application (both available April, 2002), and a multi-family and single family builder brochure/fact sheet that will summarize the programs' requirements (available by June, 2002).

2.3.1 PG&E, SCE, SDG&E, and SoCalGas will maintain a presence in industry activities that offer opportunities to promote the statewide Programs, such as:

- Pacific Coast Builders Conference (June 25 -28, 2002, Moscone Convention Center). Conference focused toward both single family and multi-family builders.
- Building Industry Show (November 7 & 8, 2002, Long Beach Convention Center). Conference focused toward both single family and multi-family builders.

- Southern California Association of Non-Profit Housing (SCANPH) Conference (September 27, 2002, Los Angeles). Conference focused toward multi-family builders
- American Institute of Architects Meetings
- Apartment Associations' Chapter Meetings. Meetings focused toward multi-family builders.
- Local Building Industry Association Chapter Meetings. Meetings focused toward single family builders.
- California Building Industry Association's (CBIA) Quarterly Committee Meetings. Meetings focused toward both single family and multi-family builders.

2.3.3 In the case of new construction, local governments are an optimal outreach resource due to the interaction between the builder and local building departments. The programs will utilize these relationships to promote and market not only new construction programs, but other energy efficiency programs that require local government intervention.

### 3. Energy and Peak Demand Savings Targets

#### Single Family California Energy Star® New Homes Program

Measure	Unit Defined	Forecast Units	Total Net kWh	Net kWh per unit	Total Net kW	Net kW per unit
Single Family Homes	Dwellings	4,720	2,906,944	616	3,122	0.66
<b>Total</b>			<b>2,906,944</b>		<b>3,122</b>	

#### Multi-Family California Energy Star® New Homes Program

Measure	Unit Defined	Forecast Units	Total Net kWh	Net kWh per unit	Total Net kW	Net kW per unit
Multi-Family	Defined	2,000	286,400	143	308	0.15
<b>Total</b>			<b>286,400</b>		<b>308</b>	

Notes:

- Energy and demand targets may vary between single family and multi-family.
- If EM&V is to be conducted by the IOUs, protocols will be established for measuring energy and peak demand accomplishments for these programs.
- Please note that the SCE and SoCalGas single family and multi-family forecasts should be viewed in concert with one another. Owing to the overlap of service territories, SCE and SoCalGas have structured their programs focus and outreach efforts to minimize overlap and maximize resultant savings. SCE will focus their efforts primarily on the single family market and builders serving that market. SoCalGas will

focus their efforts primarily on the multi-family market and builders associated with that market. Marketing and outreach efforts will be coordinated so as to ensure that both the single family and multi-family opportunities are efficiently handled for builders serving both market segments and for builders working in municipal utility service territories served by only one of the two IOUs.

- D. The energy savings and demand reduction forecasts differ from the CPUC adopted targets listed in Decision 02-03-056.

#### 4. Cost Effectiveness

##### Single Family California Energy Star® New Homes Program

	Program Benefits	Program Costs	Net Benefits	Benefit/Cost Ratio
<b>Total Resource Cost Test</b>	\$2,288,000	\$4,018,343	(\$1,730,343)	0.57
<b>Participant Cost Test</b>	\$4,628,000	2,662,000	1,966,000	1.74

##### Multi-Family California Energy Star® New Homes Program

	Program Benefits	Program Costs	Net Benefits	Benefit/Cost Ratio
<b>Total Resource Cost Test</b>	\$225,000	\$579,308	(\$354,308)	0.39
<b>Participant Cost Test</b>	\$525,000	360,000	165,000	1.46

#### 5. Evaluating Program Progress For Information-only Programs

Section is not applicable to these non-information programs.

#### 6. Hard-to-Reach Targets

PG&E, SCE, SDG&E, and SoCalGas possess strong community ties and well-developed relationships with local builders, associations and organizations that serve Hard-to-Reach markets. In the past, many of these market actors have often participated in the IOUs' individual residential new construction programs. However, prior to 2002, the participation of these market actors was not tracked independent of the "general population." The sheer expanse of the geographic area served by the statewide programs provides the utilities with an even greater opportunity to work with a larger and more diverse Hard-to-Reach market. These successes will be tracked accordingly.

Outreach Strategies: Substantial housing is developed by housing authorities. The IOU's implementation teams have established relationships with these entities through previous programs and continued outreach. Projects proposed by these agencies mostly consist of senior, disabled, and lower-income housing. These will be targeted for program participation. In addition, projects meeting federal affordable housing criteria will be targeted. Rental housing

projects and projects in rural and moderate-income areas will be specifically targeted. If housing project appears targeted to a specific language group or is in a zip code with a majority of ethnic households, it will be more likely to include non-English occupants. Such projects will be targeted to encourage program participation.

In compliance with CPUC Decision 02-03-056, 20% of the direct implementation funds allocated for these programs will be reserved for units constructed for hard-to-reach customers.

## 7. Budgets

<b>Programs</b>	<b>2002 Budget</b>
Multi-Family California Energy Star® New Homes Program	<b>\$500,000</b>
Single Family California Energy Star® New Homes Program	<b>\$3,500,000</b>
<b>Total</b>	<b>\$4,000,000</b>

Notes:

Program budgets do not include EM&V activities funded from the statewide EM&V budget.

See, Attachment B for a detailed budget.

## 8. Payment Schedule

The CPUC has adopted these programs for the remaining nine months of calendar year 2002 thus the payment of funds to the sponsoring utility will be collected during the second, third and fourth quarter of 2002. This payment schedule is abbreviated from the two-year schedule outlined in CPUC's Energy Efficiency Policy Manual in recognition of the programs' limited nine-month implementation period.

# **Attachment A: Measure Forecast Table**



Single Family California Energy Star® New Homes Program

<b>Measure</b>	<b>Unit Defined</b>	<b>Forecast Units</b>	<b>Rebate per unit</b>	<b>Total Rebate</b>
Single Family Homes	Dwellings	4,720	\$496	\$2,340,000
<b>Total</b>				<b>\$2,340,000</b>

Multi-Family California Energy Star® New Homes Program

<b>Measure</b>	<b>Unit Defined</b>	<b>Forecast Units</b>	<b>Rebate per unit</b>	<b>Total Rebate</b>
Multi-Family	Defined	2,000	\$150	\$300,000
<b>Total</b>				<b>\$300,000</b>

# **Attachment B: Program Budgets**

SOUTHERN CALIFORNIA EDISON  
**Multifamily California Energy Star New Homes Program**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	20,400		4.1%
Benefits	11,400		2.3%
Travel/Conference/Training	5,200		1.0%
Reporting/Tracking/Development - Information Services	-		0.0%
Materials & Handling	500		0.1%
Overhead and General and Administrative costs	24,900		5.0%
Subcontractor Administrative costs	-		0.0%
<b>Total Administrative Costs</b>	<b>62,400</b>		<b>12.5%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>39,000</b>		<b>7.8%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	300,000		60.0%
Installation costs	-		0.0%
Activity costs	110,000		22.0%
Rebate Processing/Inspection	-		0.0%
<b>Total Direct Implementation costs</b>	<b>410,000</b>		<b>82.0%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>27,000</b>		<b>5.4%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(38,400)		-7.7%
<b>Budget Grand Total</b>	<b>500,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, and Reporting Requirements Manual. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

SOUTHERN CALIFORNIA EDISON  
**Single Family California Energy Star New Homes Program**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	161,200		4.6%
Benefits	92,500		2.6%
Travel/Conference/Training	41,400		1.2%
Reporting/Tracking/Development - Information Services	5,000		0.1%
Materials & Handling	53,500		1.5%
Overhead and General and Administrative costs	178,900		5.1%
Subcontractor Administrative costs	-		0.0%
<b>Total Administrative Costs</b>	<b>532,500</b>		<b>15.2%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>276,800</b>		<b>7.9%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	2,340,000		66.9%
Installation costs	-		0.0%
Activity costs	439,100		12.5%
Rebate Processing/Inspection	4,100		0.1%
<b>Total Direct Implementation costs</b>	<b>2,783,200</b>		<b>79.5%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>189,000</b>		<b>5.4%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(281,500)		-8.0%
<b>Budget Grand Total</b>	<b>3,500,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, and the EMV Manual. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

**SOUTHERN CALIFORNIA EDISON**  
**Multifamily California Energy Star New Homes Program**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
<b>Labor</b>			
Type A - Program Planning/Design/Program Mgmt.	\$ 20,400		4.1%
Type B - Mgmt./Supervisor	-		0.0%
Type C - Clerical Support	-		0.0%
Subtotal Labor	20,400		4.1%
<b>Benefits</b>			
Pensions & Benefits	9,900	48.6% of SCE Labor	2.0%
Payroll Taxes	1,500	7.4% of SCE Labor	0.3%
Subtotal Benefits	11,400		2.3%
<b>Travel/Conference/Training</b>			
Type A - Mileage and Parking	1,200		0.2%
Type B - Other - Meals, lodging, misc. expenses	-		0.0%
Type C - Conference/Training Activities	4,000		0.8%
Subtotal Travel costs	5,200		1.0%
<b>Reporting/Tracking/Development - Information Services</b>	-		0.0%
<b>Materials &amp; Handling</b>	500		0.1%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	7,300		1.5%
Type B - Accounting Support	5,600		1.1%
Type C - Communications/Telecommunications/Automated Systems Support	8,300		1.7%
Type D - Human Resources Support	2,200		0.4%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	1,500		0.3%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	24,900		5.0%
<b>Subcontractor Administrative costs (administrative only, report other subcontractor costs in the appropriate category)</b>			
Labor	-		0.0%
Benefits	-		0.0%
Overhead	-		0.0%
Travel costs	-		0.0%
Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
Subtotal Subcontractor Administrative costs	-		0.0%
Profit	-		0.0%
<b>Total Administrative Costs</b>	<b>62,400</b>		<b>12.5%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
Type A - Brochures/Booklets	12,000		2.4%
Type B - Media Support	27,000		5.4%
Type C - Outreach	-		0.0%
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>39,000</b>		<b>7.8%</b>

**SOUTHERN CALIFORNIA EDISON**  
**Multifamily California Energy Star New Homes Program, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>	-		
See, Attachment A, Measure Forecast Table	300,000		60.0%
Subtotal Financial Incentives	300,000		60.0%
<b>Itemized installation costs</b>			0.0%
Subtotal Installation costs	-		0.0%
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>			
<b>Itemized activity costs</b>			
20 projects @ \$5,500 each	110,000		22.0%
Subtotal Activity costs	110,000		22.0%
<b>Rebate Processing/Inspection</b>			
Subtotal Rebate Processing/Inspection costs	-		0.0%
<b>Total Direct Implementation costs</b>	<b>410,000</b>		<b>82.0%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			
EM&V labor			0.0%
Subtotal EM&V Labor	-		0.0%
<b>Benefits</b>			
Pensions & Benefits			0.0%
Payroll Taxes			0.0%
Subtotal Benefits	-		0.0%
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking			0.0%
Type B - Other - Meals, lodging, misc. expenses			0.0%
Type C - Conference/Training Activities			0.0%
Subtotal Travel Costs	-		0.0%
<b>Reporting costs</b>			
Report 1 (consultant cost)			0.0%
Report 2 (consultant cost)			0.0%
Subtotal EM&V Reporting Costs	-		0.0%
<b>Materials &amp; Handling</b>			
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support			0.0%
Type B - Accounting Support			0.0%
Type C - Communications/Telecommunications/Automated Systems Support			0.0%
Type D - Human Resources Support			0.0%
Type E - Facilities Support			0.0%
Type F - Supervision			0.0%
Type G - Corporate Services			0.0%
Type H - Transportation Services, Shop Services			0.0%
Type I - Information Technology			0.0%
Type J - Procurement and Material Management			0.0%
Subtotal Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>27,000</b>		<b>5.4%</b>

**SOUTHERN CALIFORNIA EDISON**  
**Multifamily California Energy Star New Homes Program, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
<b>Itemized, may include:</b>			0.0%
<b>Financing Costs</b>	-		0.0%
<b>Bonding Costs</b>	-		0.0%
<b>Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)</b>	(38,400)		-7.7%
<b>Budget Grand Total</b>	\$ 500,000		100.0%

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, and the EMV Manual. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

**SOUTHERN CALIFORNIA EDISON**  
**Single Family California Energy Star New Homes Program**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
<b>Labor</b>			
Type A - Program Planning/Design/Program Mgmt.	\$ 139,900		4.0%
Type B - Mgmt./Supervisor	21,300		0.6%
Type C - Clerical Support			0.0%
Subtotal Labor	161,200		4.6%
<b>Benefits</b>			
Pensions & Benefits	80,300	48.6% of SCE Labor	2.3%
Payroll Taxes	12,200	7.4% of SCE Labor	0.3%
Subtotal Benefits	92,500		2.6%
<b>Travel/Conference/Training</b>			
Type A - Mileage and Parking	15,600		0.4%
Type B - Other - Meals, lodging, misc. expenses	-		0.0%
Type C - Conference/Training Activities	25,800		0.7%
Subtotal Travel costs	41,400		1.2%
<b>Reporting/Tracking/Development - Information Services</b>			
	5,000		0.1%
<b>Materials &amp; Handling</b>			
	53,500		1.5%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	51,800		1.5%
Type B - Accounting Support	39,000		1.1%
Type C - Communications/Telecommunications/Automated Systems Support	58,000		1.7%
Type D - Human Resources Support	15,100		0.4%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	15,000		0.4%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	178,900		5.1%
<b>Subcontractor Administrative costs (administrative only, report other subcontractor costs in the appropriate category)</b>			
Labor			0.0%
Benefits			0.0%
Overhead			0.0%
Travel costs			0.0%
Reporting costs			0.0%
Materials & Handling			0.0%
Overhead and General and Administrative costs			0.0%
Subtotal Subcontractor Administrative costs	-		0.0%
Profit			0.0%
<b>Total Administrative Costs</b>	<b>532,500</b>		<b>15.2%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
Type A - Brochures/Booklets	110,000		3.1%
Type B - Media Support	166,800		4.8%
Type C - Outreach	-		0.0%
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>276,800</b>		<b>7.9%</b>



**SOUTHERN CALIFORNIA EDISON**  
**Single Family California Energy Star New Homes Program, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>			
See, Attachment A, Measure Forecast Table	2,340,000		66.9%
Subtotal Financial Incentives	2,340,000		66.9%
<b>Itemized installation costs</b>			0.0%
Subtotal Installation costs	-		0.0%
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>			
<b>Itemized activity costs</b>			
75 projects @ \$5,850 each	439,100		12.5%
Subtotal Activity costs	439,100		12.5%
<b>Rebate Processing/Inspection</b>			
	4,100		0.1%
Subtotal Rebate Processing/Inspection costs	4,100		0.1%
<b>Total Direct Implementation costs</b>	<b>2,783,200</b>		<b>79.5%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			
EM&V labor			0.0%
Subtotal EM&V Labor	-		0.0%
<b>Benefits</b>			
Pensions & Benefits			0.0%
Payroll Taxes			0.0%
Subtotal Benefits	-		0.0%
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking			0.0%
Type B - Other - Meals, lodging, misc. expenses			0.0%
Type C - Conference/Training Activities			0.0%
Subtotal Travel Costs	-		0.0%
<b>Reporting costs</b>			
Report 1 (consultant cost)			0.0%
Report 2 (consultant cost)			0.0%
Subtotal EM&V Reporting Costs	-		0.0%
<b>Materials &amp; Handling</b>			0.0%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support			0.0%
Type B - Accounting Support			0.0%
Type C - Communications/Telecommunications/Automated Systems Support			0.0%
Type D - Human Resources Support			0.0%
Type E - Facilities Support			0.0%
Type F - Supervision			0.0%
Type G - Corporate Services			0.0%
Type H - Transportation Services, Shop Services			0.0%
Type I - Information Technology			0.0%
Type J - Procurement and Material Management			0.0%
Subtotal Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>189,000</b>		<b>5.4%</b>

**SOUTHERN CALIFORNIA EDISON**  
**Single Family California Energy Star New Homes Program, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
<b>Itemized, may include:</b>			
<b>Financing Costs</b>	-		0.0%
<b>Bonding Costs</b>	-		0.0%
<b>Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)</b>	(281,500)		-8.0%
<b>Budget Grand Total</b>	\$ 3,500,000		100.0%

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, and Reporting Requirements Manual. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

# Nonresidential Standard Performance Contract Implementation Plan

## 1. Title of Individual Program

Nonresidential Standard Performance Contract (SPC) Program

## 2. Plans to Implement This Decision's Changes to Original Proposals

The SPC Program offers cash incentives for custom-designed energy savings retrofits of existing business facilities. The SPC program is designed primarily for large and medium businesses, but small and very small businesses can also participate if their measures do not qualify for the Express Efficiency Program. Examples of possible SPC projects include:

- Refrigeration system upgrade at a chain of grocery stores;
- Chiller and HVAC (heating, ventilating and air conditioning) replacement in a large office building;
- Lighting system, boiler and energy management system retrofit in a school district;
- Variable speed drives and efficient motors in processing plant;
- Steam system waste heat recovery project at a food processing plant.

SPC will be available to all nonresidential electric and gas customers for investment in complex or specialized facility retrofit projects that do not neatly fit under a prescriptive equipment rebate program. Any utility customer paying the gas or electric PGC (public goods charge) in the investor owned service territories would be eligible. This includes utility customers who may have opted to purchase electricity or gas from other suppliers. Third party EESPs (energy efficiency service providers) who sponsor energy efficiency retrofit projects at utility customer facilities are eligible to participate.

SPC will continue to focus its outreach and marketing efforts on those businesses that have more customized needs, are using more innovative technologies, or are considering larger, more complex projects. SPC education, outreach and marketing activity will be targeted at utility business customers, EESPs, trade associations, other local business groups and government entities. The program will be promoted to customers using the utility websites, utility representatives, EESPs, mailings and through events in the Education and Training Services Program.

The SPC Program pays incentives based on standard incentive rates per kilowatt-hour (kWh) of electricity or therm of gas saved. Financial incentives provided under SPC are intended to help offset costs for investments in custom energy efficient facility retrofits. The following incentive levels are subject to change based on market conditions:

- \$.08 per kWh saved (other measures)

- \$.14 per kWh saved (HVAC/refrigeration)
- \$.05 per kWh saved (lighting system measures)
- \$.45 per therm saved

SPC program incentive caps will be \$300,000 per project site. Statewide incentives are capped at \$1.5 million per Corporate parent and \$4.0 million per State and Federal Agency, County and Local governments. Project Sponsors, whether a self-sponsoring customer or a third party, are limited to 25% of the utility SPC incentive budgets. SPC incentives will be limited to the lesser of the SPC incentive caps, or 50% of the SPC project cost.

Incentives for energy saved will be based on engineering calculations, system modeling or quantitative measurements. The advantage for the business customer is that they can be sure what the project will save in their facilities. Incentives are paid upon project completion and inspection.

Utilities will retain the option to require measurement and verification of energy savings on those projects where energy savings cannot be modeled or estimated. Complex projects with questionable or unproven energy savings or new technologies may be required to perform 1 or 2 years of EM&V. Projects using the “Measure Savings” option will receive an additional 10% energy savings incentive to help defray EM&V costs. Measure Savings projects can receive up to 110% of the estimated incentive dollars based on actual measured energy savings.

Eligible SPC projects are retrofit projects that save at least 5,000 kWh of electricity or 500 therms per year. Similar projects at like facilities or for like measures can be aggregated under one SPC project. To qualify under SPC, the installed energy efficiency retrofit measure(s) must be permanent, be operated for at least 5 years and have an economic life of 5 years or greater. New construction, capacity expansion, load shifting, repairs, maintenance, cogeneration and fuel switching projects do not qualify under SPC.

The SPC program will continue to emphasize non-lighting measures with at least 70% of the incentive budget allocated for non-lighting retrofits. To be eligible for SPC incentives, lighting measures must be part of a comprehensive retrofit project (lighting plus non-lighting measures with at least 20% of the energy savings resulting from the non-lighting measures.)

