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**Local Government Guide 5:**

*Target Low-Income and Senior Populations for Energy Conservation*

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***Highlighted Local Governments***

- City of Colton
- City of Pasadena
- City of Poway
- City of Sacramento
- City of Santa Clara
- San Bernardino County

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***The CPUC's utility rate hikes in March 2001, the largest in the State's history, increased energy bills up to 46 percent.***

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***Summary***

While California's energy crisis in 2001 affected all State residents, low-income and senior populations were especially hard hit. The California Public Utilities Commission's (CPUC) utility rate hikes in March 2001 put an excessive strain on low-income residents' budgets. The rate hike, the largest in the State's history, increased energy bills as much as 42 percent for some Southern California Edison (SCE) customers and 46 percent for some Pacific Gas & Electric (PG&E) customers.<sup>1</sup> In addition, a large number of low-income residents were found to live in warmer-climate regions where use of expensive air-cooling appliances was higher. According to the Public Policy Institute of California, the poverty rate was 22 percent in the San Joaquin Valley, 17 percent in Los Angeles County, 14 percent in the Sacramento area and 18 percent in San Bernardino.<sup>2</sup> Although programs such as California Alternative Rates for Energy (CARE) and California Low-Income Home Energy Assistance Program (CA-LIHAP) were available to help low-income residents manage and mitigate high energy costs, experts estimate that less than one-third of the State's eligible candidates receive such benefits.

California's senior population was affected not only by rising energy rates, but also by rolling blackouts. Statistics from the Federal Emergency Medical Association on heat-related illnesses and deaths across the country illustrate that the elderly are among the most likely

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1. Nancy Vogel and Tim Reiterman, "The California energy crisis: PUC approves largest electricity rate increase in state's history," Los Angeles Times, March 28, 2001, A-1.  
2. Public Policy Institute of California, "Poverty in California," Accessed online at: [www.ppic.org/facts/poverty.oct01.pdf](http://www.ppic.org/facts/poverty.oct01.pdf) on Oct. 2, 2002. PPIC calculations based on U.S. Census Bureau, Current Population Survey, Annual Demographic Files. Racial/ethnic, regional and working poor statistics based on average 1998-2000.

**Consensus-building meetings with businesses, residents, CBOs and others aid in the development of public service programs.**

to experience heat-related problems. In addition, those who rely on electrical medical support systems could have serious complications during a rolling blackout if they are not well prepared.

With the aid of utilities, water agencies, community-based organizations (CBOs) and the State's utility bill programs, many local governments have been able to help residents reduce their energy usage and bills, participate in rebate programs, alleviate the discomfort of hot weather and learn about energy conservation and efficiency. Local governments that are interested in promoting energy conservation and efficiency among low-income and senior communities should consider the strategy steps described in this Best Practice Guide, as well as the specific actions taken by the cities of Colton, Chula Vista, Pasadena, Poway and Sacramento, Santa Clara and San Bernardino County. This Best Practice Guide aims to provide local governments with information on planning, implementing and financing various public services and incentives, descriptions of existing programs and partnerships, contact information for project leads and useful resources.

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### ***Step-by-Step Procedures***

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#### **Step 1: Gather Data**

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✓ **Compile and analyze available information** on energy supply, demand and rates in relevant areas. Include sources, uses and costs of energy using a demographic and/or socioeconomic lens.

The City of Colton's utility company identified customers who met the state's low-income guidelines by enclosing an application for low-income credit for the public benefits charge. Low-income customer information was entered into the utility's billing system, which then produced a report with names, addresses, account numbers and electric costs. Customers with the highest electric bills were offered free energy audits.

The City of Poway discovered that the summers of 1999 and 2000 presented an increase in energy costs and utilities and predicted that the same would be true for the summer of 2001. The San Diego County Building Industry Association report for 1999 stated that the average family paid an average increase of 10 percent on energy bills from May 1999 to October 1999 as compared with the average energy cost of the previous three summers. In the summer of 2000, there was an additional 2 to 5 percent increase in energy costs.

Census 2000 data informed San Bernardino County that approximately 18 percent of the population was below the poverty line and 8.6 percent was over the age of 65.

