



# **PY2010-2012 Community Language Education and Outreach Process Evaluation Report**

**CALMAC Study ID SCE0339.01**

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**Prepared for:  
Southern California Edison**

The Cadmus Group, Inc.

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## Executive Summary

### *Study Goals and Methods*

The Southern California Edison (SCE) Community Language Efficiency Outreach (CLEO) program provides basic energy-efficiency education in various languages. This report describes the results of Cadmus' process evaluation, which focused on the following research areas of the CLEO program during the 2010-2012 program cycle:

- Implementation of 2006-2008 recommendations
- Stakeholder views on program performance
- Program design
- Impact on participant awareness, knowledge, satisfaction, and behavior

To perform our evaluation, we interviewed CLEO program and implementer staff members; reviewed program reports and documents; analyzed participation records; examined U.S. Census data; and conducted an in-language<sup>1</sup> telephone survey with participants.

### *Cadmus Conclusions and Recommendations*

Based on our findings, we provide the following conclusions and recommendations:

**Conclusion 1. Program seminar and booth targets are being met, despite budget cuts.** While the budget cuts have limited the ways in which the implementer, Global Energy Services (GES), can follow up on program activities and expand outreach efforts, GES is still maintaining a successful level of engagement with the communities served.

**Recommendation 1.** Maintain existing relationships and build new ones within the targeted communities; utilize the relationships efficiently to continue meeting program goals.

**Conclusion 2. The Hispanic community was underserved in the 2010-2012 program years.** At the beginning of this program cycle, the Spanish-speaking community represented a large, untapped market for the CLEO program. There were hurdles that initially impeded the outreach effort that began late in the program cycle; however, the staffs of both the CLEO program and GES anticipate that the outreach will result in significant progress over the next program cycle evaluation.

**Recommendation 2.** Maintain a strong focus on outreach to Hispanic communities and establish relationships similar to those in Asian-language communities that have helped CLEO reach non-English speaking communities in past years.

**Conclusion 3. The potential market for CLEO's services is significant (up to 20% of Los Angeles area households), and seminar participants are receptive to basic energy education.** Because approximately one-fifth of the households in SCE territory speak English "less than very well," the in-language services

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<sup>1</sup> Throughout this report, the phrase "in-language" describes services or materials that were translated into the different CLEO supported languages.



appear very important for the area. A majority of survey respondents said they installed energy-efficient equipment after attending the seminar, and a high number attributed their actions to the influence of the seminar. More respondents in the 2010-2012 evaluation than in the previous evaluation reported participating in a SCE program. Thus, it appears that the CLEO program is serving this 20% of SCE customers' needs for education on energy efficiency and motivating them to take action.

**Recommendation 3.** If the budget allows, measure seminar influence by tracking the post-seminar activities of attendees. Consider using customer account numbers to monitor participation in other SCE programs or determining if energy bills have fallen after program participation.

**Conclusion 4. Seminar attendees are highly satisfied with the seminars and are very interested in learning about ways to save energy.** Approximately 90% of survey respondents said they were satisfied with all of the aspects of the seminar mentioned in our survey. The most common reason they gave for attending the seminar was to learn more ways to save energy. Also, we found a high level of recall among respondents regarding the information discussed in the seminar.

**Recommendation 4.** Continue conducting seminar QA/QC in monthly meetings to maintain quality and customer satisfaction.

**Conclusion 5. CLEO program staff responded to the 2006-2008 recommendations appropriately.** Based on our review of the rationale for implementing or not implementing the previous evaluation recommendations, we conclude that the program staff members have acted consistently with the goals of the CLEO program.

**Recommendation 5.** If the goal is to continue providing basic energy-efficiency education to non-English speaking customers, then CLEO should continue along its current trajectory. Program staff should determine if the actions customers take after attending CLEO seminars are satisfactory, and make adjustments to the seminar if more specific follow-up actions are desired.

**Conclusion 6. SCE's in-language support continues beyond CLEO to program websites and phone support.** We found that SCE's website and telephone support services are available in multiple languages, which may be important for CLEO participants who wish to take the next step participating in a program. However, energy-efficiency program application forms are still primarily in English only.

**Recommendation 6.** If CLEO will be continued, then program managers should (1) examine how customers not fluent in English will be able to follow through and participate in SCE programs; (2) determine if the English language program application form presents a barrier and take appropriate actions; (3) consider leading seminar and booth participants through the in-language SCE program websites and application forms (at the end of the seminar or during one-on-one sessions at the booth) to empower customers to look up needed information on their own; and (4) ensure the financial and other non-energy benefits of energy-efficiency upgrades are clearly communicated and emphasized.

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### ***Additional SCE and Energy Division (ED) Insights***

During the draft report review process, SCE and ED discussed the 2010-2012 process evaluation results for CLEO in the context of changes that had already occurred in the 2013-2014 cycle, and provided the following updates and recommendations to Cadmus.