For large customers (greater than 500 kW demand), lighting upgrades with “first generation” energy efficiency lighting technology is not an eligible SPC project. The definition of first generation T-8 lighting refers to the 700 Series of lighting with color rendering index (CRI) > 70. Eligible lighting projects for large customers must be for the installation of “second generation” and/or “third generation” lighting technology. The definition for Second Generation T-8 Lighting includes Premium T-8 Lamps with electronic ballasts, replacing existing T-12 lamps and magnetic ballasts. "Premium" means minimum rated life (at 3-hour start rating) of 24,000 hours with rapid-start ballasts or 18,000 hours with instant-start ballasts. Lamps must have a CRI > 85. The definition for Third Generation T-8 Lighting includes Premium T-8 plus the following characteristics: Lamps - initial (catalog) lumen output > 3100; ballasts - ballast factor < 0.77. All lighting measures must be part of a comprehensive retrofit project.

As in prior program years, the SPC program applicant must submit an SPC application before starting work on the project. The SPC participant process is initiated with submittal of a SPC Project Application (PA). The utility customer or third party representing the customer can submit a PA. The PA describes the energy efficiency retrofit project, projected energy savings, and measurement and verification plan (if applicable).

The PA is reviewed and approved by the utility program administrator. If necessary, site pre-inspection, baseline energy usage measurement and verification are part of the application review. Utility approval of the PA reserves SPC incentive dollars. The utility accepts SPC applications on first-come, first served basis until SPC funds are fully committed.

Following approval of the PA, the customer or third party Project Sponsor and the utility sign an SPC Agreement (contract) for the estimated energy savings. The project is then implemented and a Project Installation Report (PIR) prepared to document as-built conditions. The PIR also certifies that the project was installed and operating per the SPC Agreement.

After inspection and acceptance of the PIR, 100% of the SPC incentives (for Calculated Savings Option) or 60% of the SPC incentives (for Measured Savings Option) is paid. The remaining 40% for Measured Saving Option is paid after approval of the Operating Report (1 year).

### 3. Energy and Peak Demand Savings Targets

Measure	Unit Defined	Forecast Units	Total Net kWh	Net kWh per unit	Total Net kW	Net kW per unit
Air Conditioning	kWh	24,200,000	12,826,000	0.53	3,367	0.00014
Lighting	kWh	1,000,000	530,000	0.53	88	0.00009
Other	kWh	53,854,545	28,542,909	0.53	5,599	0.00010
<b>Total</b>			<b>41,898,909</b>		<b>9,055</b>	

Notes:

A - Measure mix may vary.

B - Total net energy savings may differ from the energy savings targets provided in Decision 02-03-056.

### 4. Cost-Effectiveness

	Program Benefits	Program Costs	Net Benefits	Benefit/Cost Ratio
<b>Total Resource Cost Test</b>	\$30,391,000	\$10,172,312	\$20,218,688	2.99
<b>Participant Cost Test</b>	\$38,391,000	8,333,000	30,058,000	4.61

**5. Evaluating Program Progress For Information-only Programs**

Section is not applicable to this non-information program.

**6. Hard-to-Reach Targets**

The SPC program was not designed for the hard-to-reach customer. Two of the three IOUs have committed the majority of their SPC incentive funds from wait listed SPC projects. The IOUs will continue to outreach to all customers in the future if there are projects that drop out or additional funds become available for SPC projects.

**7. Budget**

<b>Program</b>	<b>2002 Budget</b>
Nonresidential Standard Performance Contract Program	<b>\$9,650,000</b>

Notes:

Program budget does not include EM&V activities funded from the statewide EM&V budget. See, Attachment B for a detailed budget.

**8. Payment Schedule**

The California Public Utilities Commission (CPUC) has adopted this program for the remaining nine months of calendar year 2002 thus the payment of funds to the sponsoring utility will be collected during the second, third and fourth quarter of 2002. This payment schedule is abbreviated from the two-year schedule outlined in CPUC's Energy Efficiency Policy Manual in recognition of the program's limited nine-month implementation period.

## **Attachment A: Measure Forecast Table**

<b>Measure</b>	<b>Unit Defined</b>	<b>Forecast Units</b>	<b>Rebate per unit</b>	<b>Total Rebate</b>
Air Conditioning	kWh	24,200,000	\$0.14	\$3,474,800
Lighting	kWh	1,000,000	\$0.05	\$50,000
Other	kWh	53,854,545	\$0.08	\$4,475,200
<b>Total</b>				<b>\$8,000,000</b>



# **Attachment B: Program Budget**

**SOUTHERN CALIFORNIA EDISON  
STANDARD PERFORMANCE CONTRACTS**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	\$ 170,300		1.8%
Benefits	197,200		2.0%
Travel/Conference/Training	46,300		0.5%
Reporting/Tracking/Development - Information Services	-		0.0%
Materials & Handling	13,200		0.1%
Overhead and General and Administrative costs	469,000		4.9%
Subcontractor Administrative costs	81,500		0.8%
<b>Total Administrative Costs</b>	<b>977,500</b>		<b>10.1%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>378,900</b>		<b>3.9%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	8,000,000		82.9%
Installation costs	-		0.0%
Activity costs	-		0.0%
Rebate Processing/Inspection	490,800		5.1%
<b>Total Direct Implementation costs</b>	<b>8,490,800</b>		<b>88.0%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>189,000</b>		<b>2.0%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(386,200)		-4.0%
			0.0%
<b>Budget Grand Total</b>	<b>\$ 9,650,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, etc. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

**SOUTHERN CALIFORNIA EDISON  
STANDARD PERFORMANCE CONTRACTS**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
<b>Labor</b>			
Type A - Program Planning/Design/Program Mgmt.	\$ 17,400		
Type B - Mgmt./Supervisor	133,700		
Type C - Clerical Support	19,200		
Subtotal Labor	170,300		
<b>Benefits</b>			
Pensions & Benefits	171,200	48.6% of SCE Labor	
Payroll Taxes	26,000	7.4% of SCE Labor	
Subtotal Benefits	197,200		
<b>Travel/Conference/Training</b>			
Type A - Mileage and Parking	23,100		
Type B - Other - Meals, lodging, misc. expenses	6,500		
Type C - Conference/Training Activities	16,700		
Subtotal Travel costs	46,300		
<b>Reporting/Tracking/Development - Information Services</b>			
	-		
<b>Materials &amp; Handling</b>			
	13,200		
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	142,600		
Type B - Accounting Support	107,600		
Type C - Communications/Telecommunications/Automated Systems Support	159,900		
Type D - Human Resources Support	41,600		
Type E - Facilities Support	-		
Type F - Supervision	-		
Type G - Corporate Services	-		
Type H - Transportation Services, Shop Services	-		
Type I - Information Technology	17,300		
Type J - Procurement and Material Management	-		
Subtotal Overhead and General and Administrative costs	469,000		
<b>Subcontractor Administrative costs (administrative only, report other subcontractor costs in the appropriate category)</b>			
Labor	50,000		
Benefits	-		
Overhead	-		
Travel costs	-		
Reporting costs	-		
Materials & Handling	-		
Overhead and General and Administrative costs	-		
Profit	31,500		
Subtotal Subcontractor Administrative costs	81,500		
<b>Total Administrative Costs</b>	<b>977,500</b>		
<b>Marketing/Advertising/Outreach Costs</b>			
Type A - Brochures/Booklets	112,500		
Type B - Media Support	75,200		
Type C - Outreach	191,200		
Total Marketing/Advertising/Outreach Costs	378,900		

SOUTHERN CALIFORNIA EDISON  
STANDARD PERFORMANCE CONTRACTS, Cont'd

Program Budget Detail

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>			
See Attachment A, Measure Forecast Table	8,000,000		
Subtotal Financial Incentives	8,000,000		
<b>Itemized installation costs</b>			
Subtotal Installation costs	-		
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>			
<b>Itemized activity costs</b>			
Subtotal Activity costs	-		
<b>Rebate Processing/Inspection</b>			
Engineering Review	340,800		
Engineering Review - Future Years	150,000		
Subtotal Rebate Processing/Inspection costs	490,800		
<b>Total Direct Implementation costs</b>	<b>8,490,800</b>		
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			
EM&V labor	-		
Subtotal EM&V Labor	-		
<b>Benefits</b>			
Pensions & Benefits	-		
Payroll Taxes	-		
Subtotal Benefits	-		
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking	-		
Type B - Other - Meals, lodging, misc. expenses	-		
Type C - Conference/Training Activities	-		
Subtotal Travel Costs	-		
<b>Reporting costs</b>			
Report 1 (consultant cost)	-		
Report 2 (consultant cost)	-		
Subtotal EM&V Reporting Costs	-		
<b>Materials &amp; Handling</b>			
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	-		
Type B - Accounting Support	-		
Type C - Communications/Telecommunications/Automated Systems Support	-		
Type D - Human Resources Support	-		
Type E - Facilities Support	-		
Type F - Supervision	-		
Type G - Corporate Services	-		
Type H - Transportation Services, Shop Services	-		
Type I - Information Technology	-		
Type J - Procurement and Material Management	-		
Subtotal Overhead and General and Administrative costs	-		
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>189,000</b>		

SOUTHERN CALIFORNIA EDISON  
STANDARD PERFORMANCE CONTRACTS, Cont'd

Program Budget Detail

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
<b>Itemized, may include:</b>			
Financing Costs	-		
Bonding Costs	-		
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(386,200)		
<b>Budget Grand Total</b>	<b>\$ 9,650,000</b>		

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, and the Standard Practice Manual, Reporting Requirements Manual. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

# **Nonresidential Express Efficiency Implementation Plan**

## **1. Title of Individual Program**

Nonresidential Express Efficiency

## **2. Plans to Implement this Decision's Changes to Original Proposals**

### **2.1 Program Summary**

The Express Efficiency program has been offered statewide by California's investor-owned utilities (IOUs) since 1999. Prior to 1999, each IOU independently offered prescriptive rebate programs similar to Express Efficiency. In 2002, nonresidential rebates will be offered for a specific list of proven energy efficient measures that include lighting, HVAC, refrigeration, agriculture, gas, LED lighting technology, and motor retrofit measures. All rebates and collateral materials will reflect statewide consistency throughout all IOU service areas. The Express Efficiency program will be limited to small and medium customers, defined as those whose monthly electric demand, when aggregated, does not exceed 500 kW or whose monthly gas usage does not exceed 20,800 therms per month or are currently served under a core gas rate schedule. These customers typically include "mom and pop" enterprises, local chains, laundries, hospitals, schools, local government facilities, non-profit commercial facilities and other tax exempt entities that have a harder time managing the first cost of energy efficient equipment. Prescriptive rebates will help to offset initial energy efficient equipment installation costs.

### **Reservations**

As of the April 1, 2002 program rollout, all IOUs have a system in place for accepting reservation requests. The system gives customers the opportunity to ensure funding prior to purchasing energy efficient products that qualify for rebates.

### **Marketing and Outreach**

The strategies are multi-faceted and will include English, Spanish, Korean, Chinese and Vietnamese multilingual marketing materials and technical sources. Direct mail pieces will be targeted to economic development areas, rural areas and other hard-to-reach (HTR) customers. Informational pieces will educate customers as to the amount of the rebate available for a specific piece(s) of equipment and how to receive a rebate. The IOUs may also assist small businesses develop and tailor energy efficiency information to disseminate to their own constituents and stakeholders, where applicable (e.g., countertop display promotions that highlight specific energy efficiency measures applicable to and available within non-English speaking neighborhoods).

**Promotional and Delivery Vehicles**

Promotional efforts may include multiple combinations of advertising in trade journals, telemarketing, participation in community events, working with faith-based organizations (FBOs), and various other approaches as shown in the table below.

One-to-One Contact	Promotional Vehicles	Delivery Vehicles	Tools
<ul style="list-style-type: none"> <li>○ Call center</li> <li>○ Project Specialist</li> <li>○ Customer Service Representatives</li> <li>○ Account Executives</li> <li>○ Specialized Account Executives</li> </ul>	<ul style="list-style-type: none"> <li>○ Foodservice Journals</li> <li>○ Multilingual Applications/ Brochures</li> <li>○ Email Marketing</li> <li>○ Targeted Telemarketing</li> </ul>	<ul style="list-style-type: none"> <li>○ Bill inserts</li> <li>○ Bill messages</li> <li>○ Direct mail</li> <li>○ Conferences</li> <li>○ Customized audits</li> <li>○ Vendor and Trade Allies</li> </ul>	<ul style="list-style-type: none"> <li>○ Web site Information</li> <li>○ Foodservice Centers</li> <li>○ Professional Contacts</li> <li>○ Community Based Organizations</li> <li>○ Faith Based Organizations</li> <li>○ Local Governments</li> </ul>

**Ongoing**

Delivery vehicles, the various ways in which the program content is actually provided to targeted audiences, will continue to feature multiple approaches in 2002. Third-party involvement, group workshops/seminars, and company Web sites have all increased in importance during the past several years and will continue to be available. Other approaches to expand delivery vehicles may include leveraging with community-based organizations (CBOs), increased media coverage in minority focused publications, and communications highlighting programs and services to the local government boards and commissions. IOU representatives will regularly visit various organizations to present program information and encourage program participation.

The IOUs will continue to develop relationships and encourage third-party and local vendor involvement as essential components of the sales process for high-efficiency equipment. In past programs, both have been instrumental in identifying qualifying customers with potential retrofit opportunities, and leveraging Express Efficiency rebates to capture those opportunities.

The IOUs' Express Efficiency Web sites will provide supplemental information, including current updates as to available funding levels. Customers requiring in-depth information can call their IOU, toll-free, for technical assistance and detailed program information.

Utilities will host and participate in seminars and other events to educate customers on energy efficient upgrade opportunities. Customers will be introduced to the new and often unfamiliar technologies, provided with an overview of the appropriate applications, and shown installation options. In an effort to effectively educate HTR customers on energy efficiency retrofit opportunities, presentations will be offered through CBOs, FBOs, associations, ethnic business

organizations, local chambers of commerce, non-profit organizations, and trade organizations. Customers who wish to participate in the Express Efficiency program can secure applications at these events and through a variety of sources including local IOU offices, local vendors, IOU Web sites, local chambers of commerce, local program implementers and various other sources.

**Special Promotions**

To increase program participation, a “Summer Special” promotion may occur in early summer. It will feature specific item(s) that will have enhanced rebate levels, are particularly easy to install, and ensure immediate kW demand relief or therm savings.



### 3. Energy and Peak Demand Savings Targets

Measure	Unit Defined	Forecast Units	Total Net kWh	Net kWh per unit	Total Net kW	Net kW per unit
Package Terminal Air Conditioners	ton	4,700	1,728,457	368	708	0.15
Package single Tier 1-air cooled	ton	4,700	2,796,357	595	1,146	0.24
Split System single Tier 1- air cooled	ton	4,800	2,439,844	508	1,000	0.21
Package single Tier 2 - air cooled	ton	2,900	1,922,408	663	788	0.27
Split System single Tier 2- air cooled	ton	2,900	1,861,271	642	763	0.26
Package single Tier 3 - air cooled	ton	2,450	1,784,792	728	731	0.30
Split System Tier 3 - air cooled	ton	1	721	721	0	0.30
65-135kBTU air cooled, package or split Tier 2	ton	4,800	1,191,813	248	488	0.10
135-240 kBTU air cooled, package or split Tier 2	ton	1	269	269	0	0.11
>240 kBTU air cooled, package or split Tier 2	ton	4,800	1,416,684	295	581	0.12
Variable-Frequency Drives - HVAC Fans	hp	1	723	723	0	0.00
Variable-Frequency Drives - Chilled Water Pumps	hp	1	864	864	0	0.00
Setback Programmable Thermostats	unit	70	275,050	3,929	0	0.00
Reflective Window Film - Coastal	ft2	500	6,240	12	0	0.00
Reflective Window Film - Inland	ft2	50,000	768,000	15	0	0.00
Reflective Window Film - Desert	ft2	20,000	460,800	23	0	0.00
Evaporative Coolers	ton	140	340,032	2,429	73	0.52
Evaporator Fan Controller	controller	100	106,464	1,065	0	0.00
Screw-in Compact Fluorescent Lamp, 5 - 13 watts	lamp	15,000	2,091,384	139	446	0.03
Screw-in Compact Fluorescent Lamp, 14-26 watts	lamp	40,000	8,905,248	223	1,901	0.05
Screw-in Compact Fluorescent Lamp, >=27watts	lamp	15,000	6,341,616	423	1,354	0.09
Hardwired Fluorescent Fixture, 5-13 watts	fixture	1,000	202,392	202	43	0.04
Hardwired Fluorescent Fixture, 14-26 watts	fixture	2,500	832,056	333	178	0.07
Hardwired Fluorescent Fixture, 27-65 watts(incandescent	fixture	6,500	4,151,285	639	886	0.14
Hardwired Fluorescent Fixture, 27-65 watts(mercury vapor	fixture	1,200	361,607	301	77	0.06
Hardwired Fluorescent Fixture, 66-90 watts(incandescent	fixture	900	874,333	971	187	0.21
Hardwired Fluorescent Fixture, 66-90 watts(mercury vapor	fixture	3,000	1,565,165	522	334	0.11
Hardwired Fluorescent Fixture, >90 watts(incandescent	fixture	900	874,333	971	187	0.21
Hardwired Fluorescent Fixture, >90 watts(mercury vapor	fixture	1	522	522	0	0.11
Induction Lamps and fixtures <55 watts	fixture	1	234	234	0	0.05
Induction Lamps and fixtures 55 - 100 watts	fixture	1	810	810	0	0.17
Induction Lamps and fixtures >100 watts	fixture	1	1,543	1,543	0	0.33
Exit Sign Retrofit Kit	fixture	1	285	285	0	0.03
LED Exit Sign	fixture	372	106,073	285	12	0.03
LED Traffic Signal (RED)	fixture	1,500	867,240	578	135	0.09
LED Traffic Signal Amber Flashing	fixture	1,500	646,362	431	132	0.09
LED Traffic Signal (Green)	fixture	1,500	725,328	484	124	0.08
LED Traffic Signal (hand/pedestrian)	fixture	1,500	589,723	393	59	0.04
LED Channel Signage (Red) indoor <2ft	foot	10,000	419,328	42	72	0.01
LED Channel Signage (Red) indoor >2ft	foot	10,000	838,656	84	144	0.01
LED Channel Signage (Red) outdoor <2ft	foot	10,000	838,656	84	72	0.01
LED Channel Signage (Red) outdoor >2ft	foot	10,000	420,480	42	144	0.01