✓ **Convene consensus-building meetings** with businesses, residents, CBOs, the local utility and local government departments to discuss and develop useful public service programs.

✓ **Build an energy management team.** Appoint a coordinator to lead the team in designing, communicating and implementing projects.

Colton established the Electric Demand Reduction Program to run its energy conservation efforts. Under the program, the city developed the Colton Low Income Assistance Program to target the needs of low-income residents. A Senior Energy Service

Specialist was appointed to monitor those needs, select participants for the program, coordinate home energy audits and track program results. An intern was hired to help conduct the audits.

Pasadena Water and Power (PWP) developed a marketing campaign, “You have the Power to Conserve,” to promote energy conservation. PWP also coordinated with other Pasadena city departments, including Public Works & Transportation, the Police Department and the Health Department, to extend its resources to a greater number of residents.

San Bernardino County assembled an energy crisis team made up of representatives from various county departments, such as Facilities Management, Office of Emergency Services, Special Districts and Architecture and Engineering.

- ✓ **Research state and utility programs** that provide financial assistance, energy audits and installation of energy-efficient products to help low-income residents lower energy costs.

## Step 2: Devise a Plan

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- ✓ **Define the targets, objectives and quantifiable goals** based on a careful review and analysis of the research gathered by the team. Discuss the assumed need, the most cost-effective practices, the staffing requirements and the community response.

Colton Public Utilities’ goals were to: identify which low-income customers had the highest summer energy bills; determine the cause of the high-energy use; and implement cost-effective measures to reduce energy use.

PWP used direct mail, brochures, newsletters and replacement of inefficient equipment to reach, inform and help low-income and senior residents.

Based on the data gathered about energy rate increases, Poway staff and Brookview Senior Housing Partner, an affiliate of the San Diego Interfaith Housing Foundation, planned to design, build and maintain a low-income community for independent senior citizens and their families. The apartment complex, Brookview Village, would combat high energy use with an energy-efficient design and residential equipment.

Sacramento aimed to get residents out of their homes during peak times by extending the hours of public swimming pools during the summer.<sup>3</sup> It anticipated an increase in staffing and pool chemical costs.

San Bernardino County’s objectives were to help residents cut their home energy bills and to make the summer months more tolerable for the low-income, disabled and senior-citizen populations.

- ✓ **Research funding options and set a budget.** Local utilities and state agencies offer a wide range of incentives to underwrite energy conserving behavior and investments.

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3. “Peak” refers to the period when statewide use of electricity is at its highest level producing the greatest potential for forced outages. During the winter, electricity use typically peaked between 4 and 7 p.m. During the summer, electricity use peaked during the mid- to late-afternoon hours. Summer months typically represent the highest statewide use of electricity compared with the rest of the year.

**Colton Public Utilities sought to implement cost-effective measures to reduce energy use.**

**Local utilities and state agencies offer a wide range of incentives to underwrite energy conserving behavior and investments.**

Colton collected funding from its public benefits fund and from the Senate Bill (SB) 5X fund.

PWP collected \$3 million to \$4 million from its public benefits fund and from funds appropriated by SB 5X.

San Bernardino County received a \$1 million grant from the CPUC.

To learn more about utility services and rebate and incentive programs, check with your local municipal utility, or contact:

- Pacific Gas & Electric (PG&E)
- San Diego Gas & Electric (SDG&E)
- Southern California Edison (SCE)
- CEC's Rebate and Demand Reduction Program Database<sup>4</sup>

✓ **Set a timeline.** Plan programs so that they will coincide with peak energy use seasons. Timelines should take into account the local government's budget cycle, as well as utility and government funding rules and deadlines.

✓ **Consider strategies that can make programs more effective or cost-efficient.**

These include requesting technical assistance from or initiating a partnership with other entities (such as businesses, other city departments, utility companies, CBOs or neighboring cities) or conducting a public awareness campaign.

PWP coordinated with the Public Works & Transportation, Police and Health departments in its conservation efforts. PWP also worked with the Metropolitan Water District of Southern California to offer free gardening/landscaping workshops.

