2012-2014 Application
Low Income Assistance Programs

Low Income Oversight Board
June 21, 2011

Proposed Budget and Homes Treated

Homes served will receive more measures with increased kWh and kW savings per treated home

Energy Savings Assistance Program	2009-2011 Cycle To Date (Apr 30, 2011)	2012-2014 Cycle (Proposed)
Budget	$185 Million (adopted)	$185 Million
Homes Treated	250,000 (adopted)	220,000
Avg Total Cost per Home (Incl. Admin. Costs)	$587	$842
Avg Measure Cost per Home	$448	$648
Avg kWh Savings Per Home	309	448
Avg Peak kW Savings Per Home	0.086	0.101

Proposed Budget and Homes Treated (cont)

❖ **How do the Applications support the budget increases in relation to NGAT funding?**

- This question is not applicable to SCE as an electric utility.

❖ **How do the Applications support the budget increases in relation to energy savings targets?**

- Although SCE is not proposing a budget increase, SCE is changing the mix of measures to increase energy savings and cost effectiveness.
- The Commission has set homes treated goals but has not set energy savings targets for the Energy Savings Assistance Program.

❖ **How do the Applications support the goal to improve cost effectiveness?**

- Increases in evaporative cooler and refrigerator installations along with SCE's proposed energy saving power surge protectors all contribute to improving cost-effectiveness.
- SCE also proposes to modify the 3-Measure Rule to increase the number of homes that can receive CFLs.
- SCE is increasing program efficiency through innovations such as Tablet PCs and scheduling software.

New Strategies - CARE

❖ No increase in CARE administration budget

❖ SCE is requesting authorization to allow call center representatives to enroll customers on CARE over the phone using SCE's web-based enrollment

❖ SCE proposes to increase annual post enrollment income verification from 1% to 5% of participating customers

❖ SCE proposes to require customers who do not pass income verification to increase the wait from one-year to two-years before they can re-enroll by self-certifying their income

❖ Data Sharing with water agencies

❖ Other practices (see appendix) that have contributed to SCE's current estimated 98% CARE penetration rate will be maintained or enhanced

New Strategies – Energy Savings Assistance Program – ME&O

Use a mix of delivery channels in order to effectively reach customers

❖ **Direct Mail and Bill Onserts**

- Target CARE customers who have not previously enrolled in the Energy Savings Assistance Program

❖ **Leverage Engage360 / Incorporating new name & logo**

- Local IOU Marketing efforts

❖ **Utilize SCE Messaging Capability to communicate with customers**

- Reminders and energy efficiency information

❖ **High Usage Needs Assessment (HUNA)**

- Customized Marketing material

New Strategies – Energy Savings Assistance Program – ME&O (cont)

Focus on continuous improvement in outreaching targeted groups

❖ **Outreach and Events**

- Community Involvement
- Local Public Affairs / Local Government Partnerships

❖ **CARE Customers Who Have Been Disconnected**

- High Priority multi-touch approach to enroll customers and help them reduce their bills

❖ **Automated Outbound Calling Campaigns**

- Direct Connect / Local Connect

❖ **Expand Outreach to Customers with Special Needs**

- Engage Regional Centers within Service Territory
- Target EAF / Medical-Baseline / Self-identified Customers
- Community events to offer complete solutions for special needs customers

New Strategies – Energy Savings Assistance Program – WE&T

SCE proposes additional training to its current suite of courses

❖ **New Soft Skills Courses**
  - Increase the effectiveness of service providers in providing Energy Savings Assistance Program services
  - Provide skills that can create additional employment opportunities

❖ **Maximize the Effectiveness of Energy Education (3E's)**
  - Training will enhance skills to
    ➢ **E**valuate the needs of low-income customers and tailor the delivery of energy education specifically for each household
    ➢ **E**ducate customers on the benefits of energy conservation
    ➢ **E**ngage customers in the Energy Savings Assistance Program and other services such as SCE's Budget Assistant & Save Power Day Incentives

New Strategies – Energy Savings Assistance Program – Leveraging Resources

❖ **DCSD LIHEAP providers can use SCE's EMAPS program management system to identify previously served customers**

- Streamlined process that assists contractors in identifying previously treated homes
- Continue to allow LIHEAP providers to track and report on LIHEAP treated homes

❖ **Continue providing any/all appliances at no cost to LIHEAP providers**

- SCE pays for purchase and delivery of appliances to LIHEAP provider warehouses while LIHEAP funds pay for the installation
- Extends funding available for both SCE & LIHEAP providers to service more customers

❖ **SCE will continue to contract with CBOs which operate programs targeting low-income, disability, senior, and/or other hard-to reach population segments**

Carbon Monoxide Detectors

❖ **Recent revisions to state law require property owners to install carbon monoxide detectors in dwelling units having a fossil fuel burning heater or appliance, fireplace, or an attached garage**