#### *Evolution of CLEO Program Classification*

During the last three program cycles, the CLEO program shifted within the SCE portfolio. In 2006-2008, CLEO was a part of the Education, Training and Outreach Program. In 2010-2012, CLEO was a part of the Home Energy Advisor Program. In 2013-2014, CLEO became a part of the Workforce Education & Training (WE&T) Connections Program.

#### *2013 Green Job Training Pilot*

Since CLEO joined the WE&T Program, the SCE program team and the implementer added a workforce element that focuses on building green-job awareness for customers with limited English proficiency. During the fall of 2013, the CLEO team piloted a multi-week training course for unemployed individuals interested in entry-level green jobs. The training focused on the topics of energy efficiency, distributed generation, demand reduction, demand-side management and green career paths, plus training in software skills.

The vision of this training pilot is to encourage participants to do the following:

1. Seek entry level employment in “green energy” jobs
2. Further their knowledge of green topics by taking classes at community colleges

The training pilot concluded in November, 2013. SCE is waiting for the implementer’s self-assessment report, which will address the pilot’s outcome, best practices, and recommendations for next steps.

**SCE/ED Recommendations.** If the CLEO program team decides to expand this training pilot into 2014, then the next cycle of the measurement and evaluation (M&E) roadmap should include three actions: (1) provide rapid feedback on the results of the pilot program; (2) update the program theory and logic model to encompass the pilot; and (3) conduct an independent process evaluation to assess the effectiveness of this pilot program in the context of short-term and intermediate-term desired program outcomes. The process evaluation should also examine consistency with the overall WE&T program strategy.

In addition to updating the M&E roadmap, the CLEO team should also consider updating the educational content of CLEO to reflect SCE and ED priorities, such as incorporating integrated demand side management concepts.



## Introduction and Evaluation Approach

This report describes the results of Cadmus' process evaluation of the Southern California Edison (SCE) Community Language Efficiency Outreach (CLEO) Program, which targets residential customers who either do not speak English as their first language or who are members of a hard-to-reach ethnic population. CLEO was designed to increase energy-efficiency awareness, knowledge, and actions through offering these in-language services:

- Educational seminars (promoted through radio and newspaper advertisements)
- Booths at community events
- School and community outreach
- Phone consultations through a dedicated hotline
- Program website

Our evaluation focused on the CLEO seminars, as these were the most significant component of the program. The objectives of Cadmus' process evaluation were to document the program's achievements and address these questions:

- Were the recommendations from the 2006-2008 evaluation acted upon? Why or why not?
- How do program staff and implementers view CLEO's performance?
- Does the program's logic model align with its actual design?
- Does CLEO adequately serve those customers for whom English is a second language and those in hard-to-reach ethnic populations?
- How aware and knowledgeable are CLEO seminar participants of the Home Energy-Efficiency Survey (HEES) and other SCE programs?
- To what extent did the CLEO seminars motivate participants to obtain a HEES, participate in a program, or make behavioral changes?
- What barriers did participants encounter when taking energy-efficiency actions?
- Is the in-language support provided through CLEO also present in the programs to which CLEO customers are referred (such as HEES and Energy Upgrade California)?

Our evaluation methods were:

- Interviewing both program implementer staff and SCE program staff members (including new staff from the 2013-2014 program cycle).
- Reviewing program materials, including presentation slides, SCE websites, marketing collateral, and evaluations of CLEO from prior program cycles.
- Analyzing program attendance.

- Surveying 120 seminar attendees by telephone. Because we conducted the evaluation survey in the second half of 2013, we drew our survey sample from CLEO participants who attended seminars in 2012 to maximize respondents’ seminar recall rate.

## CLEO Program Description

CLEO is a non-resource,<sup>2</sup> third-party program that is funded through separate agreements with the Southern California Gas Company (SoCalGas) and SCE. Global Energy Services (GES) implements the program. The program started in the 2004-2005 program cycle and targeted Chinese-speaking communities, as shown in Table 1. In the 2006-2008 cycle, the program expanded to serve Korean- and Vietnamese-speaking customers. In the 2010-2012 cycle, the program was expanded further to address Hispanic and African-American communities.

