

Coordination Between
Low Income Energy Efficiency (LIEE)
and
Energy Efficiency (EE) Programs

Southern California Edison
July 1, 2010

The Commission in Decision (D.) 09-09-047¹ directed the utilities to provide a report to Energy Division detailing coordination efforts between energy efficiency and LIEE programs. In accordance with the decision, Southern California Edison Company (SCE) submits its July 1, 2010 report on this subject.

Introduction

SCE has developed an internal integration team consisting of staff from Energy Efficiency (EE), Demand Response (DR), Distributed Generation (DG), and Low Income Energy Efficiency (LIEE), Marketing and Delivery channels such as Service and Sales (account reps.) and Third Party / Government Partnerships. SCE's low income programs integrate service delivery with the California Alternate Rates for Energy (CARE), SCE's Energy Assistance Fund (EAF), California Solar Initiative, and Medical Baseline programs, in addition to the EE programs, that are the topic of this report. SCE continues to work with the other IOUs on the statewide integration team to leverage ideas and opportunities that have been identified internally.²

In the context of LIEE programs, the Commission defined integration as follows:³

Integration constitutes an organization's internal efforts among various departments and programs to identify, develop, and enact cooperative relationships that increase the effectiveness of customer demand side management programs and resources. Integration should result in more economic efficiency and energy savings than would have occurred in the absence of integration efforts.

¹ *Decision Approving 2010 to 2012 Energy Efficiency Portfolios and Budgets*, dated September 24, 2009, pages 305-307.

² The statewide integrated DSM activities are described in the Program Implementation Plan that was attached to SCE Advice 2426-E-B. The Commission approved Advice 2426-E-B with an effective date of March 12, 2010.

³ D.08-11-031, *Decision on Large Investor-Owned Utilities' 2009-11 Low Income Energy Efficiency (LIEE) and California Alternate Rates for Energy (CARE) Applications*, page 116, dated November 6, 2008.

The Commission further describes interdepartmental coordination as one of four goals for a successful integration effort.⁴ SCE describes below the EE programs that coordinate with SCE's LIEE program.

Comprehensive Manufactured Home Program (CMHP)

This program (formerly known as Comprehensive Mobil Homes) provides energy efficient products and services at no cost to the customer by installing energy efficient products in the mobile home and common areas of the mobile home parks. SCE trained and authorized the existing CMHP contractor to first determine on-site whether customers meet income eligibility criteria for LIEE, and if so, determine all measures that are feasible under the LIEE program. All mobile home customers are eligible to receive measures from CMHP, regardless of whether they are income eligible for LIEE or not, and are enrolled in the CMHP during the same visit. LIEE customers receive all available LIEE measures and CMHP measures that are not included within the LIEE program. The CMHP contractor is an authorized installer for the LIEE program.

California Advanced Home Program (CAHP)

SCE is integrating LIEE into CAHP to target builders involved in construction projects subject to state-mandated housing goals and/or housing elements of local city and county general plans. These projects often have negotiated a "set-aside" of a certain number of units for various income classifications to meet low- and moderate-income housing goals. For those units designated by the builder for low-income occupants, LIEE will pay the full incremental cost of installing higher-efficiency equipment, such as 16.0 SEER HVAC systems and refrigerators. Without the incentive, builders are less inclined to increase the energy efficiency of any new housing units. CAHP will pay the standard calculated incentives for all other measures currently not offered through LIEE that are installed in units designated for low-income occupants. Due to the

⁴ *ID*, page 117.

drastic decrease in the number of planned new housing starts, no new developments have yet been identified with which to launch this integration effort.

