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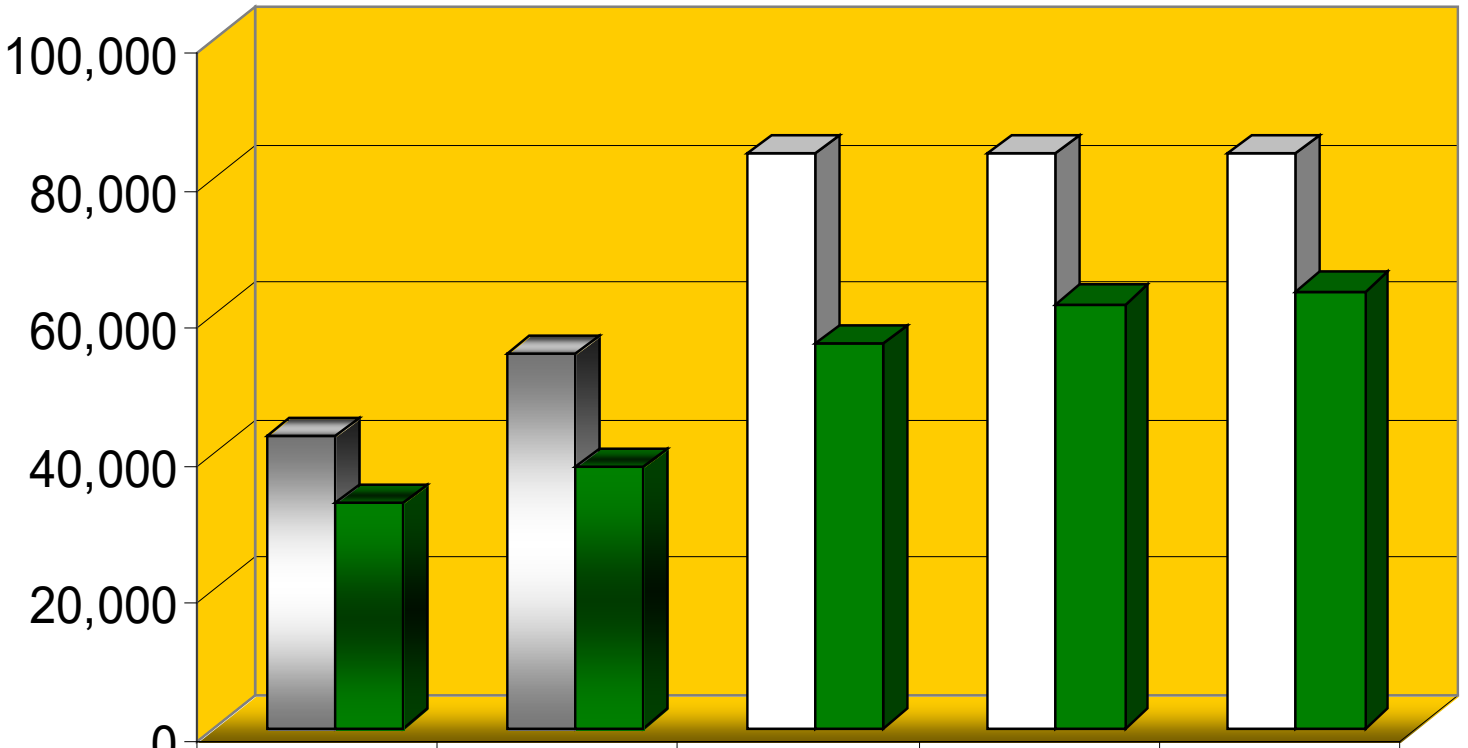
Implementation Update of SCE's 2009-2011 LIEE & CARE Program

DRAFT Presentation to the LIOB
November 9, 2009
San Francisco, CA

LIEE Program Budget and Units 2007 - 2011



	2007	2008	2009	2010	2011
Homes Treated	42,300	54,300	83,400	83,400	83,400
Funding (,000)	$32,580	$37,965	$55,742	$61,561	$63,413