**Table 1. Expansion of CLEO**

Program Cycle	Chinese	Korean	Vietnamese	Spanish	African-American	Small Commercial (pilot)
2004-2005	✓					
2006-2008	✓	✓	✓			
2010-2012	✓	✓	✓	✓	✓	✓

The expansion of the program to more languages required GES to add full-time and part-time language staff to assist with seminars, booths, marketing, and outreach. These staff members are:

- Two Chinese-language experts
- One Korean-language expert
- One Vietnamese-language expert
- One Spanish-language expert
- Five speakers of the various languages working part-time on booth events

### *In-Language Seminars*

CLEO’s main offering is its interactive in-language seminars, which range in length from 1.5 hours to 2 hours. According to program staff members, these seminars are hosted at locations that customers from the targeted language communities can easily access. Through relationships with churches, senior centers, schools, and community organizations, GES identifies where to hold seminars. It also receives direct requests from community leaders to host events. For example, at a church that was holding an evening fund-raiser, GES conducted a seminar for the event’s donors.

<sup>2</sup> During the 2006-2008 program cycle, there was a brief period when SCE attempted to transition CLEO into a resource program by linking it to HEES; however, this attempt was ended during the same program cycle.



### Seminar Promotion

GES primarily promotes the seminars through in-language radio or newspaper advertising (Figure 1). The community organizations hosting the CLEO seminars also play a role in promoting the event to their constituents.

Figure 1. CLEO Newspaper Advertisement



### Seminar Attendance, Presentation, and Handouts

At the beginning of each seminar, attendees are required to provide a utility bill that shows they are eligible customers of SCE or SoCalGas. Attendees then write down their information on a sign-in sheet and receive a packet of handouts: an informational booklet about saving energy, a seminar exit survey, and a HEES enrollment form.

Once all of the attendees are seated, the seminar host gives a presentation using a standardized deck of slides that have been translated into the appropriate language (Figure 2). The seminar slides cover “energy-efficiency 101” topics, such as the top “energy guzzlers” found in homes, low-cost and no-cost tips to save energy, and information on how to participate in SCE or SoCalGas programs. At the end of the presentation, the host answers questions, often referring the attendees to the booklet provided in the handout packet.

Figure 2. CLEO Seminar



After the presentation and Q&A session, the attendees receive a gift bag (Figure 3) and complete the seminar exit survey. The gift bag contains a lunch coupon, a CFL night-light, a CFL bulb, and HEES sign-up form. The exit survey tracks customer awareness of CLEO, seminar satisfaction, and interest in taking actions to save energy.

Figure 3. CLEO Gift Bag



### Seminar Staff Training

GES staff members reported that they meet once a month to discuss the seminars and to update each other on any program changes. These meetings are a venue for providing quality assurance (QA) and training to the seminar presenters, and are designed to ensure continual improvement.

### Booths at Community Events

To build relationships with the community and to educate attendees at community events, GES sets up booths promoting CLEO at various community events, including Chinese New Year or Harvest Moon festivals. GES will contact or be contacted by community organizations to set up a booth at these events. Figure 4 shows a typical CLEO exhibit booth.



Figure 4. CLEO Booth



The booths are staffed by language experts for the targeted community. They distribute in-language brochures and collateral on SCE programs and the HEES program, answer questions, and give out “goody bags” containing CFL night-lights or CFL bulbs. Before 2012, booth staff also conducted 5-minute HEES surveys.

### ***Small Commercial Pilot***

SCE added a small commercial pilot in the 2010-2012 program cycle targeting business customers whose energy use was less than 199kW. This pilot—which provided services in Spanish, Vietnamese, Chinese, Korean, and Indian languages—was designed to raise customer awareness of and participation in energy-efficiency programs.

In an effort to quantify the savings attributable to CLEO, program staff worked with account representatives of SCE’s Business Customers Division to develop a system that tracked business leads generated through seminar participation. This would ensure that both the CLEO program and the account representative received credit for any ensuing energy savings. However, SCE stopped the pilot because of budget changes and because SCE staff determined there was no reliable way to quantify the savings attributable to CLEO.

## Evaluation Findings

Organized by topic area, this section describes Cadmus' findings obtained through the evaluation.

- CLEO Program Goals and Program Theory
- 2010-2012 Budget Cuts
- 2010-2012 Seminar and Booth Participation
- Entry into the Spanish Language Community
- Market Characterization of Language Barrier
- Relationship between CLEO and HEES
- SCE Phone and Program Website In-Language Support
- Extent to Which CLEO Is In-Language
- Implementation of 2006-2008 Evaluation Recommendations
- CLEO Seminar Participant Experience

### ***CLEO Program Goals and Program Theory***

According to SCE program staff, the primary goal for CLEO is to provide basic education about energy efficiency to communities that are not fluent in English. CLEO is not designed to direct participants to any one particular SCE program, although program information that may be especially relevant to the targeted audience is provided. The *2010-2012 Statewide HEES and CLEO Program Theory* document describes CLEO as a “feeder program” for HEES. However, our interviews with program staff revealed that while CLEO does offer seminar attendees the opportunity to sign up for an in-home energy-efficiency survey, such recruitments are not the only focus of the seminar. Thus, it is Cadmus' opinion that combining the HEES and CLEO programs together in one logic model may suggest CLEO has a greater emphasis on HEES than the other program offerings, but ultimately there was no obvious discrepancy between the logic model and the program delivery.