Community Language Efficiency Outreach (CLEO)

The CLEO Program is an in-language energy efficiency marketing, outreach, education, and training program targeting Vietnamese, Chinese, Korean, Indian, Hispanic and African-American residential communities. The intent of the program's marketing efforts is to increase energy efficiency awareness and interest in hard-to-reach customer segments, leading to customer participation in residential program seminars, energy efficiency surveys and other energy efficiency programs and practices. SCE's CLEO vendor staff gives in-language presentations to SCE customers at outreach seminars, covering SCE programs that these customers may be able to benefit from. LIEE is included in this presentation. LIEE applications are provided to CLEO vendors to give to customers at the community outreach events. When SCE receives a completed LIEE application, the customer is scheduled for an assessment of eligibility. SCE is also investigating cost effective methods to allow customers to enroll in LIEE Programs while attending CLEO Outreach events.

Partnerships

SCE's partnership agreements with public sector customers are designed to achieve energy efficiency in their facilities and/or communities. Partnerships leverage and align communications to our mutual customers to more effectively reach customers that have not responded to traditional utility marketing approaches. Partnerships funnel customers to our core programs and leverage partners' strengths. Partnerships enable SCE to be creative and responsive by customizing programs as necessary to meet specific customer needs.

SCE's partners include cities, counties and other local government organizations that seek to improve the efficiency of their facilities and provide opportunities for constituents to take action in their own homes and businesses. LIEE and

Partnerships staff work together to identify potential opportunities for integrating LIEE into outreach opportunities during presentations to community leaders and stakeholders. The Partnerships provide a vital channel for jointly promoting LIEE and distinguishing the opportunity for eligible customers to receive energy efficiency improvements in their homes at no or minimal cost.

Energy Upgrade California

The program promotes the “House as a System” approach to energy efficiency and provides incentives toward improvements. The program is expected to roll out in early 3rd quarter 2010. Proposed measures may include: attic insulation, air sealing, duct sealing, combustion safety for the prescriptive path (“prescriptive path” utilizes distinct individual measures that contain required minimum energy efficiency performance values). The performance path (“performance path” delivers comprehensive improvement packages tailored to the needs of each existing home and its owner) will include all the measures proposed in the prescriptive path plus major heating and cooling systems, and hot water systems. Customers can receive incentives up to \$1,000 for the prescriptive path and up to \$3,500 for the performance path. Customers inquiring about Energy Upgrade California will receive information on LIEE. Energy Upgrade California and LIEE program staff are discussing which Energy Upgrade California marketing materials should contain summary information on LIEE and CARE/FERA.

Moderate Income Direct Install (MIDI)

The SCE acknowledges the critical importance of middle income customers and will investigate the potential for expanding the EUC program offering during the 2010-2012 program to include middle income customers (which could include multi-family). The IOUs will look to the LIEE program to serve low income customers and will track the results of the income-qualifying process which could eventually help identify middle income customers.

SCE may also develop a middle income direct install component, as deemed appropriate. The MIDI program would likely offer installation of energy efficient measures at no cost to the customers who are immediately above the LIEE upper income threshold (200% of federal poverty guidelines), but below the upper MIDI threshold that is still being determined. MIDI would be managed under the Energy Upgrade umbrella, and be modeled after LIEE. Historical LIEE data will be tracked to identify customers who completed the LIEE application process and were determined to exceed LIEE income guidelines. These leads will be provided to MIDI as potentially income qualified and willing to participate customers.⁵ If SCE deems it appropriate to develop a MIDI program, the LIEE staff will share program delivery experience with MIDI staff to support the development of effective outreach and marketing plans based on best practices learned in LIEE (and other utilities where applicable) and to ensure that MIDI procedures and systems are developed in a manner that supports cost effective integration between the two programs.

Home Energy Efficiency Rebates (HEER)

In conjunction with an energy efficiency integrated project, SCE has completed implementation of CARE program outreach at six retail stores through which CARE program information is being provided to customers by the sales associates. This integrated project collectively markets and promotes SCE's Residential Lighting, HEER, and Business Consumer Electronics Programs at the six locations. SCE's Home Energy Efficiency Rebates are given to the customer at the point of sale of qualified appliances.