2009 LIEE Activity Through September

Measures	
CFLs	87,072
Torchieres	826
Exterior CFL Fixtures	407
Refrigerators	12,877
Evaporative Coolers	6,100
Central Air Conditioners	1,390
Ducts Sealed	1,236
Pool Pumps	828
Room Air Conditioners	776
Expenditures	$30.8M
Homes Treated	39,572
Homes Goal	83,445

- 18 Assessment Workshops
  - 289 New Assessors in 2009
- 9 new E & A agencies
- WNA Efforts
  - Perris, Hesperia, Palm Springs, Moreno Valley, Redlands, Ridgecrest, Westminster
- Aggressive marketing campaign
  - Bill Onsert / Direct Mail/Outbound Calling
- Outbound call Pilot
  - Incomplete leads
- Direct Mail Campaigns
  - 100,000 CARE customers per month
- Univision 'A Su Lado"
- Self-Certification Project

October 2009 Snapshot

- 47,864 Homes Treated Year-to-Date
  - Aug. 5,700 homes treated
  - Sept. 7,320 homes treated
  - Oct. 8,292 homes treat (thru Oct. 23rd)
- 11,340 Homes In Scheduling Queue
- Leads Generated
  - Aug. 12,400
  - Sept. 20,000
  - Oct. 10,440 (thru Oct. 23rd)

Marketing and Outreach Highlights

Month	Forecast	Actual
August	8,601	12,352
September	17,350	20,773
October	18,450	10,440*
November	19,175	
December	18,525	

* As of 10/22/09

Aggressive Marketing and Outreach Campaign Launched in Late August

- ✓ Targeted Direct Mailers with Press Release
  - ✓ 11,000 Leads since August
- ✓ Outbound Calling Pilot
  - ✓ Over 3,000 leads created
- ✓ EMA Contractor Outreach
  - ✓ Over 5,000 leads generated
- ✓ Riverside/Jurupa School District
  - ✓ Approximately 20,000 EMA Flyers were inserted in Teacher/Student mail-boxes
- ✓ Self-Certification
  - ✓ 10,000 customers targeted

Whole Neighborhood Approach

- Tulare & Porterville Effort – targeted 3,200 customers
  - Combined response rate of approximately 9%
- Cool Center / EMA Joint Partnership
  - Targeted over 3,000 customers to attend Cool Center facility located within Community Action Partnership of San Bernardino
  - Press Release sent to encourage customers to visit the Cool Center and enroll in the LIEE Program
  - Effort expanded to four other Cool Center facilities
- City of Redlands Neighborhood Revitalization Program
  - Identified over 320 serviced customers
  - Prepared city letter to launch in early September

Tracking Customer Visits

- The Energy Management Assistance Partnership System (EMAPS) is SCE's database used for the processing, tracking and reporting of customer activity for the EMA program
  - Implements workflow steps that will provide an organized, connected system to ensure that jobs are performed, and information is collected at the right time in the business process
  - Provides SCE and EMA agencies real-time status, so that a customer can be tracked at any point of the process from enrollment, assessment, installation and inspection
  - Ability to immediately verify previous participation / enrollment in progress and allow users to instantly view jobs assigned to their respective agencies
  - Tracks EMA Program customer leads by type, source, and status
  - EMAPS tracks marketing attempts made to customers to participate in the EMA program and the disposition of each customer, including customers targeted as part of a WNA effort