### ***2010-2012 Budget Cuts***

Program stakeholders said SCE's across-the-board budget cuts to its energy-efficiency programs made it more challenging for CLEO to achieve its targets. SCE reduced CLEO's budget by about 20%, which limited the program implementer's ability to market the program, attend events, and host seminars. Consequently, there were fewer CLEO seminars, which resulted in the program reaching fewer customers.

Stakeholders also said that the reduced budget prevented them from implementing new ideas to improve the program, such as tracking subsequent program participation or behavior changes after seminar attendance.

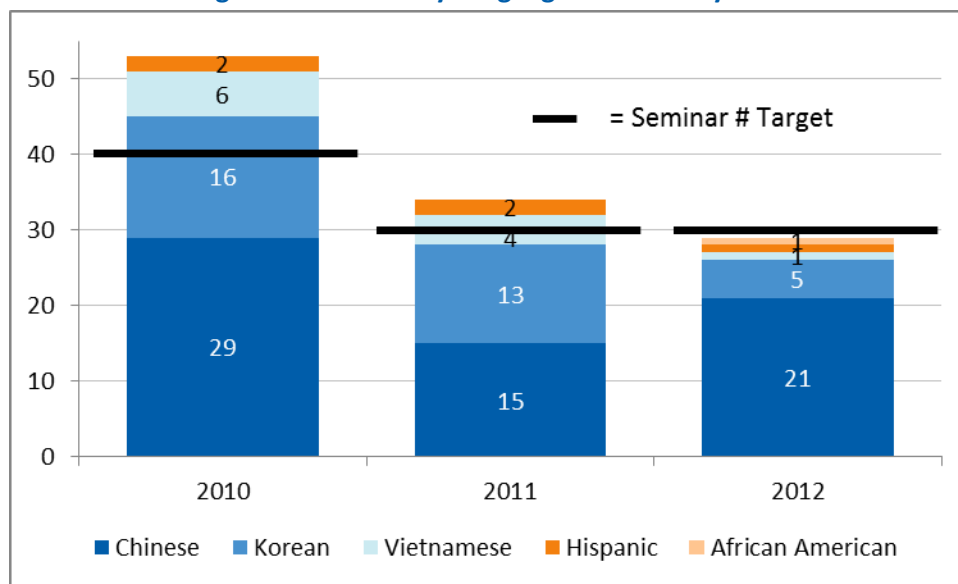


## 2010-2012 Seminar and Booth Participation

### Seminar Participation

The numbers of CLEO seminars conducted for each language group are shown in Figure 5, and the majority of seminars conducted to date have targeted the Chinese- and Korean-language communities. Our analysis of the program data shows a decline in the annual number of CLEO seminars during the 2010–2012 program cycle. The program and implementer staffs reported that the decline is primarily due to across-the-board budget cuts during this program cycle. However, the program exceeded its targeted number of seminars for 2010 and 2011, and has nearly met the 2012 seminar targets.

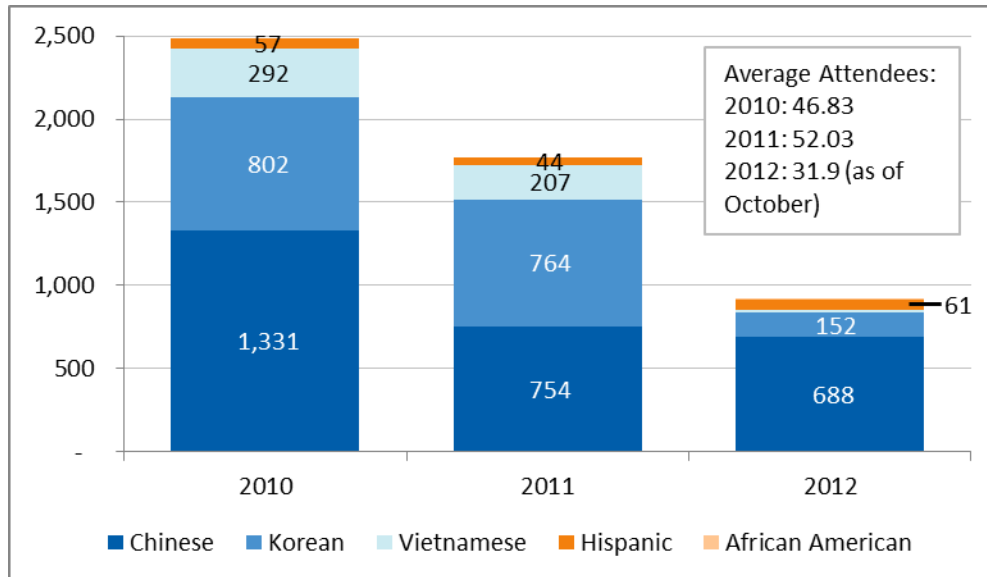
Figure 5. Community Language Seminars by Year



The decline in the number of seminars reduced the total seminar attendance, as shown in Figure 6. According to the program implementer’s statement of work, the implementer had a target of 35 attendees at each seminar, on average. For 2010 and 2011, these targets were exceeded; however, the number of seminar attendees averaged 31.9 for 2012.