San Bernardino County enlisted the help of dozens of senior and CBOs in the area. Through these organizations, such as the Fair Housing Council of Riverside, the county was able to reach and encourage more low-income and senior residents to participate in its "cool center" program, seminars on cutting energy use at home and financial-assistance programs. San Bernardino County provided CBOs not only with brochures and education materials, but also grants to finance workshops and "escape-the-heat" programs.

Since its founding in 1976, the California Conservation Corps (CCC) has partnered with numerous governments and businesses to protect and enhance California's environment and community. The City of Santa Clara supported the CCC/Flex Your Power campaign "Light Brigade" initiative in the summer of 2001.<sup>5</sup> The goal of the "Light Brigade" was to provide an energy audit and then distribute 1.5 million compact fluorescent light (CFL) bulbs to working-class neighborhoods throughout the State.

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4. The database links to a wide range of rebates offered by utilities and state agencies to encourage energy users (residential, business and government) cut electricity use. For more information visit [www.consumerenergycenter.org/rebate/index.php](http://www.consumerenergycenter.org/rebate/index.php).

5. The Flex Your Power campaign, coordinated by the California State and Consumer Services Agency (SCSA) in 2001 and 2002, was the most aggressive, comprehensive and integrated energy conservation and efficiency effort in the history of the United States.

### Step 3: Implement Programs/Operations

The following section lists several successful public service, incentive and technical assistance programs for low-income and senior populations implemented by local governments in California. The specific actions varied according to the city and county's own goals, size and resources, such as budget and staff.

- ✓ **Conduct free energy audits** to help low-income and senior residents determine sources of high energy bills and suggest cost-effective measures to lower bills.

Chula Vista's interns and SDG&E auditors conducted energy audits in 1,500 homes between April and September 2001. The interns and auditors provided residents with free CFLs and information about retrofit rebates.

Colton conducted comprehensive home energy audits for 58 low-income customers with high electric bills (between \$140 to \$290 per month). The auditor evaluated energy using equipment, suggested cost-effective measures, implemented no-cost/low-cost measures (i.e., turned down water heater temperature, replaced air filters), distributed educational energy conservation materials and provided 50 free portable evaporative coolers to replace residents' air conditioners.

San Bernardino County alerted residents about free energy audits from utility companies through direct mailers and public service announcements.

SVP sent energy specialists to residences to analyze the customer's energy use history and to examine all energy consuming devices and appliances. The specialist then recommended ways to save money. Home energy audits included a variety of free products, such as up to four CFL bulbs, a limelite (an energy-efficient night light), a weatherization kit and a programmable thermostat.

- ✓ **Provide energy-saving tips** in the form of telephone hotlines, workshops or seminars.

PWP launched AnswerLine in February 1998, a free telephone hotline to give customers information about conservation programs, rebates and energy and water conservation tips. In 2001, PWP rolled out a website that let customers post questions and request information about conservation and efficiency programs.

Funded by a grant from San Bernardino County, CBOs such as the Fair Housing Councils of Riverside and San Bernardino held weekly classes on efficiency improvements in the home. Led by Ace Hardware, the classes covered topics such as caulking and weather-stripping.

- ✓ **Provide information about financial and technical assistance**, and encourage low-income and senior residents to apply for help.

PWP created water and energy conservation kits that included conservation tips and frequently asked questions. The city also put together and distributed specific brochures designed to help low-income and senior/disabled persons lower their energy bills. The brochures also contained applications for utility assistance programs.

San Bernardino County provided to low-income and senior residents at all its cool centers information about conserving energy, reducing energy bills and applying for financial assistance.

**Energy specialists were sent to residences by SVP to analyze energy use, examine energy-consuming devices and appliances and recommend ways to save money.**

**Rebate and incentive programs for low-income and senior residents provide financial relief for conserving energy.**

- ✓ **Offer new technology free or for lease** to help low-income and senior residents reduce their energy bills and to increase their acceptance of energy-efficient residential products and appliances.

Under Chula Vista's Residential Lighting Retrofit and Audits project, the city provided CFLs to residences and replaced up to eight incandescent bulbs with fluorescent bulbs in more than 1,500 homes by September 2001.

Colton provided 50 low-income households with evaporative coolers to replace air conditioners.