Tracking Customer Visits

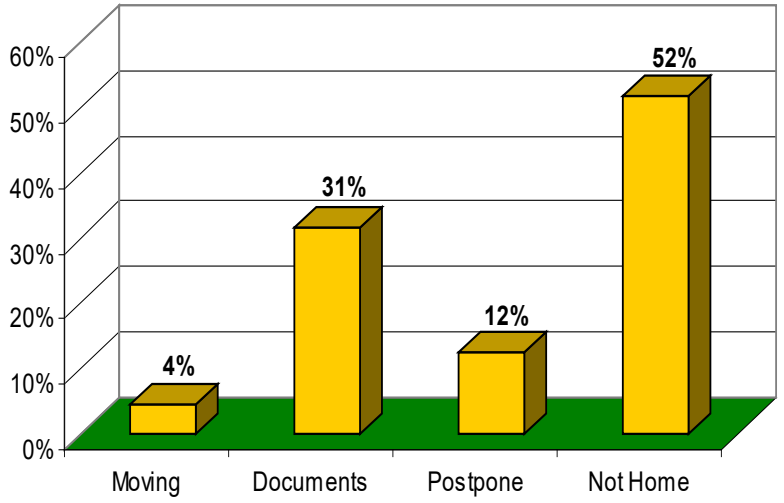
SCE Customer Leads January through September 2009						
Lead Status	**SCE Referral**	**Joint Utility**	**Data Sharing**	**LIHEAP**	**Outreach**	**Total**
In-Progress	3,714	1,017	3,384	-	182	8,297
Enrolled	17,676	15,267	1,939	45	6,339	41,266
Rejected / Refused	4,442	727	1,293	4	799	7,265
Follow-Up Needed	9,728	736	3,508	4	1,174	15,150
Total	35,560	17,747	10,124	53	8,494	71,978

*Leads created Jan through September

Tracking Customer Visits

- 15,000 or 20% of the total customer leads are cancelled for the following reasons:
  - Customer is moving
  - Incomplete or missing documents
  - Landlord/owner did not respond
  - Customer not home
  - Unable to contact
  - Phone disconnected

Follow - Up Needed	
Customer Moving	4%
Incomplete/Missing Documents	31%
Customer/Landlord request to postpone	12%
Unable to Contact/ Not Home	52%



CARE

CARE Penetration		
Participants	Estimated Eligible Participants	Year-to-Date Penetration Rate
1,205,516	1,388,356	87%

- CARE participation has increased by more than 100,000 households since December 31, 2008
- Key Initiatives
  - **34 A Su Lado**—Univision Oct. 19 telecast for IQP
  - **Inaugural SCE Outreach Summit**—Meeeting of internal SCE depts with customer contact to integrate messages & leverage resources. IQP to facilitate bi-annual summits.
  - **Best Buy**– CARE integration with EE pilot
  - **SoundBite** IVR initiative to customers with good payment history in 2008, which defaulted in 2009. 62K customers targeted; 5.3% enrollment rate.
  - **CARE IT enhancements**: Probability Model launched to automatically recert/verify customers likely to continue to be enrolled based on statistical variables. Enhanced data sharing with SoCalGas to include re-certs & verifs.
  - **East/West & Desert Community banks** "Go Green" pilot. Nine "CARE Day" events in local branches; CARE info at 53 branches.
  - **Direct Mail Campaign** to 214K customers with a total household income of $50K or less. Dropped in early October.
  - **Direct Mail Campaign** to 84K customers which failed to recertify within the past year.

Terminations of Residential Service in 2009

2009	Total CARE Customers	Total Residential			CARE			Non-CARE		
		Service Terminated	Reconnected		Service Terminated	Reconnected		Service Terminated	Reconnected	
			Total	%		Total	%		Total	%
January	1,117,274	29,017	22,747	78%	9,240	6,748	78%	19,776	15,999	81%
February	1,124,863	27,273	22,228	82%	9,247	7,028	76%	18,026	15,200	84%
March	1,146,691	32,247	25,781	80%	11,057	8,245	75%	21,190	17,536	83%
April	1,161,348	30,996	25,937	84%	10,936	9,419	86%	20,060	16,518	82%
May	1,165,197	27,391	22,891	84%	9,809	8,350	85%	17,582	14,541	83%
June	1,173,681	29,489	23,856	81%	11,019	9,103	83%	18,470	14,753	80%
July	1,184,652	26,018	21,463	82%	9,452	7,977	84%	16,566	13,486	81%
August	1,196,535	24,546	19,516	80%	8,966	7,269	81%	15,580	12,247	79%