Figure 6. Total Community Language Seminar Attendance by Year



We compared the seminar attendee data against zip codes deemed hard to reach, and the findings are in Table 2. Over half of the total attendees live in such zip codes, and in particular the Chinese and Hispanic language seminar attendees predominantly live in hard to reach areas.

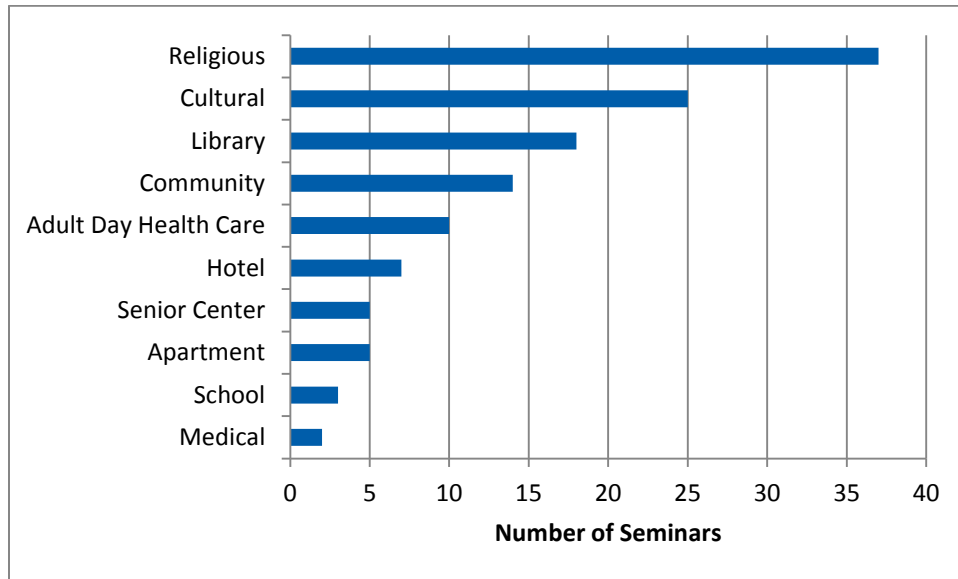
Table 2. Seminar Attendees in Hard to Reach Zip Codes

Seminar Language	Number in Hard to Reach Zip Code	Total Number of Attendees	% in Hard to Reach Zip Code
Chinese	1,956	2,980	66%
Korean	506	1,814	28%
Vietnamese	218	615	35%
Hispanic	156	170	92%
African American	1	12	8%
<b>Total</b>	<b>2,837</b>	<b>5,591</b>	<b>51%</b>



Figure 7 shows the types of venues where GES held CLEO seminars during the 2010-2012 program cycle. Based on Cadmus' assessment, the most common venues were religious places (such as churches), followed by cultural centers and libraries.

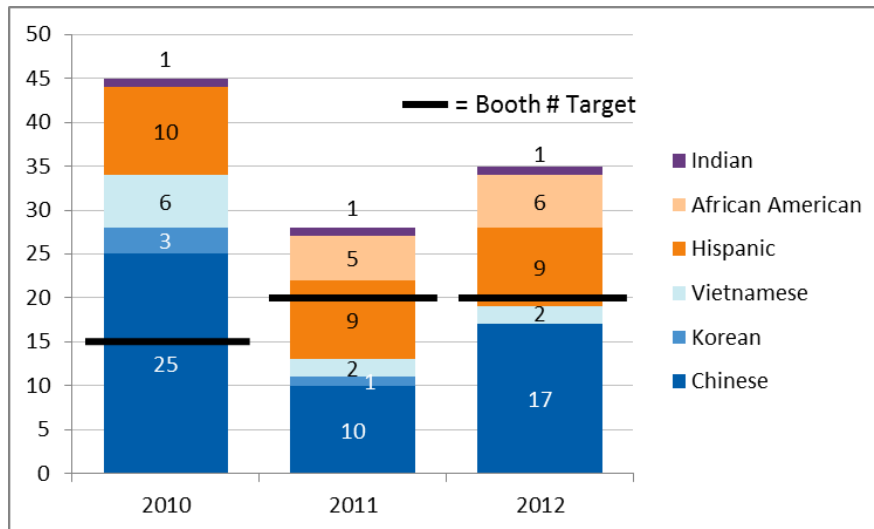
**Figure 7. Number of CLEO Seminars by Venue Type, 2010-2012**