All PWP customers received a coupon with an offer for a free three-pack of CFL bulbs with their bill.

Santa Clara supported the CCC/Flex Your Power "Light Brigade" initiative in the summer of 2001, which provided homes with free CFL bulbs after an energy audit. The goal of the "Light Brigade" goal was to distribute 1.5 million CFL bulbs in working-class neighborhoods throughout the state.

- ✓ **Provide an alternative to home energy use** to encourage conservation by seniors, disabled residents and low-income families.

San Bernardino County retrofitted senior centers, community centers and malls into 12 public cool centers for the summer of 2001. The cool centers offered air conditioning, beverages, a free meal, recreational activities and information about conserving energy and reducing utility bills. With funding from the county, the Fair Housing Council of Riverside established 29 cool centers at community and senior centers.

Sacramento implemented a "Beat the Heat" program between Memorial Day and Labor Day. Four pools extended closing time from 3 p.m. to 5 p.m. and 13 pools stayed open until 7 p.m. Seven community centers remained open until 10 p.m.

- ✓ **Develop rebate and incentive programs** for low-income and senior residents to take energy conservation and efficiency measures. Programs can offer:

- Rebates for washing machines

Many cities such as Poway and Pasadena provided business and residential customers with rebates of \$75 to \$350 for replacing old washing machines with low-energy/low-water use machines. Pasadena also offered residents additional rebates for purchasing and installing ENERGY STAR® washers.

- Rebates for dishwashers

Santa Clara as well as several other cities provided residential customers with rebates of \$50 or more for replacing old dishwashers with ENERGY STAR® low-energy/low-water use machines.

- Rebates for toilets

Poway and PWP provided customers with rebates of \$60 for replacing non-ultra-low-flow (ULF) toilets with water-efficient toilets, which save on average 30 to 50 gallons per day, per toilet.

- Rebates for refrigerators

Many cities such as Chula Vista and Poway provided a \$50 rebate to customers who replaced an old refrigerator with an ENERGY STAR® model. Chula Vista also

provided energy planners valued at \$50 to residents for older refrigerators. Energy planners are plug-in devices that regulate motor operation, reduce motor operating temperature and power consumption. For various 115-volt refrigerators, the planner extends the life of a motor and reduces energy use by 18 to 33 percent.

PWP gave residents a \$25 rebate for recycling an old inefficient refrigerator, and added \$100 to \$220 in rebates based on the purchase price for purchasing models that were ENERGY STAR® approved. If the refrigerators were purchased from a Pasadena retailer, customers received an additional 10 percent rebate. Under the Refrigerator Replacement Program, the utility provided 596 low-income or disabled customers with a free high-efficiency refrigerator.

SVP, in partnership with ARCA (Appliance Recycling Centers of America), paid residents \$75 to let the utility haul away old refrigerators. SVP then provided a \$75 rebate to customers whose new refrigerators complied with federal appliance standards and contained only ozone-friendly HCFS. ENERGY STAR® models received an extra \$50 rebate.

- Rebates for energy-efficient upgrades, new energy-efficient construction and weatherization measures

SVP provided eligible residential customers with a \$175 rebate for purchasing and installing at least 50 square feet of attic insulation materials.

- Rebates for energy conserving behavior

PWP offered energy conservation rebates to residential and commercial customers. Those customers conserving 5 percent compared with their last year's electric bill received a 5 percent discount on their bill and those who conserved 10 percent or more received a 10 percent discount. PWP also developed the Lifeline program, targeting low-income, senior and disabled customers. Customers who qualified received an exemption from paying the user's tax on the utility bill, phone bill, gas and cable bill. Qualifying customers could also receive a 25 percent discount on a portion of their other PWP electric charges, as well as a credit for the temporary public benefit charge and the electric rate surcharge.

- ✓ **Build an energy-efficient space** for senior and/or low-income residents.

Poway, with funding assistance from San Diego County and an agreement with the Interfaith Housing Foundation, built an affordable 100-apartment complex fitted with the latest in energy-efficient equipment for low-income seniors aged 55 and older.