A description of both the CARE and LIEE programs (along with the 800#) was added to the HEER application (available at sce.com) to make customers aware

⁵ Tracking results of the LIEE income-qualifying process in order to identify middle income customers is identified as a strategy in the Program Implementation Plan for the Energy Upgrade California Program (formerly known as Prescriptive Whole House Retrofit Program) that was attached to Advice 2430-E-A. The Commission approved Advice 2430-E-A with an effective date of March 11, 2010.

of the free energy-efficiency services and appliances that are available through LIEE, and the monthly bill discount available with CARE.

Home Energy Efficiency Survey (HEES)

SCE's online survey gives customers helpful energy-saving tips tailored to their home's features and their household energy usage habits based on their responses to 90 questions. Respondents to the HEES must indicate the number of people living in their home, and may choose to indicate in what range their total household income falls. SCE is in the process of determining how many HEES respondents' income levels match with the LIEE income guidelines, and is investigating cost effective methods for marketing LIEE to HEES participants.

Multi-family Affordable Solar Housing (MASH)

SCE staff from LIEE and the MASH program, also managed by SCE, have held over two dozen meetings with representatives from multi-family & Housing & Urban Development (HUD) housing complexes to explain how LIEE and MASH work, and how management of these complexes can leverage relationships with their residents to help them enroll in LIEE and MASH. Residents then apply for LIEE following the normal enrollment procedures utilizing the most efficient channel for them.

Multifamily Energy Efficiency Rebate Program (MFEER)

MFEER offers property owners and managers incentives for installing energy efficient lighting. These incentives are to be used to retrofit existing multifamily properties of two or more units. LIEE outreach is integrated into outreach for MFEER. When multifamily property owners/managers participate in the MFEER Program, they receive a welcome packet, and the CARE/FERA and LIEE programs are described in this packet. CARE/FERA and LIEE programs are also promoted at MFEER outreach events and property owner/manager conferences. Income-eligible residents may enroll in the LIEE program to receive measures not provide by the MFEER program.

WE&T School Programs

As a part of The Go Green Initiative, SCE, for the past two years, associated with East West Bank, businesses, non profits, unified school districts, elected officials and media to integrate program outreach and deliver SCE's programs and resources to help the entire communities save energy, money, and the environment. The CARE/FERA and LIEE programs, along with SCE's Energy Efficiency Programs and rebates, and the LivingWise Program, have been promoted in the communities by canvassing local small businesses and displaying information inside East West bank and affiliated branches. When the LivingWise Program is proposed to schools, school administrators and teachers are educated on the CARE/FERA and LIEE programs to pass the information on to parents. CARE/FERA and LIEE are again promoted to administrators and teachers at post-program participation closing and award ceremonies.

Mobile Energy Unit (MEU)

The MEU is a converted 35-foot Winnebago recreational vehicle equipped with program literature, educational materials and energy efficient technologies and displays. The Second Unit (tent) is an indoor/outdoor display tent which features technologies and showcases SCE's energy efficiency rebate and incentive programs. The CARE/FERA and LIEE programs are on display via large ads on the inner walls of the MEU. LIEE program information is made available with the MEU and its Second Unit (the branded canopy with displays). LIEE is actively promoted at each and every MEU event. MEU availability is targeted to all communities, including economically-disadvantaged communities. SCE is investigating cost effective methods to allow customer to enroll in LIEE Programs while attending MEU Outreach events.

Conclusion

Coordination of the 2010 – 2012 residential energy efficiency programs with LIEE is occurring at various stages from project initiation, consolidation of programs outreach, program delivery, and process enhancement and refinement.

Opportunities are being implemented to ensure customers are presented with their best opportunities to participate in and maximize benefits from SCE's programs. As noted in the introduction, program coordination and integration for low income programs extends beyond energy efficiency to include topics not included in this report such as Demand Response, California Alternate Rates for Energy (CARE), SCE's Energy Assistance Fund (EAF), California Solar Initiative, and Medical Baseline programs.