### Booth Participation

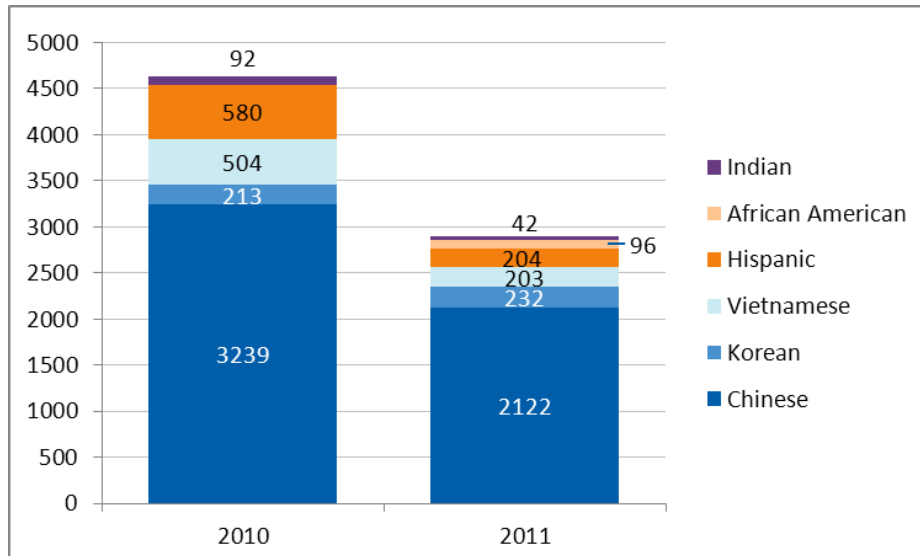
According to the booth attendance data Cadmus received from the program, GES hosted CLEO booths at 45 events in 2010, 31 events in 2011, and 35 events in 2012. This exceeded GES' targets of 15 booths in 2010 and 20 booths in both 2011 and 2012. Most of the booths were at Chinese language community events, with Hispanic language events hosting the next highest number of booths (Figure 8).

**Figure 8. Number of Booth Events by Language Community for 2010 - 2012**



Booth attendance declined about the same percent as the number of booth events did between 2010 and 2011, as shown in Figure 9. The 5-minute HEES surveys were discontinued in 2012 and attendance data was not recorded for that year.

**Figure 9. Booth Attendance by Language Community for 2010 and 2011**



### **Entry into the Spanish Language Community**

While GES staff say it has well-established connections with Asian communities (through community centers and churches), it is still building an infrastructure with the Hispanic community. The budget cuts affected GES’ ability to reach the Hispanic community since advertising costs are from 2.5 to 3 times the cost of similar marketing efforts for Asian communities. These higher advertising costs reflect the larger market reach and greater sophistication of media establishments serving the Hispanic community.

GES’ contract for the 2010-2012 cycle included outreach to Hispanic communities. However, because of delays with contracting, GES did not begin targeting this population until 2011. Thus, the initial ramp-up for outreach and marketing to Hispanic populations occurred in 2012.

Reaching the Spanish-language community in 2010-2012 was a challenge for GES. Stakeholders said they had difficulty because Hispanic populations tend to be wary of unknown organizations that resemble government agencies. Stakeholders also said that those in the Hispanic community are often wary of free items or offerings, as they are concerned that there will be a back-end cost. So to build trust and recognition, GES is using an approach that emphasizes engaging with established Hispanic community organizations.

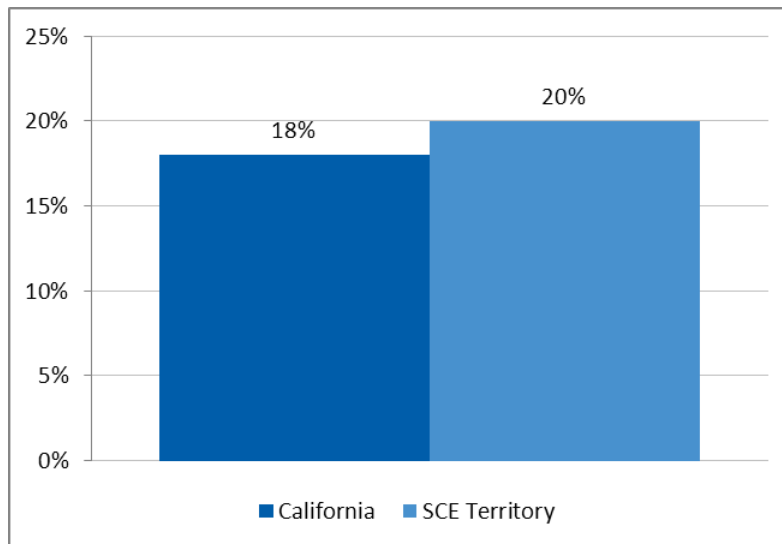
Stakeholders expect the 2013-14 program cycle to reflect greater participation by Spanish-language customers as the program’s efforts in 2012 building inroads start to come to fruition.