## Energy and Peak Demand Savings Targets (continued)

Measure	Unit Defined	Forecast Units	Total Net kWh	Net kWh per unit	Total Net kW	
Electronic Ballast, Non-Dimming	lamp	0	0	31	0	0.01
Electronic Ballast, Dimming(with daylighting)	lamp	0	0	58	0	0.01
T-8 Lamp and Electronic, 2-foot lamp installed	lamp	550	27,210	49	6	0.01
2nd gen T-8 Lamp and Electronic, 2-foot lamp installed	lamp	750	37,105	49	8	0.01
T-8 Lamp and Electronic, 2-foot lamp removed	lamp	575	96,980	169	21	0.04
T-8 Lamp and Electronic, 3-foot lamp installed	lamp	4,000	233,875	58	50	0.01
2nd gen T-8 Lamp and Electronic, 3-foot lamp installed	lamp	0	0	58	0	0.01
T-8 Lamp and Electronic, 3-foot lamp removed	lamp	0	0	198	0	0.04
T-8 Lamp and Electronic, 4-foot lamp installed	lamp	62,674	2,536,925	40	541	0.01
2nd gen T-8 Lamp and Electronic, 4-foot lamp installed	lamp	90,000	3,643,056	40	778	0.01
T-8 Lamp and Electronic, 4-foot lamp removed	lamp	3,657	707,252	193	151	0.04
T-8 Lamp and Electronic, 8-foot lamp installed	lamp	1,689	68,368	40	15	0.01
T-8 Lamp and Electronic, 8-foot lamp removed	lamp	96	34,110	355	7	0.08
Interior HID fixture 0-35 watts incandescent basecase	lamp	0	0	247	0	0.05
Interior HID fixture 0-35 watts mercury vapor basecase	lamp	0	0	130	0	0.03
Interior HID fixture 36-70 watts incandescent basecase	lamp	0	0	495	0	0.11
Interior HID fixture 36-70 watts mercury vapor basecase	lamp	0	0	157	0	0.03
Interior HID fixture 71-100 watts incandescent basecase	lamp	144	110,749	769	24	0.16
Interior HID fixture 71-100 watts mercury vapor basecase	lamp	0	0	319	0	0.07
Interior HID fixture 101-175 watts incandescent basecase	lamp	0	0	1,304	0	0.28
Interior HID fixture 101-175 watts mercury vapro basecase	lamp	0	0	337	0	0.07
Interior HID fixture 176 - 250 watts mercury vapro	lamp	0	0	819	0	0.17
Interior HID fixture 176-250 watts incandescent basecase	lamp	0	0	2,078	0	0.44
Interior HID fixture 251 - 400 watts mercury vapro	lamp	0	0	2,172	0	0.46
Interior HID fixture 251-400 watts incandescent basecase	lamp	0	0	2,851	0	0.61
Interior HID fixture 251-400 watts metal halide basecase	lamp	0	0	499	0	0.11
Exterior HID fixture 0-100 watts incandescent basecase	lamp	12	8,696	725	0	0.00
Exterior HID fixture 0-100 watts mercury vapor basecase	lamp	0	0	339	0	0.00
Exterior HID fixture 101-175 watts incandescent basecase	lamp	0	0	1,272	0	0.00
Exterior HID fixture 101-175 watts mercury vapor basecas	lamp	0	0	443	0	0.00
Exterior HID fixture > 176 watts incandescent basecase	lamp	0	0	1,858	0	0.00
Exterior HID fixture > 176 watts mercury vapor basecase	lamp	0	0	717	0	0.00
Interior Pulse Start Metal Halide (400 W replacements)	lamp	500	213,120	426	53	0.11
Interior HO T-5 4 lamp fixture retrofits	lamp	500	430,080	860	108	0.22
Occupancy Sensor wall mounted	sensor	1,000	400,286	400	85	0.09
Occupancy Sensor ceiling mounted	sensor	45	61,730	1,372	13	0.29
Plug Load sensor	sensor	550	244,894	445	52	0.10
Photocell	photocell	6	10,255	1,709	0	0.00
Timeclock	timeclock	1	1,709	1,709	0	0.00

## Energy and Peak Demand Savings Targets (continued)

Measure	Unit Defined	Forecast Units	Total Net kWh	Net kWh per unit	Total Net kW	Net kW per unit
Night Covers for Display Cases - med temp	linear ft	1,000	142,080	142	96	0.10
Night Covers for Display Cases - low temp	linear ft	1,000	56,640	57	38	0.04
Infiltration Barrier for Walk-ins (strip curtains)	ft2	1,250	102,000	82	0	0.00
Retrofit Glass doors on open vertical display cases (Low	door	300	809,856	2,700	153	0.51
Retrofit Glass doors on open vertical display cases	door	300	332,640	1,109	69	0.23
Replace reach in case w/doors with hi eff case with special	linear ft	500	682,560	1,365	77	0.15
New Low Temp reach in Display Case with doors( replace	linear ft	200	231,936	1,160	42	0.21
New Medium Temp reach in Display Case with Doors	linear ft	200	111,552	558	21	0.11
Special Doors with Low Anti-Sweat Heat low temp)	door	25	17,976	719	2	0.09
Anti-Sweat Heat Controller	linear ft	250	82,320	329	10	0.04
Insulate Bare Suction Pipes	linear ft	18	272	15	0	0.00
Main door Cooler Door Gaskets (Walk-in)	linear ft	25	792	32	0	0.00
Main Door Freezer Door Gaskets( Walk-in)	linear ft	25	1,224	49	0	0.00
Glass 'Cooler Door Gaskets (Reach-in or Walk-in)	linear ft	25	240	10	0	0.00
Auto-closer for Coolers	closer	25	22,296	892	0	0.00
Auto-closer for Freezers	closer	25	38,784	1,551	0	0.00
Oversized Air Cooled Condenser	hp	250	374,160	1,497	46	0.18
Oversized Evaporative Cooled Condenser	hp	250	225,120	900	29	0.12
Air cooled to Evaporative cooled condensers -	hp	125	339,360	2,715	58	0.46
Air cooled to Evaporative cooled condensers - multiplex	hp	125	228,000	1,824	66	0.53
Multiplex Compressor System air cooled	hp	50	132,000	2,640	14	0.29
Multiplex Compressor System - evap cooled	hp	50	72,000	1,440	7	0.14
Multiplex Compressor System w/ eff cond - air cooled	hp	50	136,800	2,736	14	0.29
Multiplex Compressor System w/ eff cond - evap cooled	hp	50	72,000	1,440	7	0.14
Floating Head Pressure Controller - air cooled	hp	25	21,600	864	3	0.12
Floating Head Pressure Controller - evap cooled	hp	25	10,080	403	0	0.00
Efficient Evaporator Fan Motors (SHP to PSC)	motor	250	20,160	81	3	0.01
Efficient Evaporator Fan Motors (SHP to ECM)	motor	125	20,160	161	3	0.02
High Efficiency Compressor	ton	500	504,480	1,009	77	0.15
Vending Machine Controller	controller	100	152,640	1,526	0	0.00
Sprinkler to Micro-Irrigation conversion	acre	2,000	1,073,280	537	603	0.30
Low pressure impact sprinkler nozzles( permanent)	nozzle	500	5,760	12	2	0.00
Low pressure impact sprinkler nozzles( portable)	nozzle	500	16,080	32	10	0.02
Variable Frequency Drives for Dairy Pumps	hp	100	358,080	3,581	0	0.00
Variable Frequency Drives for Injectin Molding Machines	hp	100	147,840	1,478	21	0.21
Motors 1-200 HP	hp	3,000	270,720	90	58	0.02
<b>Total</b>			<b>64,435,334</b>		<b>16,205</b>	

### NOTES:

- 1) Forecast units and total net kW, kWh impacts do not account for potential hard-to-reach promotions.
- 2) KWs, kWhs and therms per unit are average for building type and climate zone.
- 3) Total net energy savings may differ from the energy savings targets provided in Decision 02-03-056.

#### 4. Cost-Effectiveness

	<b>Program Benefits</b>	<b>Program Costs</b>	<b>Net Benefits</b>	<b>Benefit/Cost Ratio</b>
<b>Total Resource Cost Test</b>	\$39,918,000	\$17,407,345	\$22,510,655	2.29
<b>Participant Cost Test</b>	\$44,059,645	15,307,000	28,752,645	2.88

NOTE: Cost-effectiveness calculations exclude M&E costs for PG&E because statewide market assessment and evaluation activities are not addressed in Decision 02-03-056.

#### 5. Evaluation Program Progress For Information-only Programs

Section is not applicable to this non-information program.

## 6. Hard-to-Reach Targets

The 2002 Express Efficiency program will increase participation of hard-to-reach customers to 47% as compared to the participation of these customers in the 2001 Express Efficiency program. Hard-to-reach customers are defined as customers meeting either of the two measurable hard-to-reach criteria: located in outlying areas (measured by location in a rural zip code) or small (measured by monthly demand at or below 20 KW). In 2001, the combined participation of these customer groups was 43%.

## 7. Budget

<b>Program</b>	<b>2002 Budget</b>
Nonresidential Express Efficiency Program	<b>\$6,000,000</b>

Notes:

Program budget does not include EM&V activities funded from the statewide EM&V budget.

See, Attachment B for a detailed budget.

## 8. Payment Schedule

The California Public Utilities Commission (CPUC) has adopted this program for the remaining nine months of calendar year 2002, thus the payment of funds to the sponsoring utility will be collected during the second, third and fourth quarter of 2002. This payment schedule is abbreviated from the two-year schedule outlined in the CPUC's Energy Efficiency Policy Manual in recognition of the program's limited nine-month implementation period.

## **Attachment A: Measure Forecast Table**

Measure	Unit Defined	Forecast Units	Rebate per unit	Total Rebate
Package Terminal Air Conditioners	ton	4,700	\$50	\$235,000
Package single Tier 1-air cooled	ton	4,700	\$60	\$282,000
Split System single Tier 1- air cooled	ton	4,800	\$65	\$312,000
Package single Tier 2 - air cooled	ton	2,900	\$70	\$203,000
Split System single Tier 2- air cooled	ton	2,900	\$70	\$203,000
Package single Tier 3 - air cooled	ton	2,450	\$75	\$183,750
Split System Tier 3 - air cooled	ton	1	\$75	\$75
65-135kBTU air cooled, package or split Tier 2	ton	4,800	\$45	\$216,000
135-240 kBTU air cooled, package or split Tier 2	ton	1	\$50	\$50
>240 kBTU air cooled, package or split Tier 2	ton	4,800	\$55	\$264,000
Variable-Frequency Drives - HVAC Fans	hp	1	\$40	\$40
Variable-Frequency Drives - Chilled Water Pumps	hp	1	\$40	\$40
Setback Programmable Thermostats	unit	70	\$12	\$840
Reflective Window Film - Coastal	ft2	500	\$0	\$225
Reflective Window Film - Inland	ft2	50,000	\$0	\$22,500
Reflective Window Film - Desert	ft2	20,000	\$0	\$9,000
Evaporative Coolers	ton	140	\$70	\$9,800
Evaporator Fan Controller	controller	100	\$70	\$7,000
Screw-in Compact Fluorescent Lamp, 5 - 13 watts	lamp	15,000	\$2	\$22,500
Screw-in Compact Fluorescent Lamp, 14-26 watts	lamp	40,000	\$3	\$110,000
Screw-in Compact Fluorescent Lamp, >=27watts	lamp	15,000	\$4	\$63,750
Hardwired Fluorescent Fixture, 5-13 watts	fixture	1,000	\$13	\$12,500
Hardwired Fluorescent Fixture, 14-26 watts	fixture	2,500	\$12	\$28,750
Hardwired Fluorescent Fixture, 27-65 watts(incandescent	fixture	6,500	\$18	\$117,000
Hardwired Fluorescent Fixture, 27-65 watts(mercury vapor	fixture	1,200	\$17	\$20,400
Hardwired Fluorescent Fixture, 66-90 watts(incandescent	fixture	900	\$23	\$20,250
Hardwired Fluorescent Fixture, 66-90 watts(mercury vapor	fixture	3,000	\$22	\$64,500
Hardwired Fluorescent Fixture, >90 watts(incandescent	fixture	900	\$23	\$20,250
Hardwired Fluorescent Fixture, >90 watts(mercury vapor	fixture	1	\$22	\$22
Induction Lamps and fixtures <55 watts	fixture	1	\$6	\$6
Induction Lamps and fixtures 55 - 100 watts	fixture	1	\$50	\$50
Induction Lamps and fixtures >100 watts	fixture	1	\$60	\$60
Exit Sign Retrofit Kit	fixture	1	\$5	\$5
LED Exit Sign	fixture	372	\$14	\$5,022
LED Traffic Signal (RED)	fixture	1,500	\$33	\$48,750
LED Traffic Signal Amber Flashing	fixture	1,500	\$88	\$131,250
LED Traffic Signal (Green)	fixture	1,500	\$63	\$93,750
LED Traffic Signal (hand/pedestrian)	fixture	1,500	\$25	\$37,500
LED Channel Signage (Red) indoor <2ft	foot	10,000	\$2	\$24,000
LED Channel Signage (Red) indoor >2ft	foot	10,000	\$7	\$66,000
LED Channel Signage (Red) outdoor <2ft	foot	10,000	\$2	\$24,000
LED Channel Signage (Red) outdoor >2ft	foot	10,000	\$7	\$66,000

Measure	Unit Defined	Forecast Units	Rebate per unit	Total Rebate
Electronic Ballast, Non-Dimming	lamp	0	\$2	\$0
Electronic Ballast, Dimming(with daylighting)	lamp	0	\$10	\$0
T-8 Lamp and Electronic, 2-foot lamp installed	lamp	550	\$2	\$1,100
2nd gen T-8 Lamp and Electronic, 2-foot lamp installed	lamp	750	\$2	\$1,725
T-8 Lamp and Electronic, 2-foot lamp removed	lamp	575	\$1	\$575
T-8 Lamp and Electronic, 3-foot lamp installed	lamp	4,000	\$3	\$11,000
2nd gen T-8 Lamp and Electronic, 3-foot lamp installed	lamp	0	\$3	\$0
T-8 Lamp and Electronic, 3-foot lamp removed	lamp	0	\$1	\$0
T-8 Lamp and Electronic, 4-foot lamp installed	lamp	62,674	\$4	\$235,026
2nd gen T-8 Lamp and Electronic, 4-foot lamp installed	lamp	90,000	\$4	\$382,500
T-8 Lamp and Electronic, 4-foot lamp removed	lamp	3,657	\$2	\$5,486
T-8 Lamp and Electronic, 8-foot lamp installed	lamp	1,689	\$8	\$12,668
T-8 Lamp and Electronic, 8-foot lamp removed	lamp	96	\$2	\$216
Interior HID fixture 0-35 watts incandescent basecase	lamp	0	\$25	\$0
Interior HID fixture 0-35 watts mercury vapor basecase	lamp	0	\$23	\$0
Interior HID fixture 36-70 watts incandescent basecase	lamp	0	\$32	\$0
Interior HID fixture 36-70 watts mercury vapor basecase	lamp	0	\$30	\$0
Interior HID fixture 71-100 watts incandescent basecase	lamp	144	\$40	\$5,760
Interior HID fixture 71-100 watts mercury vapor basecase	lamp	0	\$38	\$0
Interior HID fixture 101-175 watts incandescent basecase	lamp	0	\$40	\$0
Interior HID fixture 101-175 watts mercury vapro basecase	lamp	0	\$38	\$0
Interior HID fixture 176 - 250 watts mercury vapro	lamp	0	\$38	\$0
Interior HID fixture 176-250 watts incandescent basecase	lamp	0	\$40	\$0
Interior HID fixture 251 - 400 watts mercury vapro	lamp	0	\$38	\$0
Interior HID fixture 251-400 watts incandescent basecase	lamp	0	\$40	\$0
Interior HID fixture 251-400 watts metal halide basecase	lamp	0	\$40	\$0
Exterior HID fixture 0-100 watts incandescent basecase	lamp	12	\$12	\$144
Exterior HID fixture 0-100 watts mercury vapor basecase	lamp	0	\$11	\$0
Exterior HID fixture 101-175 watts incandescent basecase	lamp	0	\$16	\$0
Exterior HID fixture 101-175 watts mercury vapor basecas	lamp	0	\$15	\$0
Exterior HID fixture > 176 watts incandescent basecase	lamp	0	\$25	\$0
Exterior HID fixture > 176 watts mercury vapor basecase	lamp	0	\$24	\$0
Interior Pulse Start Metal Halide (400 W replacements)	lamp	500	\$45	\$22,500
Interior HO T-5 4 lamp fixture retrofits	lamp	500	\$75	\$37,500
Occupancy Sensor wall mounted	sensor	1,000	\$8	\$7,500
Occupancy Sensor ceiling mounted	sensor	45	\$20	\$900
Plug Load sensor	sensor	550	\$15	\$8,250
Photocell	photocell	6	\$4	\$21
Timeclock	timeclock	1	\$9	\$9



Measure	Unit Defined	Forecast Units	Rebate per unit	Total Rebate
Night Covers for Display Cases - med temp	linear ft	1,000	\$3	\$3,000
Night Covers for Display Cases - low temp	linear ft	1,000	\$3	\$3,000
Infiltration Barrier for Walk-ins (strip curtains)	ft2	1,250	\$1	\$1,250
Retrofit Glass doors on open vertical display cases (Low	door	300	\$100	\$30,000
Retrofit Glass doors on open vertical display cases	door	300	\$50	\$15,000
Replace reach in case w/doors with hi eff case with special	linear ft	500	\$200	\$100,000
New Low Temp reach in Display Case with doors( replace	linear ft	200	\$200	\$40,000
New Medium Temp reach in Display Case with Doors	linear ft	200	\$150	\$30,000
Special Doors with Low Anti-Sweat Heat low temp)	door	25	\$50	\$1,250
Anti-Sweat Heat Controller	linear ft	250	\$14	\$3,500
Insulate Bare Suction Pipes	linear ft	18	\$0	\$7
Main door Cooler Door Gaskets (Walk-in)	linear ft	25	\$2	\$50
Main Door Freezer Door Gaskets( Walk-in)	linear ft	25	\$2	\$50
Glass 'Cooler Door Gaskets (Reach-in or Walk-in)	linear ft	25	\$1	\$25
Auto-closer for Coolers	closer	25	\$40	\$1,000
Auto-closer for Freezers	closer	25	\$40	\$1,000
Oversized Air Cooled Condenser	hp	250	\$75	\$18,750
Oversized Evaporative Cooled Condenser	hp	250	\$75	\$18,750
Air cooled to Evaporative cooled condensers -	hp	125	\$150	\$18,750
Air cooled to Evaporative cooled condensers - multiplex	hp	125	\$75	\$9,375
Multiplex Compressor System air cooled	hp	50	\$125	\$6,250
Multiplex Compressor System - evap cooled	hp	50	\$150	\$7,500
Multiplex Compressor System w/ eff cond - air cooled	hp	50	\$150	\$7,500
Multiplex Compressor System w/ eff cond - evap cooled	hp	50	\$275	\$13,750
Floating Head Pressure Controller - air cooled	hp	25	\$50	\$1,250
Floating Head Pressure Controller - evap cooled	hp	25	\$75	\$1,875
Efficient Evaporator Fan Motors (SHP to PSC)	motor	250	\$15	\$3,750
Efficient Evaporator Fan Motors (SHP to ECM)	motor	125	\$10	\$1,250
High Efficiency Compressor	ton	500	\$75	\$37,500
Vending Machine Controller	controller	100	\$15	\$1,500
Sprinkler to Micro-Irrigation conversion	acre	2,000	\$44	\$88,000
Low pressure impact sprinkler nozzles( permanent)	nozzle	500	\$0	\$175
Low pressure impact sprinkler nozzles( portable)	nozzle	500	\$0	\$175
Variable Frequency Drives for Dairy Pumps	hp	100	\$34	\$3,400
Variable Frequency Drives for Injectin Molding Machines	hp	100	\$35	\$3,500
Motors 1-200 HP	hp	3,000	\$4	\$12,000
<b>Total</b>				<b>\$4,141,645</b>

# **Attachment B: Program Budget**

**SOUTHERN CALIFORNIA EDISON  
NONRESIDENTIAL EXPRESS EFFICIENCY**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	464,500		7.7%
Benefits	353,725		5.9%
Travel/Conference/Training	52,025		0.9%
Reporting/Tracking/Development - Information Services	145,000		2.4%
Materials & Handling	64,575		1.1%
Overhead and General and Administrative costs	289,500		4.8%
Subcontractor Administrative costs	450		0.0%
<b>Total Administrative Costs</b>	<b>1,369,775</b>		<b>22.8%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>280,000</b>		<b>4.7%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	4,141,645		69.0%
Installation costs	75,150		1.3%
Activity costs	231,175		3.9%
Rebate Processing/Inspection	255,980		4.3%
<b>Total Direct Implementation costs</b>	<b>4,703,950</b>		<b>78.4%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>242,000</b>		<b>4.0%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(595,725)		-9.9%
<b>Budget Grand Total</b>	<b>6,000,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, etc. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

**SOUTHERN CALIFORNIA EDISON  
NONRESIDENTIAL EXPRESS EFFICIENCY**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
<b>Labor</b>			
Type A - Program Planning/Design/Program Mgmt.	\$ 304,375		5.1%
Type B - Mgmt./Supervisor	147,975		2.5%
Type C - Clerical Support	12,150		0.2%
Subtotal Labor	464,500		7.7%
<b>Benefits</b>			
Pensions & Benefits	306,975	48.6% of SCE Labor	5.1%
Payroll Taxes	46,750	7.4% of SCE Labor	0.8%
Subtotal Benefits	353,725		5.9%
<b>Travel/Conference/Training</b>			
Type A - Mileage and Parking	15,200		0.3%
Type B - Other - Meals, lodging, misc. expenses	29,550		0.5%
Type C - Conference/Training Activities	7,275		0.1%
Subtotal Travel costs	52,025		0.9%
<b>Reporting/Tracking/Development - Information Services</b>	145,000		2.4%
<b>Materials &amp; Handling</b>	64,575		1.1%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	88,700		1.5%
Type B - Accounting Support	66,900		1.1%
Type C - Communications/Telecommunications/Automated Systems Support	99,400		1.7%
Type D - Human Resources Support	25,900		0.4%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	6,000		0.1%
Type I - Information Technology	2,600		0.0%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	289,500		4.8%
<b>Subcontractor Administrative costs (administrative only, report other subcontractor costs in the appropriate category)</b>			
Labor	450		0.0%
Benefits	-		0.0%
Overhead	-		0.0%
Travel costs	-		0.0%
Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
Subtotal Subcontractor Administrative costs	450		0.0%
Profit			
<b>Total Administrative Costs</b>	<b>1,369,775</b>		<b>22.8%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
Type A - Brochures/Booklets	130,000		2.2%
Type B - Media Support	150,000		2.5%
Type C - Outreach	-		0.0%
Total Marketing/Advertising/Outreach Costs	280,000		4.7%