Some of the features of Brookview Village included advanced heating and mounted water heaters; silicon caulking of double-paned windows; "glazing" (tinting) of windows; ENERGY STAR® appliances (washer/dryer, microwave, refrigerator); insulation with a low U-to-R ratio to provide greater resistance to the outside environment; and gas fireplaces.

- The complex also included an energy-efficient community building, insulated from outside weather.
- Rents ranged from \$300 to \$650.
- Groundbreaking began in October 2000; the complex was completed in July 2001. Brookview received 1,000 applicants for the residence, from which more than 100 residents were chosen based on a first-come, first-served basis once they met all eligibility criteria (income, age, rental and credit history).

**SVP provided eligible residential customers with a \$175 rebate for purchasing and installing at least 50 square feet of attic insulation materials.**

**Program success can be evaluated by assessing resource and financial savings, the impact on the local economy, employee response and the public benefit created.**

#### Step 4: Monitor and Measure Results

- ✓ **Gather information on an ongoing basis** to monitor the progress of programs and to make adjustments to maximize results and adapt to changing circumstances. Create a tracking system or use monitoring tools provided by local utilities. Results should be measured against the original budget and goals of the program.
- ✓ **Evaluate the success of programs** by looking at resources saved, money saved, money spent, the impact on the local economy, the employee response and the public benefit created. The following results are estimated savings for 2001 unless otherwise noted.

The City of Colton's Electric Demand Reduction Program helped low-income participants reduce their energy costs by an average of 26 percent. Fifteen percent of customers saved 40 to 65 percent on their energy bill, 27 percent of customers saved 30 to 40 percent and 64 percent of customers saved 20 to 30 percent.

TABLE G5-1. City of Colton Results

Program	Implementation Costs	Annual Energy Savings	Rebates and Grants to Customers	Annual Financial Savings
58 home energy audits	\$5,800 (\$100 per home)	Average 224,640 kWh	\$5,800 (SB 5X)	\$26,956
50 portable "coolers"	\$10,000 (\$200 each)	136kW total demand reduction savings; 75,000 kWh per year	\$10,000 (SB 5X)	\$14,400
<b>Total</b>	<b>\$15,800</b>	<b>299,640 kWh</b>	<b>\$15,800 (SB 5X)</b>	<b>\$41,356</b>

Chula Vista estimated in November 2001 that the city would reduce its total energy consumption in 2001 by more than 10 percent compared with the year before. The city's free energy audit program was a success: 1,500 homes were audited.

In 2001, the City of Pasadena reduced its citywide energy use by 5.84 percent, from 1,229,421 MWh in 2000 to 1,157,607 MWh in 2001. Pasadena Water and Power's (PWP) service, incentive and technical assistance programs save customers an estimated total of 16,695,000 kWh and \$2,173,000 in energy costs annually.

- The city distributed 8,337 CFL packages to residents in the summer of 2001.
- 965 residential customers participated in the Refrigerator Recycling Program.
- 596 low-income or disabled residents participated in the Refrigerator Replacement Program.
- 83,675 rebates totaling \$5,375,930 were distributed to residential and commercial customers who had reduced energy use by 5 or 10 percent in the summer of 2001 compared with the summer of 2000.

- Landscaping workshops, offered under PWP’s Water Program, were held once a week in October 2001, with 20 Pasadena residents attending each class. The workshops will take place again August 2002.

**TABLE G5-2.** City of Pasadena Results

Program	Implementa- tion Costs	Annual Energy Savings to Customers	Rebates and Grants to Customers	Annual Financial Savings to Customers
Residential CFL distribution	\$338,000 (8,337 packs distrib- uted)	3,068,016 kWh	Not available (N/A)	\$412,000
Residential appliance rebate	\$648,000	247,758 kWh	2,818 rebates	\$33,200
Refrigerator recycling	\$118,000	427,012 kWh	965 rebates	\$998,600
Refrigerator replacement	\$359,000	263,730 kWh	596 rebates	\$616,700
<b>Total</b>	<b>\$1,463,000</b>	<b>4,006,516 kWh</b>	<b>Minimum 4,379</b>	<b>Minimum \$2,060,500</b>