### Market Characterization of Language Barrier

Cadmus estimated the size of CLEO’s target market and the distribution of languages spoken within this population. Using the five-year summary data<sup>3</sup> from the United States Census Bureau’s *American Community Survey (ACS) 5-Year Summary Data* on language use, we characterized the population of California’s Los Angeles (LA) metropolitan-area residents who speak English “less than very well” (Figure 10).

**Figure 10. Percentage of Population That Does Not Speak English Very Well**

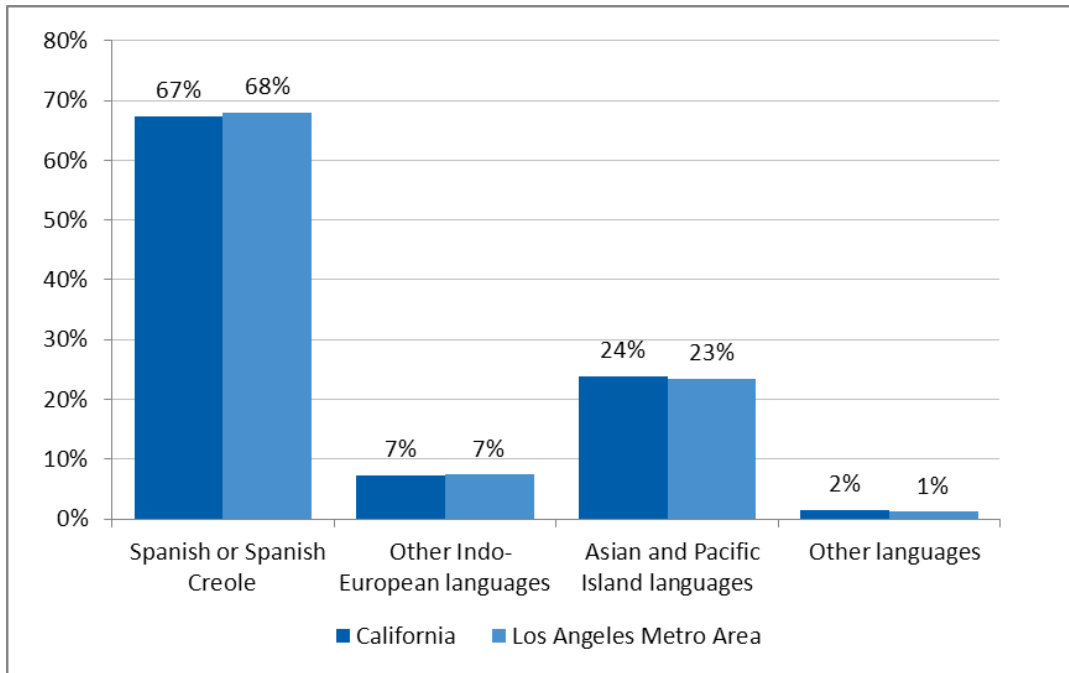


We found that 20% of the LA population (SCE service territory) does not speak English very well, and they could potentially benefit from in-language services, such as those delivered through CLEO.

Next, we examined the distribution of primary languages spoken by the population described as “speaking English less than very well.” Figure 11 shows that the largest portion of this population speaks Spanish as a primary language, followed by the portion that speaks Asian/Pacific Island languages. Comparing this distribution to the CLEO seminar participation (2-7% of total seminar participants are from Hispanic communities, shown previously in Figure 6) indicates the CLEO program was underserving the Spanish-speaking community in 2010-2012.

<sup>3</sup> ACS 2005-2009 5-Year Estimates.