**SOUTHERN CALIFORNIA EDISON  
NONRESIDENTIAL EXPRESS EFFICIENCY, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>	-		0.0%
See, Attachment A, Measure Forecast Table	4,141,645		69.0%
Subtotal Financial Incentives	4,141,645		69.0%
<b>Itemized installation costs</b>			
Subtotal Installation costs	75,150		1.3%
	75,150		1.3%
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>			
<b>Itemized activity costs</b>			
Technical Assistance	231,175		3.9%
Subtotal Activity costs	231,175		3.9%
<b>Rebate Processing/Inspection</b>			
Process EE Application	255,980		4.3%
Subtotal Rebate Processing/Inspection costs	255,980		4.3%
<b>Total Direct Implementation costs</b>	<b>4,703,950</b>		<b>78.4%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			
EM&V labor	-		0.0%
Subtotal EM&V Labor	-		0.0%
<b>Benefits</b>			
Pensions & Benefits	-		0.0%
Payroll Taxes	-		0.0%
Subtotal Benefits	-		0.0%
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking	-		0.0%
Type B - Other - Meals, lodging, misc. expenses	-		0.0%
Type C - Conference/Training Activities	-		0.0%
Subtotal Travel Costs	-		0.0%
<b>Reporting costs</b>			
Report 1 (consultant cost)	-		0.0%
Report 2 (consultant cost)	-		0.0%
Subtotal EM&V Reporting Costs	-		0.0%
<b>Materials &amp; Handling</b>			
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	-		0.0%
Type B - Accounting Support	-		0.0%
Type C - Communications/Telecommunications/Automated Systems Support	-		0.0%
Type D - Human Resources Support	-		0.0%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	-		0.0%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>242,000</b>		<b>4.0%</b>

**SOUTHERN CALIFORNIA EDISON  
NONRESIDENTIAL EXPRESS EFFICIENCY, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
<b>Itemized, may include:</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(595,725)		-9.9%
<b>Budget Grand Total</b>	<b>6,000,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements

Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

# **Nonresidential Energy Audit Program Implementation Plan**

## **1. Title of Individual Program**

Nonresidential Energy Audit Program

## **2. Plans to Implement This Decision's Changes to Original Proposals**

### **2.1 Program Summary**

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

The program is designed to equip nonresidential customers with the tools they need to make sound, informed decisions about implementing energy efficient measures in their businesses. The program provides a full range of professional technical assistance to educate customers on how to implement no cost, low cost measures and cost-effective energy-efficiency retrofits in their buildings to reduce energy consumption and lower their energy bills.

There are many different types of energy audits available to nonresidential customers. Small and medium customer options include a phone-based audit, mail-in audit, CD ROM audit, on-site energy audit or an on-line audit. In response to Decision 02-03-056, San Diego Gas and Electric (SDG&E) developed their on-line audit in 2000 and it was available to customers on December 28, 2000. In response to Decision 02-03-056, Pacific Gas & Electric (PG&E) developed an on-line audit that should be available by May 20, 2002. Audits for large customers include a prescreening process to select high energy saving end uses and secure customers' commitments for implementation.

This program will be marketed using various methods including bill inserts, mailings to specific market segments, utility Web sites, utility representatives, partnerships with public-private organizations (in energy efficiency, water conservation and pollution prevention), community and faith-based organizations, colleges and universities, municipal electric and gas utilities, and governmental agencies.

Several resources will be used to reach the hard-to-reach (HTR) customer segment. These may include one or more of the following:

- Distribution of mail-back audits and CD-ROMs at customer fairs, events and third party activities.
- Working with Community Based Organizations (CBO)

- Making calls to customers identified as hard-to-reach.
- Mailing/Distributing CD-ROM self energy audit to selected businesses via mail, through CBOs and local agencies, or through utility representatives.
- Follow-up activities to answer questions about audit results, provide additional information regarding incentive programs, and assist in implementation of energy efficiency projects

The various types of audits available include:

- A Phone-Administered Energy Audit is conducted over-the-phone and provides energy information and technical assistance to customers. Utility phone representatives take a proactive approach in identifying callers who may benefit from an over-the-phone energy audit. The utility representative will gather the customer's information and produce a customized report containing energy efficiency recommendations that will be sent to the customer. This report also outlines the potential energy and dollar savings that the customer can realize if the recommended measures are implemented along with utility incentive program information. A representative may also provide post-audit follow up to identify and address barriers to implementing the recommended measures.
- A Mail-in audit is an audit questionnaire that is completed by the customer and mailed to the utility or its vendor. The questionnaire is analyzed and results are compiled into an audit report. This report is mailed to the customer and contains audit recommendations and information about utility incentive programs.
- A CD-ROM audit is a computer disk that contains an audit survey to be completed by the customer. This report contains energy efficiency recommendations and information about equipment upgrades. The report may also contain information on utility rebates & incentive programs. The CD-ROM has built in calculators and can generate (print) the report instantaneously from a customer's personal computer. All investor-owned utilities (IOUs) should have a CD-ROM audit available by the summer of 2002.
- An On-line Energy Audit is offered when a customer logs on to the utility Web site and links to the on-line energy audit questionnaire. Low cost and no cost measures are identified as well as those requiring an investment by the customer. Additionally, links to utility rebates and incentives are offered. The customer completes the entire survey on-line. Upon completion, the survey summary report can be printed from the customer's personal computer. Auditors may assist customers in completing rebate applications.
- An Onsite Energy Audit involves going to a customer's facility and performing an energy assessment. The energy use audit identifies ways that the customer can address immediate demand and energy savings by implementing no-cost, low-cost measures and recommended investment saving opportunities.



Customers will receive an audit report that includes audit recommendations and information on utility rebate and incentive programs.

Small, medium and large business customers are eligible to participate in the Energy Audit Program. The IOUs offer on-site audits to the same set of customers with the same eligibility requirements. The customer segment and type of audit offered are listed in the following table:

**Customer Eligibility for Surveys**

Customer Segment	Type of Audit				
	Mail-In	CD Rom	On-Line	Phone	On-Site
Hard to Reach	✓	✓	✓	✓	✓
Very Small	✓	✓	✓	✓	✓
Small	✓	✓	✓	✓	✓
Medium		✓	✓		✓
Large *					✓

\* This program is open to all nonresidential customers with the exception of large non-core gas customers that do not contribute to the gas public purpose programs as per AB1002

The “How To Do an Energy Audit” training component offers comprehensive energy audit training for organizations that promote energy efficiency opportunities in their communities. Opportunities to reduce the cost of lighting, heating, cooling, food service equipment and more will be highlighted. This training consists of the following: pre-qualification test, in-class training, ride along training option, and a final exam (certification of completion).

The IOUs will offer energy audit training as part of the Nonresidential Energy Audit Program or the Education and Training Services Program.

### **3. Energy and Peak Demand Savings Targets**

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

### **4. Cost-Effectiveness**

There is no estimate of energy, capacity, therm savings, or cost effectiveness for this information program. Although it is the intention of each energy efficiency program to

encourage the efficient utilization of electricity and/or natural gas, the calculations performed for the 2002 program cost-effectiveness utilize energy, capacity, and therm savings estimates for measures and programs for which there is a lower degree of speculation. The lack of energy savings, capacity savings, therm savings, resource benefits, or a TRC ratio for any particular program (i.e., information programs) should not imply that a measure or program does not promote energy efficiency nor should it imply that there is not an impact to the customer's use of electricity or natural gas or a corresponding impact to the electricity or natural gas system. However, pursuant to the CPUC's approved Energy Efficiency Policy Manual (Policy Manual), this proposal for an information-only program is not reasonably expected to provide an estimate of energy savings.

### 5. Evaluating Program Progress For Information-only Programs

Conduct 4,500 energy audits for nonresidential customers. This goal will be tracked by the tabulating the number of each type of audit for nonresidential customers.

### 6. Hard-to-Reach Targets

Conduct 1,800 energy audits for the HTR customers with a business size or geographic barrier as defined in the CPUC's Energy Efficiency Policy Manual. This goal will be tracked by the tabulating the number of audits for HTR nonresidential customers with a business size barrier or located in zip code areas identified as a geographic barrier.

### 7. Budget

<b>Program</b>	<b>2002 Budget</b>
Nonresidential Energy Audit Program	<b>\$1,400,000</b>

Notes:

Program budget does not include EM&V activities funded from the statewide EM&V budget. See, Attachment B for a detailed budget.

### 8. Payment Schedule

The CPUC has adopted this program for the remaining nine months of calendar year 2002 thus the payment of funds to the sponsoring utility will be collected during the second, third and fourth quarter of 2002. This payment schedule is abbreviated from the two-year schedule outlined in CPUC's Energy Efficiency Policy Manual in recognition of the program's limited nine-month implementation period.

# **Attachment A: Measure Forecast Table**

**Not Applicable**

# **Attachment B: Program Budget**

**SOUTHERN CALIFORNIA EDISON  
NONRESIDENTIAL ENERGY AUDITS**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	\$ 257,800		20.3%
Benefits	303,400		23.8%
Travel/Conference/Training	28,300		2.2%
Reporting/Tracking/Development - Information Services	-		0.0%
Materials & Handling	10,400		0.8%
Overhead and General and Administrative costs	70,500		5.5%
Subcontractor Administrative costs	-		0.0%
<b>Total Administrative Costs</b>	<b>670,400</b>		<b>52.7%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>107,400</b>		<b>8.4%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	-		0.0%
Installation costs	7,900		0.6%
Activity costs	790,600		62.1%
Rebate Processing/Inspection	-		0.0%
<b>Total Direct Implementation costs</b>	<b>798,500</b>		<b>62.7%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>173,000</b>		<b>13.6%</b>
	<b>173,000</b>		<b>13.6%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(476,400)		-37.4%
	-		0.0%
<b>Budget Grand Total</b>	<b>\$ 1,272,900</b>		<b>100.0%</b>
	<b>127,100</b>		

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, etc. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

**SOUTHERN CALIFORNIA EDISON  
NONRESIDENTIAL ENERGY AUDITS**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
<b>Labor</b>			
Type A - Program Planning/Design/Program Mgmt.	\$ 76,300		6.0%
Type B - Mgmt./Supervisor	134,300		10.6%
Type C - Clerical Support	47,200		3.7%
Subtotal Labor	257,800		20.3%
<b>Benefits</b>			
Pensions & Benefits	263,300	48.6% of SCE Labor	20.7%
Payroll Taxes	40,100	7.4% of SCE Labor	3.2%
Subtotal Benefits	303,400		23.8%
<b>Travel/Conference/Training</b>			
Type A - Mileage and Parking	13,700		1.1%
Type B - Other - Meals, lodging, misc. expenses	2,200		0.2%
Type C - Conference/Training Activities	12,400		1.0%
Subtotal Travel costs	28,300		2.2%
<b>Reporting/Tracking/Development - Information Services</b>	-		0.0%
<b>Materials &amp; Handling</b>			
	10,400		0.8%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	20,700		1.6%
Type B - Accounting Support	15,600		1.2%
Type C - Communications/Telecommunications/Automated Systems Support	23,200		1.8%
Type D - Human Resources Support	6,000		0.5%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	5,000		0.4%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	70,500		5.5%
<b>Subcontractor Administrative costs (administrative only, report other subcontractor costs in the appropriate category)</b>			
Labor	-		0.0%
Benefits	-		0.0%
Overhead	-		0.0%
Travel costs	-		0.0%
Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
Subtotal Subcontractor Administrative costs	-		0.0%
Profit	-		0.0%
<b>Total Administrative Costs</b>	<b>670,400</b>		<b>52.7%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
Type A - Brochures/Booklets	49,200		3.9%
Type B - Media Support	58,200		4.6%
Type C - Outreach	-		0.0%
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>107,400</b>		<b>8.4%</b>

**SOUTHERN CALIFORNIA EDISON  
NONRESIDENTIAL ENERGY AUDITS, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>			0.0%
Subtotal Financial Incentives	-		0.0%
<b>Itemized installation costs</b>			0.0%
Subtotal Installation costs	7,900		0.6%
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>	7,900		0.6%
<b>Itemized activity costs</b>			0.0%
Subtotal Activity costs	790,600		62.1%
<b>Rebate Processing/Inspection</b>			62.1%
Subtotal Rebate Processing/Inspection costs	-		0.0%
<b>Total Direct Implementation costs</b>	798,500		62.7%
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			
EM&V labor	-		0.0%
Subtotal EM&V Labor	-		0.0%
<b>Benefits</b>			
Pensions & Benefits	-		0.0%
Payroll Taxes	-		0.0%
Subtotal Benefits	-		0.0%
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking	-		0.0%
Type B - Other - Meals, lodging, misc. expenses	-		0.0%
Type C - Conference/Training Activities	-		0.0%
Subtotal Travel Costs	-		0.0%
<b>Reporting costs</b>			
Report 1 (consultant cost)	-		0.0%
Report 2 (consultant cost)	-		0.0%
Subtotal EM&V Reporting Costs	-		0.0%
<b>Materials &amp; Handling</b>			0.0%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	-		0.0%
Type B - Accounting Support	-		0.0%
Type C - Communications/Telecommunications/Automated Systems Support	-		0.0%
Type D - Human Resources Support	-		0.0%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	-		0.0%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	173,000		13.6%

**SOUTHERN CALIFORNIA EDISON  
NONRESIDENTIAL ENERGY AUDITS, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
<b>Itemized, may include:</b>			
<b>Financing Costs</b>	-		0.0%
<b>Bonding Costs</b>	-		0.0%
<b>Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)</b>	(476,400)		-37.4%
<b>Budget Grand Total</b>	\$ 1,272,900		100.0%

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requiremen

Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.



# **Building Operator Certification and Training Program Implementation Plan**

## **1. Title of Individual Program**

Building Operator Certification and Training Program

## **2. Plans to Implement this Decision's Changes to Original Proposal**

### **2.1 Program Summary**

The Building Operator Certification (BOC) and Training Program is a uniform statewide building operator training and certification program. Operators of medium and large commercial buildings (including governmental and institutional buildings and complexes) are the primary target group for this program. The program seeks to train operators of these buildings to identify and implement energy savings opportunities as an integral part of their operations and maintenance activities.

The program goal is to offer a uniform statewide building operator certification program designed to educate building operators on every major energy-using operating system in their facilities and certify their knowledge of building operations and maintenance. The goal of certification is to provide a recognized award to the participating building operators, which adds value to their jobs and recognition by their supervisors and throughout the state of California.

Building operators will learn to get the most out of their systems by improving their analytical and practical skills on the job. The training will include equipment operations, the latest methods of building operation and maintenance and how to incorporate energy efficiency opportunities. These opportunities range from installing more energy efficient equipment to proper maintenance of existing equipment for more efficient operations. The knowledge gained from this training program is expected to improve facility operations in both the short-term and long-term post-class periods. The increased awareness of energy saving knowledge for the building operator community will generate demand and energy savings statewide.

The training curricula would cover subjects pertaining to the equipment and day-to-day operations encountered by building operators. Classroom homework would require participants to identify energy saving opportunities at their facilities. The proposed curriculum is planned to include, but is not limited to, the following subjects:

- Facility Operations and Maintenance
- Lighting
- Heating, Ventilating and Air Conditioning (HVAC) System Design
- HVAC and Lighting Control Systems
- Boiler and Hot Water Systems
- Motors and Drives

- Energy Management Systems
- Power Quality
- Indoor Air Quality
- Energy Efficiency

The investor-owned utilities (IOUs) are currently reviewing different course materials and delivery options to meet the proposed curriculum.

Per Decision 02-03-056 Ordering Paragraph 13, the CPUC would retain ownership of the curricula and other aspects of the BOC program. However, the IOUs' objective is to select a certification program with existing materials, therefore, the IOUs believe the CPUC may not be entitled to ownership of these materials. If the selected certification program requires payment of a license fee to use the program and materials then continued use of these materials in future program years may be available as long as the administrator pays the appropriate license fees. If new training materials need to be developed for this program, the IOUs will notify the selected third party, as part of the contracting process, that the California Public Utilities Commission (CPUC) will retain ownership of the curricula and other aspects of the training material.

There will be testing of all participants to evaluate the amount of knowledge retained by the participants. These tests will be designed to confirm the participant's mastery of the subject material. If the participant completes all courses and passes all course tests, they will receive a certification at the end of the training program.

A certificate of course completion and recognition will be awarded to all students that successfully complete this training program and the required testing. This certificate provides documentation and recognition that the recipient has achieved a high level of knowledge in facility operations and building management. The participants in the certification program for program year 2002 are expected to complete the course curriculum in approximately seven months. This implies that the IOUs' implementation of this program will be completed in the first quarter of 2003.

Following is the proposed timeline of activities for this program:

<b>Project Tasks</b>	<b>Timeline</b>
Develop statewide standards	March – April 2002
Submit standards to CPUC	April 22, 2002
Competitively bid curricula	After CPUC approval
Program roll-out	Within 30 days after CPUC approval
Recruit and train instructors	May – June 2002
Schedule and recruit participants	May – June 2002
First training course	July 2002
Second training course	August 2002
Third training course	September 2002
Fourth training course	October 2002
Fifth training course	November 2002
Sixth training course	December 2002
Seventh training course	January 2003
Issue BOC certificates	February 2003

The IOUs jointly developed standard training curricula, testing and other certification standards in consultation with the Energy Division. The IOUs submitted the BOC program curricula, testing and certification standards to the CPUC on April 22, 2002 per direction from the CPUC. After the CPUC or assigned Commissioner has approved the standard criteria, the IOUs will solicit competitive bids for the BOC training. The IOUs will ensure the subcontractors implement the program consistent with the approved standards. The IOUs will target the program roll out to begin within 30 days after CPUC or assigned Commissioner has approved the BOC standards and no later than July 2002.

### **3. Revised Energy and Peak Demand Savings Targets**

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

### **4. Cost-Effectiveness**

There is no estimate of energy, capacity, therm savings, or cost effectiveness for this information program. Although it is the intention of each energy efficiency program to encourage the efficient utilization of electricity and/or natural gas, the calculations performed for the 2002 program cost-effectiveness utilize energy, capacity, and therm savings estimates for measures and programs for which there is a lower degree of speculation. The lack of energy savings, capacity savings, therm savings, resource benefits, or a TRC ratio for any particular program (i.e., information programs) should not imply that a measure or program does not promote energy efficiency nor should it imply that there is not an impact to the customer's use of electricity or natural gas or a corresponding impact to the electricity or natural gas system. However, pursuant to the CPUC's approved Energy Efficiency Policy Manual (Policy Manual),

this proposal for an information-only program is not reasonably expected to provide an estimate of energy savings.

**5. Evaluation Program Progress For Information-only Programs**

- Enroll a minimum of 75 students in the BOC training course in 2002. This goal will be tracked by tabulating the number of students who sign up for the training session.
- Offer 3 training course sessions of the BOC program. This goal will be tracked by tabulating the number of training course sessions offered in 2002.

**6. Hard-to-Reach Targets**

This program targets building operators of medium and large commercial facilities and is not designed for the small hard-to-reach (HTR) business customer. Interested HTR nonresidential customers may participate in the training program if they have a building operator for their facility. There is no HTR goal for this program, but the IOUs will encourage eligible HTR customers to participate in this training.

**7. Budget**

<b>Program</b>	<b>2002 Budget</b>
Builder Operator Certification and Training Program	<b>\$500,000</b>

Notes:

Program budget does not include EM&V activities funded from the statewide EM&V budget.