**Pasadena Water and Power’s (PWP) service and incentive programs save customers an estimated total of 16,695,000 kWh and \$2,173,000 in energy costs annually.**

Energy consumption in Poway dropped a county high of 27 percent in July 2001. More than 300 customers recycled their refrigerators and received a \$50 rebate. In addition, Brookview Village exceeded Poway’s energy conservation goals by 40 percent, recording an average 14 to 16 percent reduction in energy costs and saving residents money on energy bills. In winter 2001 Brookview Village received an award for energy efficiency at Poway’s Sixth Annual Awards Presentation for Outstanding Achievement in Affordable Housing & Community Development, an event sponsored by the San Diego Housing Federation.

Sacramento’s Department of Parks & Recreation received \$50,000 from the City Council to implement the “Beat the Heat” program. The program was a success: More than 17,000 people visited the swimming pools during the extended summer hours. The city as a whole reduced its energy use by 9 percent, despite having built more than 500,000 square feet of space in 2001. A whopping 72 percent of the savings was attributed to conservation actions and to the city’s voluntary load curtailment.

San Bernardino County anticipated county-wide financial savings of \$2.3 million in 2001 as a result of energy conservation and efficiency programs. Between early August and late October the 12 cool centers averaged 125 visitors a day. The 29 cool centers established by the Fair Housing Council of Riverside had more than 5,000 visitors during that period. The City Council estimated a 21 percent energy reduction during peak time in the Riverside region.

Between July 2001 and April 2002, Silicon Valley Power’s (SVP) customer-focused programs resulted in energy savings of 32,552,580 kWh for the City of Santa Clara. Thousands of rebates were distributed via purchases from the Plug-ins Catalog: Residents received 3,440 rebates for CFL bulbs, lamps and torchieres, 823 for new refrigerators and 747 for recycled refrigerators/freezers. Residents received rebates for 222



**Between July 2001 and April 2002, SVP's technical assistance and incentive programs resulted in energy savings of 32,552,580 kWh for the City of Santa Clara.**

dishwasher installations. For fiscal 2001 (ending June 30, 2002), 447 homes received free energy audits and 3,963 free CFLs were distributed to residents.

**TABLE G5-3.** City of Santa Clara Results

Program	Implementation Costs	Annual Energy Savings to Customers (July 2001-April 2002)	Rebates and Grants to Customers	Annual Financial Savings to Customers (July 2001-April 2002)
Residential in-home audits	Not available (N/A)	2.58 kW; 7,860 kWh/year	None	N/A
Residential retrofit/upgrade rebates (refrigerators, dishwashers, CFL giveaways, attic insulation)	N/A	237.18 kW; 727,175 kWh/year	\$75 for ENERGY STAR® model refrigerator, \$50 for ENERGY STAR® dishwasher, \$175 for 50 sq. ft of insulation	N/A
Plug-ins Catalog	N/A	124.77 kW; 382,559 kWh/year	\$5 for CFLs, \$10 for fixtures and \$15 for torchieres	N/A
Customer Directed Rebate	N/A	826.31 kW; 5,066,906 kWh/year	Varies	N/A
<b>Total (for city, including other programs)</b>	<b>Approx. \$5.5 million</b>	<b>6,648.72 kW; 32,552,580 kWh/year</b>	<b>N/A</b>	<b>N/A</b>

### ***Lessons Learned***

-  Sacramento found that successful programs required voluntary staff participation and public and employee education.
-  Santa Clara learned that it should begin projects at least one year in advance and should expect a long lead-time. Utility customers need time to become acquainted with new energy programs and to become comfortable working with the city.

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## Contacts

Contact information for the local governments discussed in this Best Practice Guide are listed below. See the case study on the local government for additional program information and summaries.

- **City of Colton**

**Contact:** Gerald Katz  
160 S. 10th St., Colton, CA 92324  
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- **City of Pasadena**

**Contact:** John Hoffner, Public Benefit Charge Program Manager  
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- **City of Poway**

**Contact:** Dennis K. Quillen, Assistant Director of Public Works  
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- **City of Sacramento**

**Contact:** Brian Reilly, Senior Engineer  
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- **County of San Bernardino**

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- **City of Santa Clara**

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