❖ **As an electric utility, SCE does not provide measures related to burning of fossil fuels, nor does SCE provide combustion appliance testing**

❖ **State law does not require the Energy Savings Assistance Program to include provision of carbon monoxide detectors**

Proposed Joint Studies

❖ Overview of impact evaluation study and requested budget

- Estimate the first year electric and gas savings for the program for each utility, by housing type, measure group and other dimensions (e.g., household size, tenure) to assist in the 2015-17 planning cycle
- This study will occur in 2012-2014, when a full year of post-installation billing data is available for 2010

❖ Overview of energy education study, and requested budget

- Examine current and potential practices related to the educational materials and delivery mechanisms. Evaluate affect on long term behavior and attitude changes in customers. Measure energy/bill savings derived from energy education (attributed savings)

2012-2014 Energy Savings Assistance Program Studies

Study	Total Cost	PG&E 30%	SCE 30%	SoCalGas 25%	SDG&E 15%
Impact Evaluation	$ 600,000	$180,000	$180,000	$150,000	$ 90,000
Energy Education Study	$ 300,000	$ 90,000	$ 90,000	$ 75,000	$ 45,000
Total	$ 900,000	$270,000	$270,000	$225,000	$135,000

Process Evaluation Findings – Property Owner's Waiver

Existing Property Owner's Waiver language and layout will have a new look and feel

❖ **Polled service providers to leverage their program experience and their direct contact with property owners to improve the clarity. Based on feedback, the new form will**
- Clarify existing co-pay language
- Simplify and Clarify the language on T&Cs
- Provide an option for property owners to respond regardless of outcome
- Simplify the process to include authorization for multiple units

❖ **Collaborating with IOUs to develop statewide form**
- Adopt best practices
- Evaluate terms and conditions

Process Evaluation Findings – Property Owner Specific Marketing

New M&O strategies will target property owners

❖ **Property Owner Program Brochure**

- Benefits to Owner / Tenants
- Measure service description
- Enrollment process description
- Available to service providers

❖ **System Generated Letter to Property Owner**

- Increase awareness and legitimize program
- Describe approved services
- Inform tenant is approved for installation services
- Installation process description

Process Evaluation Findings – Cell Phone Protocol

❖ **In January 2010, the Federal Communications Commission (FCC) released a Notice of Proposed Rule Making (NPRM), if the proposal is adopted, it would require prior written 'opt-in' consent from consumers in order to make prerecorded calls to mobile phones**

- **To date, this rule has not been adopted**, and the Energy Savings Assistance Program continues to call customers through automated outbound calling campaigns using phone numbers provided by customers to SCE as a primary contact phone number

❖ **If the proposed rule is implemented, SCE's provider will:**

- Identify and filter out mobile phone numbers from automated outbound calling campaigns

- Develop and deliver an 'opt-in' campaign to obtain customer consent

- Send Free-to-End User (FTEU) text messaging without consumer incurring any cost for the program message

Process Evaluation Findings – Single Intake Form / Proof of Income-

❖ **SCE proposes to use Tablet PCs as a single intake form for enrollment, assessment and income information**

❖ **SCE is working with Southern California Gas Company to create a joint electronic enrollment form**

❖ **Proof of Income**

- Customers who have provided proof of income eligibility to the other IOU's are automatically qualified to participate in SCE's program

- LIEE Statewide Manual – Section 2, item 2.3.2 Referrals:

  ➢ *"Customers that have provided proof of income qualification or deemed categorically eligible by one IOU, shall be considered eligible by all other IOU's serving this customer"*

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Process Evaluation Findings –
Dual electronic enrollment and assessment

❖ **Tablet PCs allow "real time" validation of data entry during customer assessment and enrollment**

❖ **Tablet PCs produce efficiencies in enrollment and reporting**

- Tablet PC removes the need to capture common data on two separate forms and re-enter the data on SCE's EMAPS system

  ➢ Eliminates duplicate efforts

  ➢ Reduces time to enroll customers

  ➢ No confidential documents are taken from customers

  ➢ Information is uploaded directly to SCE's database

❖ **SCE is working with Southern California Gas Company to create a joint electronic enrollment form**

Process Evaluation Findings – Scheduling Inspections and IT Upgrades

❖ **SCE's inspections are performed independently to ensure installations are done properly**

❖ **Efficient deployment of inspectors may result in delays but SCE strives to schedule inspections as soon as is feasible following measure installation**

❖ **SCE is expanding EMAPS capability to include scheduling software to optimize contractor routing, increase efficiency**

- Eliminate manually grouping customer appointments by geographic area, and assigning clusters of addresses to crew members
- Currently, different tools are used for scheduling, such as on-line calendars, spreadsheets and maps
- The software will produce the most efficient overall route available to decrease windshield time, operating costs for fuel, and decrease the program's carbon footprint
- Enable field crews to receive and close out new work orders through their smartphones, producing faster response times and less phone calls, paperwork and overhead costs