See, Attachment B for a detailed budget.

**8. Payment Schedule**

The CPUC has adopted this program for the remaining nine months of calendar year 2002 thus the payment of funds to the sponsoring utility will be collected during the second, third and fourth quarter of 2002. This payment schedule is abbreviated from the two-year schedule outlined in CPUC's Energy Efficiency Policy Manual in recognition of the program's limited nine-month implementation period.

# **Attachment A: Measure Forecast Table**

**Not Applicable**

# **Attachment B: Program Budget**

**SOUTHERN CALIFORNIA EDISON  
BUILDING OPERATOR CERTIFICATION TRAINING**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	60,800		11.6%
Benefits	34,000		6.5%
Travel/Conference/Training	5,800		1.1%
Reporting/Tracking/Development - Information Services	50,000		9.5%
Materials & Handling	20,000		3.8%
Overhead and General and Administrative costs	23,400		4.5%
Subcontractor Administrative costs	86,000		16.4%
<b>Total Administrative Costs</b>	<b>280,000</b>		<b>53.3%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>55,000</b>		<b>10.5%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	-		0.0%
Installation costs	-		0.0%
Activity costs	224,000		42.7%
Rebate Processing/Inspection	-		0.0%
<b>Total Direct Implementation costs</b>	<b>224,000</b>		<b>42.7%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>26,000</b>		<b>5.0%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(60,000)		-11.4%
<b>Budget Grand Total</b>	<b>\$ 525,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, etc. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

**SOUTHERN CALIFORNIA EDISON  
BUILDING OPERATOR CERTIFICATION TRAINING**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
<b>Labor</b>			
Type A - Program Planning/Design/Program Mgmt.	\$ 60,800		12.2%
Type B - Mgmt./Supervisor	-		0.0%
Type C - Clerical Support	-		0.0%
Subtotal Labor	60,800		
<b>Benefits</b>			
Pensions & Benefits	29,500	48.6% of SCE Labor	5.9%
Payroll Taxes	4,500	7.4% of SCE Labor	0.9%
Subtotal Benefits	34,000		6.8%
<b>Travel/Conference/Training</b>			
Type A - Mileage and Parking	3,300		0.7%
Type B - Other - Meals, lodging, misc. expenses	-		0.0%
Type C - Conference/Training Activities	2,500		0.5%
Subtotal Travel costs	5,800		1.2%
<b>Reporting/Tracking/Development - Information Services</b>	50,000		10.0%
<b>Materials &amp; Handling</b>	20,000		4.0%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	7,400		1.5%
Type B - Accounting Support	5,600		1.1%
Type C - Communications/Telecommunications/Automated Systems Support	8,200		1.6%
Type D - Human Resources Support	2,200		0.4%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	-		0.0%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	23,400		4.7%
<b>Subcontractor Administrative costs (administrative only, report other subcontractor costs in the appropriate category)</b>			
Labor			0.0%
Benefits			0.0%
Overhead			0.0%
Travel costs			0.0%
Reporting costs			0.0%
Materials & Handling			0.0%
Overhead and General and Administrative costs			0.0%
Subtotal Subcontractor Administrative costs	86,000		17.2%
Profit			
<b>Total Administrative Costs</b>	<b>280,000</b>		<b>56.0%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
Type A - Brochures/Booklets	50,000		10.0%
Type B - Media Support	5,000		1.0%
Type C - Outreach	-		0.0%
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>55,000</b>		<b>11.0%</b>



**SOUTHERN CALIFORNIA EDISON  
BUILDING OPERATOR CERTIFICATION TRAINING**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>			0.0%
Subtotal Financial Incentives	-		0.0%
<b>Itemized installation costs</b>			0.0%
Subtotal Installation costs	-		0.0%
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>			
<b>Itemized activity costs</b>			
Conduct 3 separate training class series of 64 hours each @ \$58,000	174,000		34.8%
Training materials and books	25,000		5.0%
Subtotal Activity costs	199,000		39.8%
<b>Rebate Processing/Inspection</b>			
Subtotal Rebate Processing/Inspection costs	-		0.0%
<b>Total Direct Implementation costs</b>	<b>199,000</b>		<b>39.8%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			
EM&V labor			0.0%
Subtotal EM&V Labor	-		0.0%
<b>Benefits</b>			
Pensions & Benefits			0.0%
Payroll Taxes			0.0%
Subtotal Benefits	-		0.0%
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking			0.0%
Type B - Other - Meals, lodging, misc. expenses			0.0%
Type C - Conference/Training Activities			0.0%
Subtotal Travel Costs	-		0.0%
<b>Reporting costs</b>			
Report 1 (consultant cost)			0.0%
Report 2 (consultant cost)			0.0%
Subtotal EM&V Reporting Costs	-		0.0%
<b>Materials &amp; Handling</b>			0.0%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support			0.0%
Type B - Accounting Support			0.0%
Type C - Communications/Telecommunications/Automated Systems Support			0.0%
Type D - Human Resources Support			0.0%
Type E - Facilities Support			0.0%
Type F - Supervision			0.0%
Type G - Corporate Services			0.0%
Type H - Transportation Services, Shop Services			0.0%
Type I - Information Technology			0.0%
Type J - Procurement and Material Management			0.0%
Subtotal Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>26,000</b>		<b>5.2%</b>

**SOUTHERN CALIFORNIA EDISON  
BUILDING OPERATOR CERTIFICATION TRAINING**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
<b>Itemized, may include:</b>			
<b>Financing Costs</b>	-		0.0%
<b>Bonding Costs</b>	-		0.0%
<b>Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)</b>	(60,000)		-12.0%
<b>Budget Grand Total</b>	\$ 500,000		100.0%

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, and EMV Manual. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

# Emerging Technologies Implementation Plans

## 1. Title of Individual Program

Emerging Technologies

## 2. Plans to Implement this Decision's Changes to Original Proposals

### 2.1 Program Summary

The Statewide Emerging Technologies (ET) program is an information-only program that seeks to accelerate the introduction of energy efficient technologies, applications, and analytical tools that are not widely adopted in California. The program targets nonresidential customers, and is composed of two parts:

- Demonstration & Information Transfer, and the
- Emerging Technologies Coordinating Council (ETCC).

The Demonstration & Information Transfer portion of the program focuses on near-commercial and commercial energy efficient applications with low market penetration. Demonstration projects, conducted at either customer sites or in controlled environments, provide design, performance, and verification of novel energy efficient systems, helping to reduce the market barriers to their wider acceptance. The program's demonstration projects help to measure, verify, and document the potential future energy savings of specific applications in different market segments. Information Transfer efforts disseminate project results, and are customized to the targeted markets. A variety of means will be used, which may include:

- Detailed project reports,
- Design documentation,
- Professional and industry forums,
- Technical and non-technical publications,
- Trade journals,
- Trade shows,
- News stories,
- Video documentaries,
- Case Studies,
- Detailed project brochures and fact sheets,
- Newsletters,
- Site visits and tours,
- Internet web pages,
- Analytical tools,
- Community-based organizations,
- Workshops, Seminars, Conferences, and

- Mainstream energy efficiency programs such as the utilities statewide Express Efficiency, Standard Performance Contract, and third party offerings.

The ETCC is a statewide information exchange and coordination effort between Pacific Gas & Electric (PG&E), Southern California Edison (SCE), Southern California Gas (SoCalGas), and San Diego Gas & Electric (SDG&E), and the California Energy Commission's (CEC) Public Interest Energy Research (PIER) program. The CEC PIER program, like many other public and private research & development (R&D) efforts, develops, tests, and demonstrates products up to the end of the R&D cycle as illustrated in the typical product development and commercialization cycle in Figure 1. As shown in the diagram, the utilities ET efforts form an important link in the commercialization of energy efficient emerging natural gas and electric technologies and applications.

Each utility Statewide Emerging Technology program consists of activities that may be coordinated with other utilities and the CEC, and activities that are unique to each utility service territory and customer base. The efforts that each utility undertakes as part of the statewide ET program will be guided by the prioritization of their customer base needs, coordinated ETCC activities, technology readiness, and their approved program funding level. In particular, the ETCC coordination effort ensures an effective linkage between entities involved in either the development or delivery of new energy efficient technologies in California.

These efforts include working with members of the research and design communities, manufacturers, energy efficiency advocates, and customer groups including, but not limited to, EPRI, GTI, Universities, E-Source, CIEE, ARI, ASHRAE, IES, IEEE, national laboratories, DOE, EPA, NASA, engineering firms, industry and trade groups, etc.

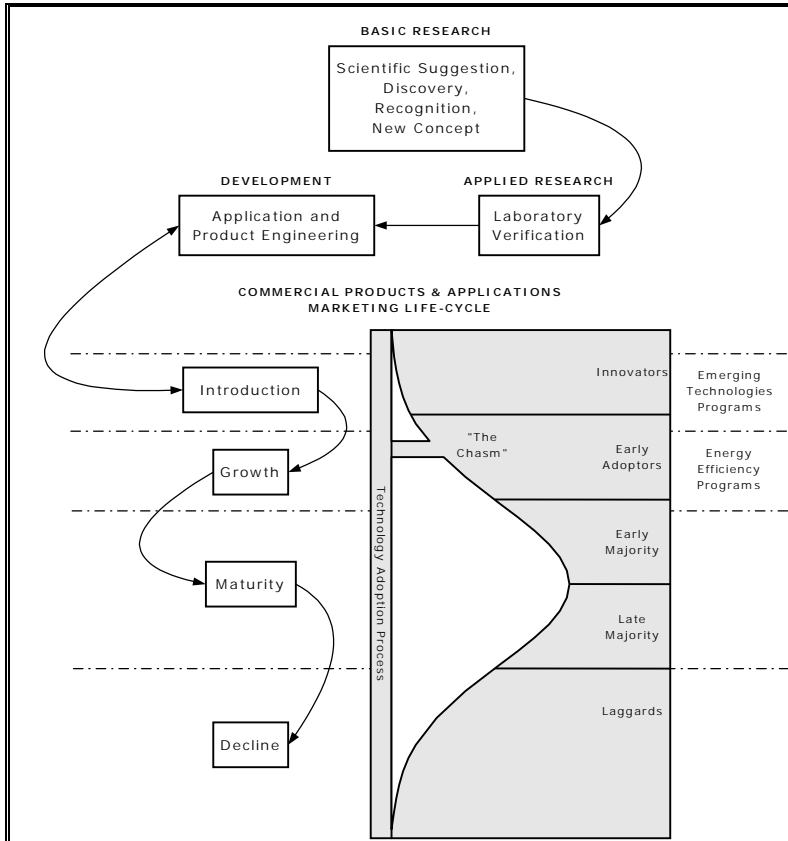


Figure 1. Typical Product Development & Commercialization Cycle.

## 2.2 Implementation Plans

At the beginning of the 2<sup>nd</sup> Quarter of 2002, the ETCC will meet to develop an updated list of energy efficient natural gas and electric emerging technologies, products, processes and system improvements, etc. The updated list will more thoroughly identify the technologies evolving through the PIER program. The list will be used to update the Emerging Technologies Database available on the ETCC web site (<http://www.ca-etcc.com/>). The ETCC will assess whether each energy efficient emerging technology application has reached an appropriate stage of maturity for the utilities to consider them in their Statewide Emerging Technologies Programs efforts. Some emerging technology applications may be

best evaluated through a local utility ET program opportunity initially. The status of the emerging technology application will be included in the ET Database listings. In addition, to better monitor PIER progress, utility staff members will attend the PIER project meetings as often as possible. This will allow the utilities to remain current of PIER project changes and developments.

In addition, the utilities will present to the ETCC a list of energy efficient emerging technologies identified and developed through research projects from various technical organizations, such as ASHRAE, DOE, GTI, EPRI, etc., along with their targeted applications. These emerging technology applications will also be added to the ET Database. Thus, the ETCC will create and maintain a comprehensive list of energy efficient emerging technologies and their applications, and track their market readiness.

Once the emerging technologies database is updated, the ETCC will evaluate the risk factors associated with the various emerging technologies. The utilities envision the ET database as a useful clearinghouse of information for a wide variety of stakeholders and interested parties. It is important to note that the less mature a technology is, the higher the risk that the technology may fail in an application. The identified risks will be among the many factors that the utilities will use to select technology applications for demonstration projects, and will help establish project contingency requirements.

*Delivery Approach.* The utilities will deliver the Statewide ET program to their customers through custom demonstration projects. Information Transfer will be disseminated through many different outlets, including the Energy Centers, utility personnel, community organizations, etc. The Information Transfer activities will leverage the utilities overall energy efficiency communication efforts. Through the demonstration projects, comprehensive design methods and tools may be developed and disseminated, along with the performance information of the energy efficient emerging technology measures. The statewide ET program will pursue projects targeting the nonresidential retrofit market segments. Among the demonstrations, there will be projects targeting hard-to-reach nonresidential customers, such as ethnic, small commercial customers. Figure 2 shows many of the considerations that go into demonstration projects at customer sites. These demonstration projects may come about in one of two manners:

- *Customer “Pull.”* A utility account representative may approach the program staff on behalf of a customer interested in pursuing energy efficiency. The ET program staff will help the account representative address the customer’s needs, and at the same time, consider a range of potential energy efficient emerging technology applications.
- *Technology “Push.”* The second manner that a project may come about is when a significant new technology application emerges. ET program staff then approach the utility account representatives for a particular market segment, inform them about the new technology application, and ask them to help identify a potential demonstration site from among their customers.

As is evident from the above discussion, the program does not follow a mass marketing approach, but a targeted approach to work with “innovators” that may further influence other customers.

Some projects may not require a field demonstration at a customer site to evaluate equipment performance. But even for those types of projects, the ET program staff seeks to understand customer’s needs and requirements. This helps ensure that project objectives are aligned with customer needs and expectations.

Before a customer site demonstration project can take place, a legal agreement acceptable to both the customer and the utility is developed, negotiated, and signed. These agreements specify the terms of the projects, maximum duration, dispute resolution methods, termination provisions, general liability, etc. It is important to note that some demonstration projects may require up to three years to complete, commencing on the date an agreement is signed with a customer. The time required to complete a project will vary due to how complex a new technology application is, construction schedules, building and process commissioning, logistics, etc.

Despite careful planning and screening of emerging technology applications and customer sites, not all demonstration projects can be expected to be successful. Thus, project contingency plans are set to address problems if the project's outcome is not satisfactory and to lessen customer losses.

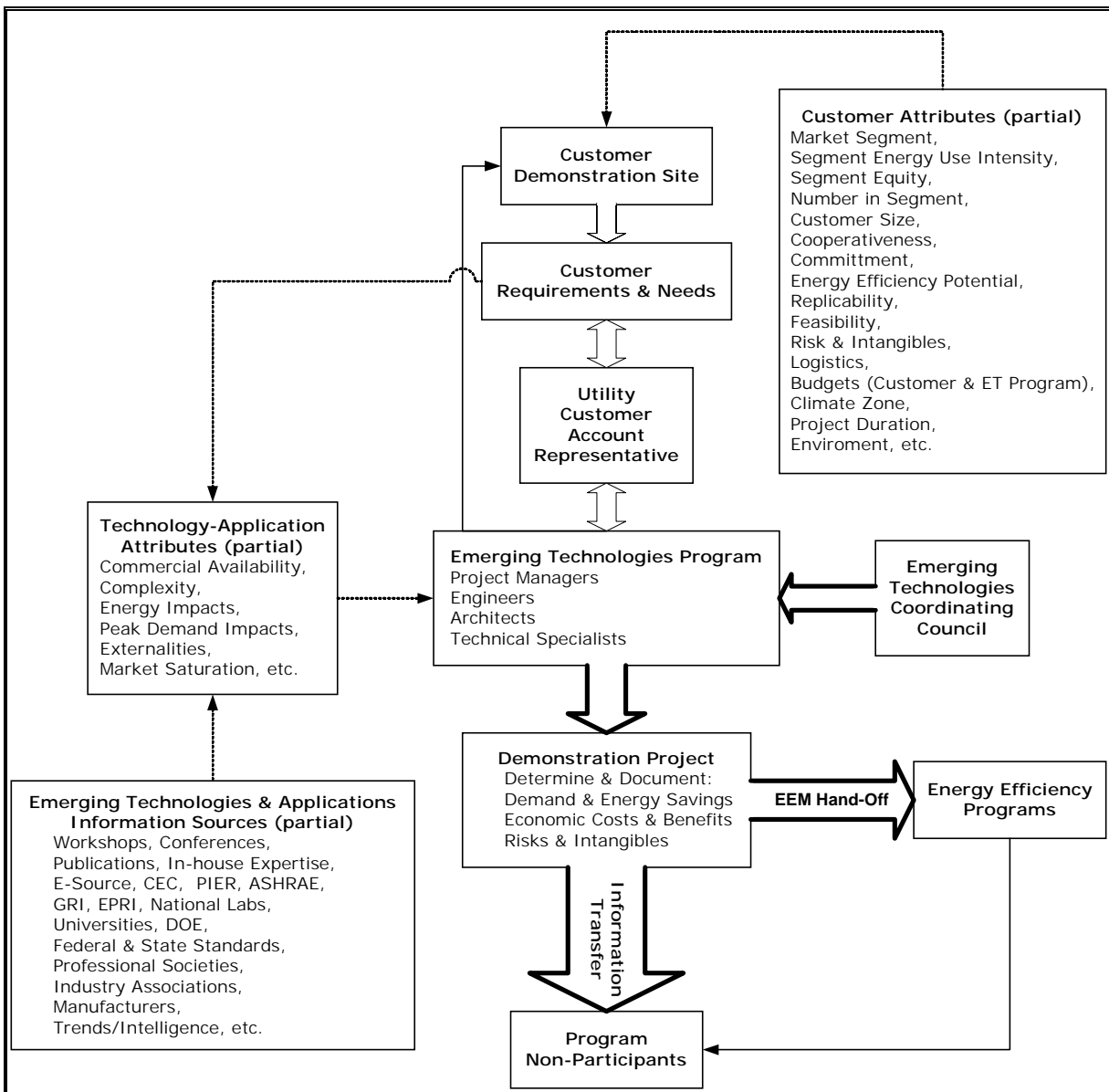


Figure 2. ET Program Demonstration Process.

*Program Synergies and Coordination.* The program's Information Transfer will be coordinated with the utilities Energy Centers and leveraged with the overall energy efficiency programs efforts. Also, it is important to note that SCE, under the Local Crosscutting category, proposed for local emerging technologies demonstration program. In SCE's case, the Local Demonstration & Information Transfer program, if adopted, will allow SCE to address other market segments, such as residential and new construction, besides the nonresidential retrofit market targeted through the statewide efforts.

Also, to ensure that ET applications that are ready to be part of energy efficiency statewide programs are indeed recognized by program planners, i.e., the energy efficiency measure (EEM) handoff shown in Figure 2, the ETTC will sponsor annual "ET Briefings" for program planners. The briefings will take place before the energy efficiency program planning efforts get underway for program year 2003.

*Evaluation, Measurement and Verification.* Statewide studies, funded through the statewide Market Assessment & Evaluation budget when approved, will evaluate the Statewide ET program success through a market assessment study. The study will measure indicators of program effectiveness and overall success, and test the assumptions underlying the program theory. A process evaluation, also funded through the Statewide Market Assessment & Evaluation budget when approved, will provide ongoing feedback and corrective guidance regarding program design and implementation.

### **3. Energy and Peak Demand Savings Targets**

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

### **4. Cost-Effectiveness**

There is no estimate of energy, capacity, therm savings, or cost effectiveness for this information program. Although it is the intention of each energy efficiency program to encourage the efficient utilization of electricity and/or natural gas, the calculations performed for the 2002 program cost-effectiveness utilize energy, capacity, and therm savings estimates for measures and programs for which there is a lower degree of speculation. The lack of energy savings, capacity savings, therm savings, resource benefits, or a TRC ratio for any particular program (i.e., information programs) should not imply that a measure or program does not promote energy efficiency nor should it imply that there is not an impact to the customer's use of electricity or natural gas or a corresponding impact to the electricity or natural gas system. However, pursuant to the CPUC's approved Energy Efficiency Policy Manual, this proposal for an information-only program is not reasonably expected to provide an estimate of energy savings.



## 5. Evaluating Program Progress For Information-only Programs

The Statewide Emerging Technologies Program progress will be measured through the following two metrics:

- **Southern California Edison will perform eight Emerging Technology application assessments.** The technology-application assessments may consist of a diversity of project types including: feasibility studies, simulation analysis, field demonstrations, controlled environment tests, commercial product development, design methodologies and tool development. These assessments may take up to three years to complete.
- **Update the Emerging Technology Database.** The list of emerging technology applications on the Emerging Technology Coordinating Council website ([www.ca-etcc.com](http://www.ca-etcc.com)) will be updated semi-annually.

## 6. Hard-to-Reach Targets

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

## 7. Budget

Program	2002 Budget
Statewide Emerging Technologies Program	\$650,000

Notes:

Program budget includes EM&V activities funded from the statewide EM&V budget. See, Attachment B for a detailed budget.

## 8. Payment Schedule

The CPUC has adopted this program for the remaining nine months of calendar year 2002 thus the payment of funds to the sponsoring utility will be collected during the second, third and fourth quarter of 2002. This payment schedule is abbreviated from the two-year schedule outlined in CPUC's Energy Efficiency Policy Manual in recognition of the program's limited nine-month implementation period.

**Attachment A: Measure Forecast Table**

**Not Applicable**

## **Attachment B: Program Cost**

**SOUTHERN CALIFORNIA EDISON  
EMERGING TECHNOLOGIES**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	182,100		28.0%
Benefits	89,200		13.7%
Travel/Conference/Training	4,800		0.7%
Reporting/Tracking/Development - Information Services	-		0.0%
Materials & Handling	38,300		5.9%
Overhead and General and Administrative costs	30,400		4.7%
Subcontractor Administrative costs	-		0.0%
<b>Total Administrative Costs</b>	<b>344,800</b>		<b>53.0%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>-</b>		<b>0.0%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	-		0.0%
Installation costs	-		0.0%
Activity costs	394,400		60.7%
Rebate Processing/Inspection	-		0.0%
<b>Total Direct Implementation costs</b>	<b>394,400</b>		<b>60.7%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>80,000</b>		<b>12.3%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(169,200)		-26.0%
			0.0%
<b>Budget Grand Total</b>	<b>650,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, etc. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

**SOUTHERN CALIFORNIA EDISON  
EMERGING TECHNOLOGIES**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
<b>Labor</b>			
Type A - Program Planning/Design/Program Mgmt.	\$ 168,400		25.9%
Type B - Mgmt./Supervisor	-		0.0%
Type C - Clerical Support	13,700		2.1%
Subtotal Labor	182,100		28.0%
<b>Benefits</b>			
Pensions & Benefits	77,400	48.6% of SCE Labor	11.9%
Payroll Taxes	11,800	7.4% of SCE Labor	1.8%
Subtotal Benefits	89,200		13.7%
<b>Travel/Conference/Training</b>			
Type A - Mileage and Parking	1,900		0.3%
Type B - Other - Meals, lodging, misc. expenses	1,900		0.3%
Type C - Conference/Training Activities	1,000		0.2%
Subtotal Travel costs	4,800		0.7%
<b>Reporting/Tracking/Development - Information Services</b>			
<b>Materials &amp; Handling</b>			
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	9,600		1.5%
Type B - Accounting Support	7,200		1.1%
Type C - Communications/Telecommunications/Automated Systems Support	10,800		1.7%
Type D - Human Resources Support	2,800		0.4%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	-		0.0%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	30,400		4.7%
<b>Subcontractor Administrative costs (administrative only, report other subcontractor costs in the appropriate category)</b>		provide total subcontractor costs (if have more than one)	
Labor			0.0%
Benefits			0.0%
Overhead			0.0%
Travel costs			0.0%
Reporting costs			0.0%
Materials & Handling			0.0%
Overhead and General and Administrative costs			0.0%
Subtotal Subcontractor Administrative costs			0.0%
Profit			0.0%
<b>Total Administrative Costs</b>	<b>344,800</b>		<b>53.0%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
Type A - Brochures/Booklets	-		0.0%
Type B - Media Support	-		0.0%
Type C - Outreach	-		0.0%
Total Marketing/Advertising/Outreach Costs	-		0.0%

SOUTHERN CALIFORNIA EDISON  
EMERGING TECHNOLOGIES, Cont'd

Program Budget Detail

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>			0.0%
Subtotal Financial Incentives	-		0.0%
<b>Itemized installation costs</b>			0.0%
Subtotal Installation costs	-		0.0%
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>			0.0%
<b>Itemized activity costs</b>			
8 Emerging Technology Applications @ \$50,000 each	394,400		60.7%
Subtotal Activity costs	394,400		60.7%
<b>Rebate Processing/Inspection</b>			0.0%
Subtotal Rebate Processing/Inspection costs	-		0.0%
<b>Total Direct Implementation costs</b>	394,400		60.7%
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			
EM&V labor			0.0%
Subtotal EM&V Labor	-		0.0%
<b>Benefits</b>			
Pensions & Benefits			0.0%
Payroll Taxes			0.0%
Subtotal Benefits	-		0.0%
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking			0.0%
Type B - Other - Meals, lodging, misc. expenses			0.0%
Type C - Conference/Training Activities			0.0%
Subtotal Travel Costs	-		0.0%
<b>Reporting costs</b>			
Report 1 (consultant cost)			0.0%
Report 2 (consultant cost)			0.0%
Subtotal EM&V Reporting Costs	-		0.0%
<b>Materials &amp; Handling</b>			0.0%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support			0.0%
Type B - Accounting Support			0.0%
Type C - Communications/Telecommunications/Automated Systems Support			0.0%
Type D - Human Resources Support			0.0%
Type E - Facilities Support			0.0%
Type F - Supervision			0.0%
Type G - Corporate Services			0.0%
Type H - Transportation Services, Shop Services			0.0%
Type I - Information Technology			0.0%
Type J - Procurement and Material Management			0.0%
Subtotal Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	80,000		12.3%

**SOUTHERN CALIFORNIA EDISON  
EMERGING TECHNOLOGIES, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
<b>Itemized, may include:</b>			
<b>Financing Costs</b>	-		0.0%
<b>Bonding Costs</b>	-		0.0%
<b>Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)</b>	(169,200)		-26.0%
<b>Budget Grand Total</b>	650,000		100.0%

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, and the EMV Manual. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

# Savings By Design Implementation Plan

## 1. Title of Individual Program

Savings By Design

## 2. Plans to Implement this Decision's Changes to Original Proposals

### 2.1 Program Summary

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

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

**Whole-Building Approach:** As SBD's core intervention strategy, this approach promotes integrated, or whole building, design methodology. It provides design assistance and escalating incentives to both owners and design teams to maximize the energy efficiency of their projects. This approach allows an owner or design team to incorporate energy efficiency measures and systems into a particular project and provides the means for incorporating energy considerations into every part of the design process. The approach requires early project involvement, design team and owner commitment, and detailed energy and financial analysis. It is fuel neutral and can be applied to industrial and agricultural as well as commercial projects.

**Systems Approach:** The Systems Approach moves the decision-makers involved with less complex buildings to a higher level of design integration. The objective of this approach is to provide the decision-makers the incentive to identify and understand the long-term operational savings of energy-efficient design. This simplified performance-based approach is flexible enough to affect last minute project changes in order to maximize program market penetration and minimize lost opportunities.



**Education and Outreach:** The education and outreach element included in SBD supports both program approaches and integrates with energy center, academic, collaborative, and Codes and Standards efforts. This supporting element includes, through the Energy Design Resources (EDR) element, case studies and technology briefs, energy and design analysis tools, industry collaboration and design awards, training opportunities and support for forward-looking code enhancement. Development and dissemination of this type of broad-based design information in the marketplace is essential to the success of a fully functioning integrated-design program.

**Program Process:** Utility Marketing and Outreach

For 2002, SBD will continue and expand successful marketing and outreach activities, including:

- Reliance on existing and expanding customer relationships to provide early influence and involvement;
- Use of common statewide brochures, uniform program documents, and consistent procedures to reduce the potential for customer confusion and leverage participation opportunities throughout the state;
- Operation and expansion of the statewide SBD and EDR Web sites to promote program participation and integrated design practice;
- Design and delivery of training and educational opportunities in conjunction with allied industries, energy centers, and professional organizations;
- Partnering with the American Institute of Architects, California Council, to recognize outstanding energy-efficiency design through a cosponsored design awards program, the 2002 Savings By Design Energy Efficiency Integration Awards;
- Support for other effective industry alliances, governmental and industry collaborations, and energy-related initiatives; and
- Coordinated delivery of targeted messages through industry publications.

**Program Operation:** Program Participation

To participate in the SBD program:

- Customers, design teams, or utilities' representatives may initiate program participation.
- Customers/design teams submit a letter indicating their intent to participate and work with their SBD representative to determine how to maximize the efficiency of their project.
- Utility establishes eligibility. The program is available to all commercial, agricultural, and industrial customers within the service areas of Pacific Gas & Electric (PG&E), San Diego Gas and Electric (SDG&E), Southern California Edison (SCE) and Southern California Gas Company (SoCalGas) who pay electric and/or gas public goods charge.
- An SBD representative works with the participant to determine which program path (Whole-Building Approach or Systems Approach) applies.

- After energy efficiency enhancements are finalized, the SBD representative issues an agreement to the customer/design team delineating the proposed project details, incentive amounts, and terms and conditions.
- Customer/design team signs, dates, and returns the agreement to the SBD representative. Signing the agreement acknowledges that they have read and agree to all program eligibility requirements. The utility’s counter-signature and date indicate funds have been reserved for the project for a period of 36 months. Program funding is “first-come, first-served.”
- Once construction is substantially complete, the customer contacts the SBD representative to request an on-site verification.
- If the project is built as agreed and the customer meets all program requirements, the incentive is paid. If the installed equipment differs from that outlined in the incentive agreement, a recalculation of the incentive amount is performed and adjusted—up or down.
- The utility will not pay incentives on equipment and systems upon which the utility has paid, or has agreed to pay, incentive amounts under any other program. Such equipment and systems are not eligible for incentives under the SBD program.

**Inter-utility Coordination, Tracking, and Reporting:**

To provide program continuity and consistency, the utilities will:

- Work together to implement the program with owners, designers, and others in multiple service territories;
- Coordinate and share design analysis assumptions and baselines;
- Provide referral to appropriate utility for potential projects encountered that fall outside their own service area;
- Conduct onsite installation verification for all completed projects;
- Collect, track, and compile comparable project information and results; and
- Provide monthly, quarterly, and annual progress updates detailing program accomplishments and status.

Despite the considerable costs that inefficient designs impose on owners, property managers, and tenants, new construction projects rarely include comprehensive energy efficiency strategies. The elements of the 2002 SBD program proposed above adhere to the changes to the original SBD proposal ordered by the California Public Utilities Commission (CPUC) while providing balanced, integrated strategies that address and leverage existing and new market relationships and conditions. This balanced approach will further a vibrant market for energy efficiency in the nonresidential new construction marketplace. New construction offers a unique opportunity to capture what would otherwise be lost energy efficiency opportunities. The money saved by energy-efficient design, construction, and operation will encourage energy efficiency practices in new processes and new buildings.

### 3. Energy and Peak Demand Savings Targets

In compliance with Decision 02-03-056, Ordering Paragraph 14, each investor-owned utility (IOU) will reserve 50% of the direct implementation funds for projects that are the Whole-Building Approach.

Measure	Unit Defined	Forecast Units	Total Net kWh	Net kWh per unit	Total Net kW	Net kW per unit
Whole Building	Gross kWh	15,525,181	9,918,142	0.64	2,957	0.0001905
Systems Approach	Gross kWh	33,916,696	23,337,858	0.69	4,823	0.0001422
<b>Total</b>			<b>33,256,000</b>		<b>7,780</b>	

Note: Total net energy savings forecasts may differ from the energy savings targets provided in Decision 02-03-056.

### 4. Cost-Effectiveness

	Program Benefits	Program Costs	Net Benefits	Benefit/Cost Ratio
<b>Total Resource Cost Test</b>	\$24,456,000	\$10,052,625	\$14,403,375	2.43
<b>Participant Cost Test</b>	\$29,256,375	6,923,000	22,333,375	4.23

### 5. Evaluating Program Progress For Information-only Programs

Education, information, and outreach efforts are intrinsic to successful delivery of the SBD program. While the portion of budget dedicated to this purpose is delineated at varying levels within the budget tables, tracking and reporting for these activities will follow the same statewide procedure. SBD will track and report:

- A) On-line courses completed at the EDR Web site, with the goal of increasing completions by at least 100% over 2001 results.
- B) Custom project outreach efforts including design assistance, design charettes, on-site seminars, and project-specific integrated design training with the goal of maintaining 2001 training levels despite the 2002 reduced budget allocation.

### 6. Hard-to-Reach Targets

SBD will target geographically hard-to-reach (HTR) customers. To establish program impact on these market actors, the statewide group will track and report the number of projects from geographically HTR areas. SBD will pursue the goal of increasing the percentage of participating projects from geographically HTR customers by 25% over PY 2001 results. Chain

accounts, where design decisions are centralized through a single corporate entity, will not be included in the count. These HTR areas are defined in the CPUC's Energy Efficiency Policy Manual.

## 7. Budget

<b>Program</b>	<b>2002 Budget</b>
Nonresidential Savings By Design Program	<b>\$7,674,000</b>

Notes:

Program budget does not include EM&V activities funded from the statewide EM&V budget.

See, Attachment B for a detailed budget.

## 8. Payment Schedule

The CPUC has adopted this program for the remaining nine months of calendar year 2002, thus the payment of funds to the sponsoring utility will be collected during the second, third and fourth quarter of 2002. This payment schedule is abbreviated from the two-year schedule outlined in the CPUC's Energy Efficiency Policy Manual in recognition of the program's limited nine-month implementation period.

SBD is a multi-year program. Since the SBD program offers participants up to three to complete their projects, funding committed to new construction projects in 2002 may not be paid until 2005.

# **Attachment A: Measure Forecast Table**

<b>Measure</b>	<b>Unit Defined</b>	<b>Forecast Units</b>	<b>Rebate per unit</b>	<b>Total Rebate</b>
Whole Building	Gross kWh	15,525,181	\$0.17	\$2,580,175
Systems Approach	Gross kWh	33,916,696	\$0.07	\$2,220,200
<b>Total</b>				<b>\$4,800,375</b>

# **Attachment B: Program Budget**

**SOUTHERN CALIFORNIA EDISON  
SAVINGS BY DESIGN**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	231,900		3.0%
Benefits	364,200		4.7%
Travel/Conference/Training	54,600		0.7%
Reporting/Tracking/Development - Information Services	30,000		0.4%
Materials & Handling	14,000		0.2%
Overhead and General and Administrative costs	359,300		4.7%
Subcontractor Administrative costs	228,000		3.0%
<b>Total Administrative Costs</b>	<b>1,282,000</b>		<b>16.7%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>506,400</b>		<b>6.6%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	4,800,200		62.6%
Installation costs	-		0.0%
Activity costs	1,132,000		14.8%
Rebate Processing/Inspection	317,600		4.1%
<b>Total Direct Implementation costs</b>	<b>6,249,800</b>		<b>81.4%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>256,000</b>		<b>3.3%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(620,200)		-8.1%
<b>Budget Grand Total</b>	<b>7,674,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, etc. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.



**SOUTHERN CALIFORNIA EDISON  
SAVINGS BY DESIGN**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
<b>Labor</b>			
Type A - Program Planning/Design/Program Mgmt.	\$ 121,000		1.6%
Type B - Mgmt./Supervisor	96,300		1.3%
Type C - Clerical Support	14,600		0.2%
Subtotal Labor	231,900		3.0%
<b>Benefits</b>			
Pensions & Benefits	316,000	48.6% of SCE Labor	4.1%
Payroll Taxes	48,200	7.4% of SCE Labor	0.6%
Subtotal Benefits	364,200		4.7%
<b>Travel/Conference/Training</b>			
Type A - Mileage and Parking	26,600		0.3%
Type B - Other - Meals, lodging, misc. expenses	7,400		0.1%
Type C - Conference/Training Activities	20,600		0.3%
Subtotal Travel costs	54,600		0.7%
<b>Reporting/Tracking/Development - Information Services</b>			
	30,000		0.4%
<b>Materials &amp; Handling</b>			
	14,000		0.2%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	113,500		1.5%
Type B - Accounting Support	85,600		1.1%
Type C - Communications/Telecommunications/Automated Systems Support	127,200		1.7%
Type D - Human Resources Support	33,000		0.4%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	-		0.0%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	359,300		4.7%
<b>Subcontractor Administrative costs (administrative only, report other subcontractor costs in the appropriate category)</b>			
Labor	180,000		2.3%
Benefits	-		0.0%
Overhead	-		0.0%
Travel costs	-		0.0%
Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
Subtotal Subcontractor Administrative costs	180,000		2.3%
Profit	48,000		0.6%
<b>Total Administrative Costs</b>	<b>1,282,000</b>		<b>16.7%</b>

**SOUTHERN CALIFORNIA EDISON  
SAVINGS BY DESIGN, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Marketing/Advertising/Outreach Costs</b>			
Type A - Brochures/Booklets	25,000		0.3%
Type B - Media Support	26,900		0.4%
Type C - Outreach	454,500		5.9%
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>506,400</b>		<b>6.6%</b>
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>			
See, Attachment A, Measure Forecast Table	4,800,200		62.6%
Subtotal Financial Incentives	4,800,200		62.6%
<b>Itemized installation costs</b>			
Subtotal Installation costs	-		0.0%
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>			
<b>Itemized activity costs</b>			
450 Design Assistance projects @ \$2,515 each	1,132,000		14.8%
Subtotal Activity costs	1,132,000		14.8%
<b>Rebate Processing/Inspection</b>			
Process Application, Inspections (includes future years' costs)	317,600		4.1%
Subtotal Rebate Processing/Inspection costs	317,600		4.1%
<b>Total Direct Implementation costs</b>	<b>6,249,800</b>		<b>81.4%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			
EM&V labor			0.0%
Subtotal EM&V Labor	-		0.0%
<b>Benefits</b>			
Pensions & Benefits			0.0%
Payroll Taxes			0.0%
Subtotal Benefits	-		0.0%
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking			0.0%
Type B - Other - Meals, lodging, misc. expenses			0.0%
Type C - Conference/Training Activities			0.0%
Subtotal Travel Costs	-		0.0%
<b>Reporting costs</b>			
Report 1 (consultant cost)			0.0%
Report 2 (consultant cost)			0.0%
Subtotal EM&V Reporting Costs	-		0.0%
<b>Materials &amp; Handling</b>			
Subtotal Materials & Handling	-		0.0%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support			0.0%
Type B - Accounting Support			0.0%
Type C - Communications/Telecommunications/Automated Systems Support			0.0%
Type D - Human Resources Support			0.0%
Type E - Facilities Support			0.0%
Type F - Supervision			0.0%
Type G - Corporate Services			0.0%
Type H - Transportation Services, Shop Services			0.0%
Type I - Information Technology			0.0%
Type J - Procurement and Material Management			0.0%
Subtotal Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>256,000</b>		<b>3.3%</b>

**SOUTHERN CALIFORNIA EDISON  
SAVINGS BY DESIGN, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
<b>Itemized, may include:</b>			
<b>Financing Costs</b>	-		0.0%
<b>Bonding Costs</b>	-		0.0%
<b>Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)</b>	(620,200)		-8.1%
<b>Budget Grand Total</b>	\$ 7,674,000		100.0%

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, and the Standard Practice Manual, Reporting Requirements Manual. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

# Energy Efficiency Education And Training Implementation Plan

## 1. Title of Individual Program

Energy Efficiency Education And Training Program

## 2. Plans to Implement this Decision's Changes to Original Proposals

### 2.1 Program Summary

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

### 2.2 Energy Centers

Three of the four utilities possess physical energy centers: PG&E, SCE, and SoCalGas. SDG&E does not possess a physical center, however, they offer a number of energy efficiency classes to customers using other utility facilities or non-utility sites. The term "energy centers" in this Implementation Plan is inclusive of SDG&E in any discussion of seminars or classes.

PG&E has two distinct energy centers:

The *Pacific Energy Center (PEC)* opened in 1991 and is located in downtown San Francisco. It focuses on commercial end-use customers, and on the engineering and design communities in support of new construction programs.

The *Energy Training Center (ETC), Stockton* was founded in 1978 as a residential low income weatherization school. It is located in the geographically hard-to-reach Central Valley. The ETC's focus has evolved to also include mid and upstream residential market actors, including contractors, building inspectors, and retailers.

SCE has 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. It serves all commercial and industrial customers, from end-use to design and engineering.

The *Agricultural Technology Application Center (AGTAC)* opened in 1996 and is located in the heart of the northern agricultural region of the SCE service territory, the San Joaquin Valley. The center's focus is the agricultural community, although it also serves the commercial and industrial customers of the region.

SoCalGas has one energy center:

The Energy Resource Center (ERC) opened in 1995. Located in the City of Downey, it is conveniently accessible from Los Angeles County and Orange County. The facility showcases state-of-the-art technologies as well as offers seminars, meetings, workshops, demonstrations and presentations designed to yield greater energy savings opportunities for customers. While ERC's primary focus is on the non-residential market, it does serve the residential and new construction markets with programs targeted towards builders, contractors, and developers.

SDG&E Residential Information:

SDG&E provides residential marketing and outreach through distribution of printed brochures and fact sheets, SDG&E's web site and community event participation. Outreach to the hard-to-reach communities includes distribution of energy savings information at community events and targeting community based organizations to enhance the distribution and dissemination of information efforts to their customer base. The program is targeted to all natural gas and electric consumers, with special emphasis on the hard-to-reach audience, including the low-income population, seniors and non-English speaking audiences of diverse ethnic backgrounds. The material is presented in an easy to understand language at an average comprehension level in English, Spanish and Vietnamese.

SDG&E's Energy Information Center (EIC) provides residential and nonresidential customers with detailed information related to various utility energy efficiency programs and services. Customers who call the EIC obtain information on both utility programs and services. In addition trained representatives explain program eligibility requirements and qualify customers for program participation.

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

In the following program descriptions, the term "energy centers" is used. Reference to physical features of the centers involves PG&E, SCE, and SoCalGas only. Reference to seminars, upstream training and other informational materials includes SDG&E and PG&E.

### **2.3 Program Objectives**

Two primary objectives of the energy centers are: 1) to disseminate information about energy efficient equipment and practices to utility customers for the purpose of assisting them to reduce energy usage, lower their bills, reduce operation and maintenance costs, and improve their productivity; and, 2) to provide services to a variety of market actors, architects, engineers, distributors, and contractors who use information and tools to design more efficient buildings or processes and to conduct energy efficiency retrofits and renovations. The centers also support other Public Goods Charge programs through the distribution of incentive and financing program promotional materials, providing field support, seminars, displays, equipment demonstrations

and face-to-face contact with customers in a variety of venues, which can include trade shows and community meetings.

The centers collect, transfer, research, evaluate, demonstrate and showcase energy efficiency concepts, technologies, and products for manufacturers, businesses, researchers, educational institutions and the general public. They are a physical “one-stop shop” for the customer, a single-source contact to an abundance of energy efficiency resources.

The centers will continue to disseminate information about energy efficient technologies and practices to customers and the market place, covering both the residential and nonresidential markets. This is done primarily at the center facilities through education in the form of seminars, workshops, displays, demonstrations, technical consultations, facility presentations, fact sheets, and brochures. In addition, information is provided by taking specific seminars and presentations to offsite locations using community organizations, local government and trade associations as channels to a variety of constituencies.

Activities at the centers and at SDG&E will not change substantively in 2002 from 2001. Additional emphasis will be put toward creating programs for the hard-to-reach market as defined in the Energy Efficiency Policy Manual. Promotion of the centers’ activities will be enhanced to more specifically include this market, although not to the exclusion of larger or urban customers, whose use of energy is substantial.

There are core seminars and workshops on which the centers have consistently relied to educate their markets. These include Commercial and Industrial Lighting, HVAC for Commercial Facilities, building envelope designs, daylighting, Motors/Adjustable Speed Drives, Energy Efficient Refrigeration, Prime Movers (Water Pumping Applications), Lighting Fundamentals, Benefits of Agricultural Pump Tests, Groundwater Wells & Pumps, Residential and Non-residential Title 24 Compliance, Residential HVAC Quality Installation, and others. More specialized topics include Compressors/Air Leak Certification, HVAC Sizing and Duct Design, Energy Efficiency for Schools, and the Clean Water Conference. In 2002, the centers will work to further expand their offerings.

#### **2.4 Partnerships with Third Parties**

The centers continue to seek collaboration with a wide variety of market actors, governmental agencies, educational institutions, and community groups in order to leverage their educational and informational efforts to larger audiences. Since inception, the centers have partnered with numerous vendors and manufacturers, as well as trade and educational organizations to provide customers and key market actors with up-to-date information to assist them in making decisions that reduce their energy costs, increase productivity, and improve installation quality. Manufacturers or vendors have provided much of the equipment on display at the centers. Subject matter experts from a substantial number of non-utility entities provide instruction and/or consultation for seminars, displays, demonstrations, and printed information provided to customers. Third parties also often make use of the centers to facilitate their own energy efficiency activities.

## **2.5 Exhibits and Displays**

Supporting the educational curriculum at the centers are exhibits and displays that range from showcasing equipment to demonstrating technologies in specific applications. Their presence at the center reinforces information provided by seminars and workshops and provides information in areas that may span beyond what is contained in a specific class that a customer attends. They create an atmosphere of specialized knowledge in energy issues, which lends credibility to the available information. In addition to the displays at the energy centers, the Outreach program also has portable exhibits and demonstration equipment that can be utilized at trade shows, offsite seminars, and community events, which allows for the dissemination of information to a large number of attendees at one specific event.

Staff at the centers will continue to be available to provide consultation to customers and market actors regarding their energy information needs, insuring that they are advised in the most energy efficient methods to meet those needs. This is done in person, by phone, and by e-mail, both direct and web site generated.

At the energy centers, literature is provided and graphics and signage are designed to make connections for the customer between the exhibits and displays and other available Public Goods Charge programs. Links are also created between seminar materials and available programs to insure customers attending seminars are aware of those offerings.

## **2.6 Marketing and Outreach**

The centers use a variety of methods to market their offerings such as those listed below.

- Semi-annual and quarterly calendars are mailed listing the seminars available for that three-month period.
- Flyers are used to market specific seminars to targeted markets.
- Seminars are listed on the utilities' web sites and also on [www.energyefficiencycenter.com](http://www.energyefficiencycenter.com).
- Descriptions of the technical centers, exhibits and demonstration capabilities are detailed on the web sites.
- General pamphlets and brochures list and briefly describe all the services available at the centers.
- Account Managers describe the centers' capabilities to customers and often hold customer meetings there to expose the customers directly to energy efficiency information.
- The centers are made available to customers as a venue for their own meetings and events, also providing exposure to the information in the centers.

## **2.7 Statewide Collaboration**

Energy centers' statewide collaboration will continue by enhancing the sharing of course materials and classes, instructors, and advertising. The sharing of these resources insures a more consistent energy efficiency message within the state. Also, shared training materials can reduce development costs, dependent on the subject and needs of the specific target audience.

In 2002, unlike prior years, this collaborative scope will include SDG&E. Although SDG&E does not have a physical energy center, they provide a variety of energy efficiency seminars to customers. Their offerings will be combined with those of the other three utilities and relevant seminars will be shared across the state. Also, the utilities will insure that the registration process is consistent among the utilities; and, all energy efficiency seminars at any location will be offered at no charge to participating customers.

Another expanded aspect of this statewide collaboration will be the sharing of marketing materials. Each of the four utilities will make available to customers the calendars and marketing flyers of the other utilities. In addition, each physical center will supply a list of their exhibits and displays so that customers who might desire to see specific types of exhibits can be referred to the host location(s).

Seminar information will also be posted on the [www.energyefficiencycenter.com](http://www.energyefficiencycenter.com) web site, which was established in 2000 as a collaborative effort of SoCalGas, SCE, and PG&E. The site lists all current seminar offerings and provides links to the web sites of each center. SDG&E will be added to the site. To increase its effectiveness, each utility will include a link on its own web site to the [www.energyefficiencycenter.com](http://www.energyefficiencycenter.com) site, and will cross-reference access to other utilities' seminar calendars.

### **3. Energy and Peak Demand Savings Targets**

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

### **4. Cost Effectiveness**

There is no estimate of energy, capacity, therm savings, or cost effectiveness for this information program. Although it is the intention of each energy efficiency program to encourage the efficient utilization of electricity and/or natural gas, the calculations performed for the 2002 program cost-effectiveness utilize energy, capacity, and therm savings estimates for measures and programs for which there is a lower degree of speculation. The lack of energy savings, capacity savings, therm savings, resource benefits, or a TRC ratio for any particular program (i.e., information programs) should not imply that a measure or program does not promote energy efficiency nor should it imply that there is not an impact to the customer's use of electricity or natural gas or a corresponding impact to the electricity or natural gas system. However, pursuant to the California Public Utilities Commission's (CPUC) approved Energy Efficiency Policy Manual, this proposal for an information-only program is not reasonably expected to provide an estimate of energy savings.



## 5. Evaluating Program Process For Information-only Programs

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

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

## 6. Hard-to-Reach Targets

Program year 2002 is the first in which the educational efforts of all the IOUs will include targeting the hard-to-reach customer. Undoubtedly, these customers have always been included in the "mix" of customers served by the energy centers.

During the 2002 program year, each of the utilities will develop methods of tracking the participation of this market group in its education programs, based on the definition provided in the Energy Efficiency Policy Manual. In addition, SCE proposes the following HTR target:

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

## 7. Budget

<b>Program</b>	<b>2002 Budget</b>
Energy Efficiency Education And Training Program	<b>\$3,813,000</b>

Notes:

Program budget does not include EM&V activities funded from the statewide EM&V budget. See, Attachment B for a detailed budget.

## 8. Payment Schedule

The CPUC has adopted this program for the remaining nine months of calendar year 2002 thus the payment of funds to the sponsoring utility will be collected during the second, third and fourth quarter of 2002. This payment schedule is abbreviated from the two-year schedule outlined in CPUC's Energy Efficiency Policy Manual in recognition of the program's limited nine-month implementation period.

# **Attachment A: Measure Forecast Table**

**Not Applicable**

# **Attachment B: Program Budget**

**SOUTHERN CALIFORNIA EDISON  
EDUCATION & TRAINING**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	1,133,700		29.7%
Benefits	974,900		25.6%
Travel/Conference/Training	88,500		2.3%
Reporting/Tracking/Development - Information Services	18,400		0.5%
Materials & Handling	231,300		6.1%
Overhead and General and Administrative costs	178,000		4.7%
Subcontractor Administrative costs	54,400		1.4%
<b>Total Administrative Costs</b>	<b>2,679,200</b>		<b>70.3%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>274,900</b>		<b>7.2%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	-		0.0%
Installation costs	-		0.0%
Activity costs	1,833,800		48.1%
Rebate Processing/Inspection	-		0.0%
<b>Total Direct Implementation costs</b>	<b>1,833,800</b>		<b>48.1%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>104,000</b>		<b>2.7%</b>
	104,000		2.7%
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(974,900)		-25.6%
			0.0%
<b>Budget Grand Total</b>	<b>\$ 3,813,000</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, etc. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

**SOUTHERN CALIFORNIA EDISON  
EDUCATION & TRAINING**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
<b>Labor</b>			
Type A - Program Planning/Design/Program Mgmt.	\$ 718,600		18.3%
Type B - Mgmt./Supervisor	347,500		8.9%
Type C - Clerical Support	67,600		1.7%
Subtotal Labor	1,133,700		28.9%
<b>Benefits</b>			
Pensions & Benefits	846,100	48.6% of SCE Labor	21.6%
Payroll Taxes	128,800	7.4% of SCE Labor	3.3%
Subtotal Benefits	974,900		24.9%
<b>Travel/Conference/Training</b>			
Type A - Mileage and Parking	51,800		1.3%
Type B - Other - Meals, lodging, misc. expenses	7,100		0.2%
Type C - Conference/Training Activities	29,600		0.8%
Subtotal Travel costs	88,500		2.3%
<b>Reporting/Tracking/Development - Information Services</b>	18,400		0.5%
<b>Materials &amp; Handling</b>	231,300		5.9%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	50,600		1.3%
Type B - Accounting Support	39,500		1.0%
Type C - Communications/Telecommunications/Automated Systems Support	58,000		1.5%
Type D - Human Resources Support	17,700		0.5%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	11,400		0.3%
Type I - Information Technology	800		0.0%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	178,000		4.5%
<b>Subcontractor Administrative costs (administrative only, report other subcontractor costs in the appropriate category)</b>			
Labor	54,400		1.4%
Benefits	-		0.0%
Overhead	-		0.0%
Travel costs	-		0.0%
Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
Subtotal Subcontractor Administrative costs	54,400		1.4%
Profit	-		0.0%
<b>Total Administrative Costs</b>	<b>2,679,200</b>		<b>68.4%</b>

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Marketing/Advertising/Outreach Costs</b>			
Type A - Brochures/Booklets	177,000		4.5%
Type B - Media Support	70,000		1.8%
Type C - Outreach	27,900		0.7%
Total Marketing/Advertising/Outreach Costs	274,900		7.0%
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>	-		0.0%
Subtotal Financial Incentives	-		0.0%
<b>Itemized installation costs</b>	-		0.0%
Subtotal Installation costs	-		0.0%
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>			
<b>Itemized activity costs</b>			
450 In store visits @ \$231 per visit	104,000		2.7%
4400 visits @ \$162 per visit	712,900		18.2%
150 events @ \$5700 per event	1,016,900		26.0%
Subtotal Activity costs	1,833,800		46.8%
<b>Rebate Processing/Inspection</b>			
Subtotal Rebate Processing/Inspection costs	-		0.0%
<b>Total Direct Implementation costs</b>	1,833,800		46.8%

**SOUTHERN CALIFORNIA EDISON  
EDUCATION & TRAINING, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			
EM&V labor	-		0.0%
Subtotal EM&V Labor	-		0.0%
<b>Benefits</b>			
Pensions & Benefits	-		0.0%
Payroll Taxes	-		0.0%
Subtotal Benefits	-		0.0%
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking	-		0.0%
Type B - Other - Meals, lodging, misc. expenses	-		0.0%
Type C - Conference/Training Activities	-		0.0%
Subtotal Travel Costs	-		0.0%
<b>Reporting costs</b>			
Report 1 (consultant cost)	-		0.0%
Report 2 (consultant cost)	-		0.0%
Subtotal EM&V Reporting Costs	-		0.0%
<b>Materials &amp; Handling</b>	-		0.0%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	-		0.0%
Type B - Accounting Support	-		0.0%
Type C - Communications/Telecommunications/Automated Systems Support	-		0.0%
Type D - Human Resources Support	-		0.0%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	-		0.0%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	104,000		2.7%

**SOUTHERN CALIFORNIA EDISON  
EDUCATION & TRAINING, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
<b>Itemized, may include:</b>			
<b>Financing Costs</b>	-		0.0%
<b>Bonding Costs</b>	-		0.0%
<b>Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)</b>	(974,900)		-24.9%
<b>Budget Grand Total</b>	\$ 3,917,000		100.0%

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, and EMV Manual. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.



# Codes and Standards Advocacy Implementation Plan

## 1. Title of Individual Program

Codes and Standards Advocacy

## 2. Plans to Implement this Decision's Changes to Original Proposals

### 2.1 Program Summary

The Statewide Codes and Standards Advocacy Program (Codes and Standards) advocates upgrades and enhancements in energy efficiency standards and codes, thereby capturing the benefits for society from California's diverse energy efficiency efforts. Codes and Standards Enhancement (CASE) studies for energy efficiency improvements will be performed for promising design practices and technologies and will be presented to standards and code-setting bodies. Codes and Standards activities create synergies with other programs, such as Emerging Technologies, energy efficiency equipment rebates, and energy audits, through the advocacy of specific energy efficiency measures. 2002 Codes and Standards efforts are conducted within long-term code upgrade cycles; for example, building code cycles that are typically three years in California.

### 2.2 Implementation Plans

Energy efficiency code and standards advocacy activities will include the following efforts with respect to Title 24 (residential and non-residential building standards) and Title 20 (appliance standards).

- Pacific Gas & Electric (PG&E), Southern California Edison (SCE), San Diego Gas & Electric (SDG&E), and Southern California Gas (SoCalGas) will consider and coordinate Codes And Standards Enhancement (CASE) initiatives on various cost effective building and appliance energy efficiency measures. Various HVAC efficiency measures such as the performance of HVAC equipment at high ambient temperatures may be included.
- Codes and Standards program staff will participate in California Energy Commission (CEC) standards workshops for the 2005, Title 24 rulemaking. Since the scope of the current rulemaking was established from previous input by the CEC, investor-owned utilities' (IOUs), and others, the majority of work in this area will be to defend and support CASE studies begun previously. Significant support is required to advance these efforts, for example, analytical assistance to address legitimate stakeholder issues and concerns, and other public process needs such as draft language for standards. Additionally, the IOUs will advocate cost effective energy efficiency measures for consumers in cooperation with the CEC.

- Codes and Standards program staff will participate in Title 20 appliance efficiency standards activities. Although specific workshop dates are uncertain, we expect the CEC to conduct workshops for defining the scope of the next rulemaking, and for commencing a new rulemaking. IOU support activities will include preparation in the form of further development of existing CASE studies, development of new CASE studies as appropriate based on consultations with the CEC and other stakeholders, and participation in workshops.
- The IOUs will support the development of a Performance Verification standard within the Title 24 building energy efficiency standards. Activities may include participation in the California Commissioning Collaborative.
- Additional activities may include advocacy in other forums affecting California codes and standards efforts.
- IOU's may support and participate in other energy efficiency standards activities such as those conducted by the Department of Energy, ASHRAE, Cool Roof Rating Council, National Fenestration Rating Council, EPA's Energy Star programs, other California rulemakings, targeted training, or scoping studies addressing retrofit residential and nonresidential building code opportunities.
- Codes and Standards program staffs will meet periodically to coordinate inter-utility activities so that the limited statewide funding is used efficiently.

### **3. Energy Savings and Demand Reductions Targets**

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

### **4. Cost-Effectiveness**

There is no estimate of energy, capacity, therm savings, or cost effectiveness for this information program. Although it is the intention of each energy efficiency program to encourage the efficient utilization of electricity and/or natural gas, the calculations performed for the 2002 program cost-effectiveness utilize energy, capacity, and therm savings estimates for measures and programs for which there is a lower degree of speculation. The lack of energy savings, capacity savings, therm savings, resource benefits, or a TRC ratio for any particular program (i.e., information programs) should not imply that a measure or program does not promote energy efficiency nor should it imply that there is not an impact to the customer's use of electricity or natural gas or a corresponding impact to the electricity or natural gas system. However, pursuant to the Commission's approved Energy Efficiency Policy Manual, this proposal for an information-only program is not reasonably expected to provide an estimate of energy savings.

## 5. Evaluating Program Progress For Information-only Programs

To serve as a metric, each utility will provide summary reports on the status of each CASE study active within the current year. Southern California Edison will report on not fewer than ten CASE studies (new and existing) in 2002.

Reports on presentations to the CEC are available through transcripts of CEC standards workshops, typically posted on the CEC website after public hearings. The transcripts include comments made by stakeholders and advocates.

## 6. Hard-to-Reach Targets

The Codes and Standards program does not have specific goals for the hard-to-reach market segments. In general, Codes and Standards activities support hard-to-reach market segments by advocating cost effective code enhancements that promote energy efficiency for all building types and appliances included in the California standards.

## 7. Budget

<b>Program</b>	<b>2002 Budget</b>
Statewide Codes and Standards Program	<b>\$887,500</b>

Notes:

Program budget does not include EM&V activities funded from the statewide EM&V budget. See, Attachment B for a detailed budget.

## 8. Payment Schedule

The CPUC has adopted this program for the remaining nine months of calendar year 2002 thus the payment of funds to the sponsoring utility will be collected during the second, third and fourth quarter of 2002. This payment schedule is abbreviated from the two-year schedule outlined in CPUC's Energy Efficiency Policy Manual in recognition of the program's limited nine-month implementation period.

## **Attachment A: Measure Forecast Table**

**Not Applicable**

# **Attachment B: Program Budget**

**SOUTHERN CALIFORNIA EDISON  
CODES AND STANDARDS**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	38,600		4.3%
Benefits	21,700		2.4%
Travel/Conference/Training	700		0.1%
Reporting/Tracking/Development - Information Services	-		0.0%
Materials & Handling	38,300		4.3%
Overhead and General and Administrative costs	21,100		2.4%
Subcontractor Administrative costs	-		0.0%
<b>Total Administrative Costs</b>	<b>120,400</b>		<b>13.6%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>-</b>		<b>0.0%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	-		0.0%
Installation costs	-		0.0%
Activity costs	788,800		88.9%
Rebate Processing/Inspection	-		0.0%
<b>Total Direct Implementation costs</b>	<b>788,800</b>		<b>88.9%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>21,000</b>		<b>2.4%</b>
	<b>21,000</b>		<b>2.4%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(42,700)		-4.8%
			0.0%
<b>Budget Grand Total</b>	<b>887,500</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, etc. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

**SOUTHERN CALIFORNIA EDISON  
CODES AND STANDARDS**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
<b>Labor</b>			
Type A - Program Planning/Design/Program Mgmt.	\$ 38,600		4.3%
Type B - Mgmt./Supervisor	-		0.0%
Type C - Clerical Support	-		0.0%
Subtotal Labor	38,600		4.3%
<b>Benefits</b>			
Pensions & Benefits	18,800	48.6% of SCE Labor	2.1%
Payroll Taxes	2,900	7.4% of SCE Labor	0.3%
Subtotal Benefits	21,700		2.4%
<b>Travel/Conference/Training</b>			
Type A - Mileage and Parking	300		0.0%
Type B - Other - Meals, lodging, misc. expenses	400		0.0%
Type C - Conference/Training Activities	-		0.0%
Subtotal Travel costs	700		0.1%
<b>Reporting/Tracking/Development - Information Services</b>	-		0.0%
<b>Materials &amp; Handling</b>	38,300		4.3%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	6,700		0.8%
Type B - Accounting Support	5,000		0.6%
Type C - Communications/Telecommunications/Automated Systems Support	7,500		0.8%
Type D - Human Resources Support	1,900		0.2%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	-		0.0%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	21,100		2.4%
<b>Subcontractor Administrative costs (administrative only, report other subcontractor costs in the appropriate category)</b>			
Labor			0.0%
Benefits			0.0%
Overhead			0.0%
Travel costs			0.0%
Reporting costs			0.0%
Materials & Handling			0.0%
Overhead and General and Administrative costs			0.0%
Subtotal Subcontractor Administrative costs	-		0.0%
Profit			0.0%
<b>Total Administrative Costs</b>	<b>120,400</b>		<b>13.6%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
Type A - Brochures/Booklets	-		0.0%
Type B - Media Support	-		0.0%
Type C - Outreach	-		0.0%
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>-</b>		<b>0.0%</b>

**SOUTHERN CALIFORNIA EDISON  
CODES AND STANDARDS, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>			
Subtotal Financial Incentives			0.0%
<b>Itemized installation costs</b>			
Subtotal Installation costs			0.0%
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>			
<b>Itemized activity costs</b>			
CASE Studies (10 @ \$70,000 each)	700,000		78.9%
Codes and Standards Advocacy	88,800		10.0%
Subtotal Activity costs	788,800		88.9%
<b>Rebate Processing/Inspection</b>			
Subtotal Rebate Processing/Inspection costs			0.0%
<b>Total Direct Implementation costs</b>	<b>788,800</b>		<b>88.9%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			0.0%
EM&V labor			0.0%
Subtotal EM&V Labor	-		0.0%
<b>Benefits</b>			
Pensions & Benefits			0.0%
Payroll Taxes			0.0%
Subtotal Benefits	-		0.0%
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking			0.0%
Type B - Other - Meals, lodging, misc. expenses			0.0%
Type C - Conference/Training Activities			0.0%
Subtotal Travel Costs	-		0.0%
<b>Reporting costs</b>			
Report 1 (consultant cost)			0.0%
Report 2 (consultant cost)			0.0%
Subtotal EM&V Reporting Costs	-		0.0%
<b>Materials &amp; Handling</b>			0.0%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support			0.0%
Type B - Accounting Support			0.0%
Type C - Communications/Telecommunications/Automated Systems Support			0.0%
Type D - Human Resources Support			0.0%
Type E - Facilities Support			0.0%
Type F - Supervision			0.0%
Type G - Corporate Services			0.0%
Type H - Transportation Services, Shop Services			0.0%
Type I - Information Technology			0.0%
Type J - Procurement and Material Management			0.0%
Subtotal Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>21,000</b>		<b>2.4%</b>



**SOUTHERN CALIFORNIA EDISON  
CODES AND STANDARDS, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
<b>Itemized, may include:</b>			
<b>Financing Costs</b>	-		0.0%
<b>Bonding Costs</b>	-		0.0%
<b>Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)</b>	(42,700)		-4.8%
<b>Budget Grand Total</b>	887,500		100.0%

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, and the Standard Practice Manual, Reporting Requirements Manual. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

# Upstream Residential Lighting Implementation Plan

## 1. Title of Individual Program

Upstream Residential Lighting

## 2. Plans to Implement this Decision's Changes to Original Proposals

### 2.1 Program Summary

Upstream Residential Lighting is a statewide program coordinated among the electric investor-owned utilities (IOUs). This program will also be coordinated with the Crosscutting Marketing and Outreach program. This type of collaboration has tremendous potential for impacting the marketplace. With years of experience marketing energy efficiency in the state, the IOUs are trusted by consumers as the source for accurate, nonbiased information on energy efficiency. The IOUs established working relationships with retailers and manufacturers that allow for effective and strategic delivery of program objectives. The retailers know that accountability exists with the IOUs.

#### Program Description

This statewide program will collaborate with interested multi-location retailers and manufacturers to offer point-of-sale (POS) discounts for Energy Star<sup>®</sup> lighting products. Customers will receive a \$2 per lamp discount by purchasing compact fluorescent lamps (CFLs) at participating retailers. Customers will receive a \$10 per fixture discount by purchasing Energy Star<sup>®</sup> hard-wired indoor, outdoor or torchiere lighting. A \$20 incentive will be available for Energy Star<sup>®</sup> ceiling fans with light kits. The retailers will be reimbursed for the discounts provided to consumers during the promotion period by providing the sales information for the promotion period to the IOUs. For retailers unable to comply with sales data requirements, the IOUs will work with manufacturers that the retailers select. In addition, manufacturers will also be allocated incentive funds directly from the IOUs and work with their retailers to administer rebates to customers in the traditional upstream approach. Manufacturers shipping to retailers who are participating in the statewide program will not be eligible for incentive payments on the same product for which the retailer receives incentive payments, i.e. manufacturer shipments to retailer A, B, C, X and Y are not eligible because retailers A, B, C, X and Y are participating retailers. Independent regional retailers will be included on a case-by-case basis as funds allow.

The 2002 program will build upon 2001 success by collaboration with multi-location retailers desiring to offer the instant discount such as Costco, Home Depot, Lowe's, Sam's Club, Wal-Mart and other interested chain or independent retailers. Outreach to grocery and drug stores either directly or through manufacturers will have specific focus to ensure meeting the hard-to-reach goals. Coordinated timing with the respective retailers, IOU Web sites, statewide advertising and retailer promotion will be attractive to the consumers.

## Marketing

The IOUs will ensure that appropriate agreements are in place that specifies terms and conditions for collaboration and promotions. Timing will be agreed to with retailers, manufacturers and the Crosscutting Marketing and Outreach Program. Coordination with the Environmental Protection Agency's (EPA) fall season "Change a Light" promotional activities are anticipated as well.

## Outreach

The IOUs will have accurate information on their websites, phone centers and may generate bill inserts as appropriate prior to the promotion period. The Crosscutting Marketing and Outreach will coordinate any radio or print advertising to support product promotion. Lastly retailers' advertising and promotions enforce the messages.

## Tracking

As the proposed budgets are significantly lower than the combined budgets for 2001, the IOUs will provide program end accomplishments as the promotion is not expected to last beyond three months and will likely be expended within a two-month period beginning in September 2002. The portion of funds to promote Energy Star<sup>®</sup> ceiling fans may begin in the spring along with cooling measures from other programs and will be reported in the appropriate monthly reports.

### 3. Revised Energy and Peak Demand Savings Targets

Measure	Unit Defined	Forecast Units	Total Net kWh	Net kWh per unit	Total Net kW	Net kW per unit
Screw-in CFL 15 Watt	Unit	0	0	26	0	0.00
Screw-in CFL 25 Watt	Unit	161,650	8,276,480	51	1,293	0.01
Screw-in CFL 30 Watt	Unit	50,000	3,560,000	71	560	0.01
Indoor Fixtures	Unit	5,145	366,324	71	58	0.01
Retail - Torchiere Floor Lamps	Unit	43,950	9,704,160	221	0	0.00
Outdoor Fixtures Flood 13 Watt	Unit	23,130	2,035,440	88	0	0.00
Outdoor Fixtures Flood 27 Watt	Unit	6,420	1,119,648	174	0	0.00
Energy Star Ceiling Fan w/ CFL	Unit	3,525	564,000	160	39	0.01
<b>Total</b>			<b>25,626,052</b>		<b>1,950</b>	

NOTE: Total net energy savings may differ from the energy savings targets provided in Decision 02-03-056.

**4. Cost-Effectiveness**

	<b>Program Benefits</b>	<b>Program Costs</b>	<b>Net Benefits</b>	<b>Benefit/Cost Ratio</b>
<b>Total Resource Cost Test</b>	\$14,062,000	\$3,365,176	\$10,696,824	4.18
<b>Participant Cost Test</b>	\$15,342,250	2,506,000	12,836,250	6.12

**5. Evaluating Program Progress For Information-only Programs**

Section is not applicable to this non-information program.

**6. Hard-to-Reach Targets**

The IOUs are challenged with ensuring that at least 15% of program incentive budgets are provided via retailers that are outside the urban center areas. The IOUs will provide data, either sales data from the retailers or shipment data from the manufacturers to the retailers. The data will include the store address and zip code as evidence of meeting the hard-to-reach goal. The units sold by the retailers or shipped by the manufacturers times the incentive amount paid will give the achieved budget amount that can be compared to the targeted hard-to-reach dollar amount.

Similarly, the IOUs are challenged with ensuring that at least 10% of program incentive budgets are via the grocery and drug stores. The IOUs will provide sales data from retailers or shipment data from manufacturers of units provided via food or drug retailers. The retailer, the address and zip code of the store and the units distributed through the stores times the incentive amount paid per unit will give the achieved budget amount. This can be compared to the targeted grocery and drug store dollar amount for each IOU. Specific opportunities to impact a community within each of the IOUs' service areas will be pursued by each respective IOU. Opportunities to collaborate will be explored and implemented as funds allow.

**7. Budget**

<b>Program</b>	<b>2002 Budget</b>
Upstream Residential Lighting Program	<b>1,999,500</b>

Notes:

Program budget does not include EM&V activities funded from the statewide EM&V budget. See, Attachment B for a detailed budget.

## **8. Payment Schedule**

The Commission has adopted this program for the remaining nine months of calendar year 2002, thus the payment of funds to the sponsoring utility will be collected during the second, third and fourth quarter of 2002. This payment schedule is abbreviated from the two-year schedule outlined in the Commission's Energy Efficiency Policy Manual in recognition of the program's limited nine-month implementation period.

# Attachment A: Measure Forecast Table

<b>Measure</b>	<b>Unit Defined</b>	<b>Forecast Units</b>	<b>Rebate per unit</b>	<b>Total Rebate</b>
Screw-in CFL 15 Watt	Unit	0	\$2	\$0
Screw-in CFL 25 Watt	Unit	161,650	\$2	\$323,300
Screw-in CFL 30 Watt	Unit	50,000	\$2	\$100,000
Indoor Fixtures	Unit	5,145	\$10	\$51,450
Retail - Torchiere Floor Lamps	Unit	43,950	\$10	\$439,500
Outdoor Fixtures Flood 13 Watt	Unit	23,130	\$10	\$231,300
Outdoor Fixtures Flood 27 Watt	Unit	6,420	\$10	\$64,200
Energy Star Ceiling Fan w/ CFL	Unit	3,525	\$20	\$70,500
<b>Total</b>				<b>\$1,280,250</b>

# **Attachment B: Program Budget**



**SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL UPSTREAM LIGHTING**

**Program Budget Summary**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
Labor	\$ 106,800		5.3%
Benefits	59,800		3.0%
Travel/Conference/Training	3,400		0.2%
Reporting/Tracking/Development - Information Services	-		0.0%
Materials & Handling	16,700		0.8%
Overhead and General and Administrative costs	101,700		5.1%
Subcontractor Administrative costs	-		0.0%
<b>Total Administrative Costs</b>	<b>288,400</b>		<b>14.4%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>261,400</b>		<b>13.1%</b>
<b>Direct Implementation Costs</b>			
Financial Incentives	1,280,000		64.0%
Installation costs	-		0.0%
Activity costs	197,500		9.9%
Rebate Processing/Inspection	32,000		1.6%
<b>Total Direct Implementation costs</b>	<b>1,509,500</b>		<b>75.5%</b>
<b>Evaluation, Measurement and Verification Costs</b>			
Labor	-		0.0%
Benefits	-		0.0%
Travel/Conference/Training costs	-		0.0%
EM&V Reporting costs	-		0.0%
Materials & Handling	-		0.0%
Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	<b>140,000</b>		<b>7.0%</b>
<b>Other Costs</b>			
Financing Costs	-		0.0%
Bonding Costs	-		0.0%
Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)	(199,800)		-10.0%
	-		0.0%
<b>Budget Grand Total</b>	<b>\$ 1,999,500</b>		<b>100.0%</b>

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, etc. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

**SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL UPSTREAM LIGHTING**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Administrative Costs</b>			
<b>Labor</b>			
Type A - Program Planning/Design/Program Mgmt.	\$ 106,800		5.3%
Type B - Mgmt./Supervisor	-		0.0%
Type C - Clerical Support	-		0.0%
Subtotal Labor	106,800		5.3%
<b>Benefits</b>			
Pensions & Benefits	51,900	48.6% of SCE Labor	2.6%
Payroll Taxes	7,900	7.4% of SCE Labor	0.4%
Subtotal Benefits	59,800		3.0%
<b>Travel/Conference/Training</b>			
Type A - Mileage and Parking	900		0.0%
Type B - Other - Meals, lodging, misc. expenses	-		0.0%
Type C - Conference/Training Activities	2,500		0.1%
Subtotal Travel costs	3,400		0.2%
<b>Reporting/Tracking/Development - Information Services</b>	-		0.0%
<b>Materials &amp; Handling</b>	16,700		0.8%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support	31,800		1.6%
Type B - Accounting Support	24,000		1.2%
Type C - Communications/Telecommunications/Automated Systems Support	35,600		1.8%
Type D - Human Resources Support	9,300		0.5%
Type E - Facilities Support	-		0.0%
Type F - Supervision	-		0.0%
Type G - Corporate Services	-		0.0%
Type H - Transportation Services, Shop Services	-		0.0%
Type I - Information Technology	1,000		0.1%
Type J - Procurement and Material Management	-		0.0%
Subtotal Overhead and General and Administrative costs	101,700		5.1%
<b>Subcontractor Administrative costs (administrative only, report other subcontractor costs in the appropriate category)</b>			
Labor			0.0%
Benefits			0.0%
Overhead			0.0%
Travel costs			0.0%
Reporting costs			0.0%
Materials & Handling			0.0%
Overhead and General and Administrative costs			0.0%
Subtotal Subcontractor Administrative costs	-		0.0%
Profit			
<b>Total Administrative Costs</b>	<b>288,400</b>		<b>14.4%</b>
<b>Marketing/Advertising/Outreach Costs</b>			
Type A - Brochures/Booklets	61,400		3.1%
Type B - Media Support	200,000		10.0%
Type C - Outreach	-		0.0%
<b>Total Marketing/Advertising/Outreach Costs</b>	<b>261,400</b>		<b>13.1%</b>

**SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL UPSTREAM LIGHTING, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Direct Implementation Costs</b>			
<b>Itemized financial incentives</b>			
See Table A - Measure Forecast Table	1,280,000		64.0%
Subtotal Financial Incentives	1,280,000		64.0%
<b>Itemized installation costs</b>			0.0%
Subtotal Installation costs	-		0.0%
<b>Itemized hardware/materials costs (primarily for direct install and information/education programs)</b>			
<b>Itemized activity costs</b>			
	59,250		3.0%
Subtotal Activity costs	59,250		3.0%
<b>Rebate Processing/Inspection</b>			
Retailer Invoice Processing	98,750		
Energy Efficiency Call Center Support	32,000		1.6%
Subtotal Rebate Processing/Inspection costs	130,750		6.5%
<b>Total Direct Implementation costs</b>	1,470,000		73.5%
<b>Evaluation, Measurement and Verification Costs</b>			
<b>Labor</b>			
EM&V labor			0.0%
Subtotal EM&V Labor	-		0.0%
<b>Benefits</b>			
Pensions & Benefits			0.0%
Payroll Taxes			0.0%
Subtotal Benefits	-		0.0%
<b>Travel/Conference/Training costs</b>			
Type A - Mileage and Parking			0.0%
Type B - Other - Meals, lodging, misc. expenses			0.0%
Type C - Conference/Training Activities			0.0%
Subtotal Travel Costs	-		0.0%
<b>Reporting costs</b>			
Report 1 (consultant cost)			0.0%
Report 2 (consultant cost)			0.0%
Subtotal EM&V Reporting Costs	-		0.0%
<b>Materials &amp; Handling</b>			0.0%
<b>Overhead and General and Administrative costs</b>			
Type A - Regulatory Support			0.0%
Type B - Accounting Support			0.0%
Type C - Communications/Telecommunications/Automated Systems Support			0.0%
Type D - Human Resources Support			0.0%
Type E - Facilities Support			0.0%
Type F - Supervision			0.0%
Type G - Corporate Services			0.0%
Type H - Transportation Services, Shop Services			0.0%
Type I - Information Technology			0.0%
Type J - Procurement and Material Management			0.0%
Subtotal Overhead and General and Administrative costs	-		0.0%
<b>Total Evaluation, Measurement and Verification Costs</b>	140,000		7.0%

**SOUTHERN CALIFORNIA EDISON  
RESIDENTIAL UPSTREAM LIGHTING, Cont'd**

**Program Budget Detail**

Item	\$	Methodology for Allocation (Footnote if necessary)	Percentage of Total Program Budget
<b>Other Costs</b>			
<b>Itemized, may include:</b>			
<b>Financing Costs</b>	-		0.0%
<b>Bonding Costs</b>	-		0.0%
<b>Less Costs Not Charged to this Program (e.g., benefits recovered by alternate means, as noted above)</b>	(199,800)		-10.0%
<b>Budget Grand Total</b>	\$ 1,999,500		100.0%

notes -

Administrative costs shown above are consistent with the cost categories defined by the EE Policy Manual. However, these costs categories are not intended to be consistent with other CPUC manuals such as the Standard Practice Manual, Reporting Requirements Manual, and the EMV Manual. Administrative costs related to Marketing, Implementation, and EMV costs are categorized under Administrative Cost category.

## CERTIFICATE OF SERVICE

I hereby certify that, pursuant to the Commission's Rules of Practice and Procedure, I have this day served a true copy of SOUTHERN CALIFORNIA EDISON COMPANY'S 2002 STATEWIDE PROGRAM IMPLEMENTATION PLANS on all parties identified on the attached service list. Service was effected by one or more means as indicated below:

- Placing the copies in properly addressed sealed envelopes and depositing such envelopes in the United States mail with first-class postage prepaid (Via First Class Mail);
- Placing the copies in sealed envelopes and causing such envelopes to be delivered by hand to the offices of each addressee (Via Courier);
- Transmitting the copies via facsimile, modem, or other electronic means (Via Electronic Means).

Executed this 20th day of May, 2002, at Rosemead, California.

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Susan L. Quon  
Project Analyst  
SOUTHERN CALIFORNIA EDISON COMPANY

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