**Figure 11. Languages Spoken by Population That Does not Speak English Very Well**



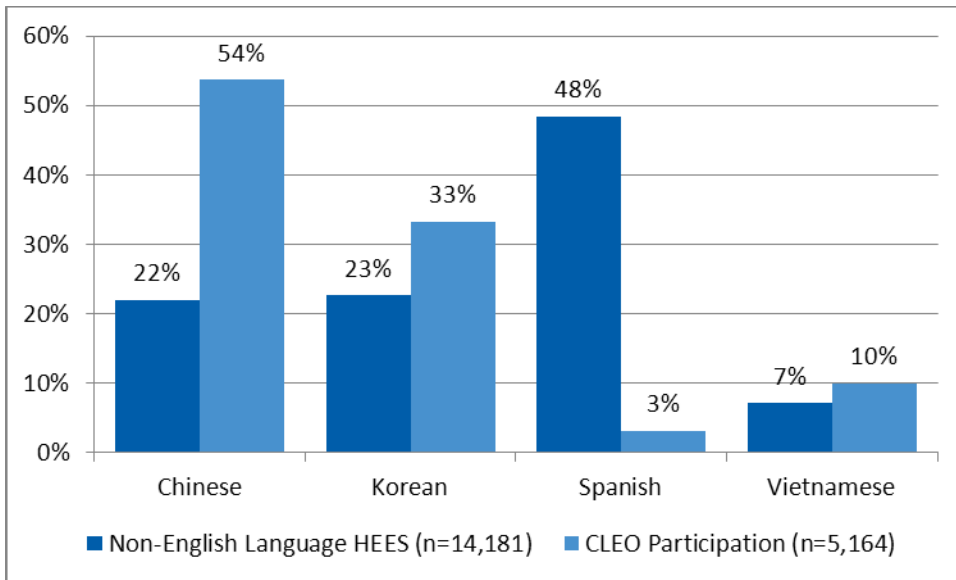
***Relationship between CLEO and HEES***

In addition to implementing the CLEO program, GES also is one of the parties that delivers the Home Energy Efficiency Survey (HEES) program, which provides energy surveys in five languages (English, Chinese, Spanish, Korea, and Vietnamese). GES markets HEES independently from CLEO, although CLEO seminar participants are offered an opportunity to participate in HEES.

We compared the distribution of in-language participation in the HEES program overall against that of CLEO under the assumption that participation in HEES would mirror CLEO participation if CLEO was indeed a primary driver for HEES participation in the 2010-2012 cycle. As shown in Figure 12, CLEO participation does not parallel HEES in-language participation so there was no supporting evidence that CLEO participation strongly drove HEES in-language participation.

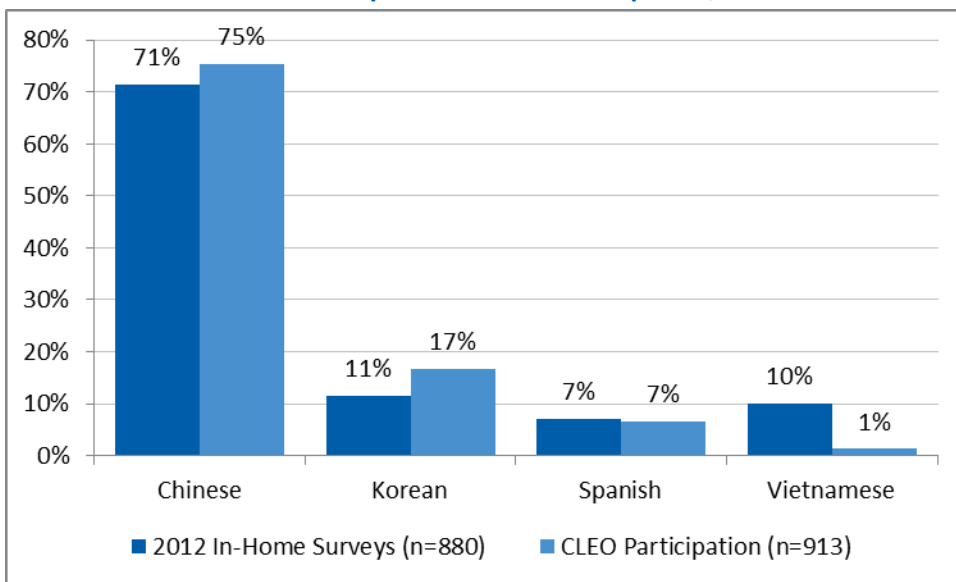


**Figure 12. Non-English Speaking HEES Participants vs. CLEO Participants, by Language, 2010-2012**



Next, we examined the language distribution of the subset of in-language HEES that GES provided to CLEO seminar participants in 2012. As shown in Figure 13, the language distribution of CLEO participants who received an in-language HEES from GES better parallels the CLEO seminar language distribution than the overall non-English language HEES participation. This suggests the CLEO seminar is a strong driver for GES' HEES service.

**Figure 13. Primary Language of In-Home Surveys Delivered by GES to CLEO Participants vs. CLEO Participation, 2012**



## *SCE Phone and Program Website In-Language Support*

To determine whether the SCE programs promoted by CLEO offer in-language support, Cadmus reviewed energy-efficiency program websites and language options offered by the telephone support lines.

Overall, we found that SCE energy-efficiency support phone lines and program websites are available in multiple languages.

- While the main SCE energy-efficiency phone number is supported in English only, SCE staff said that when customers call the multi-lingual hotline, the call center staff connects these customers with a translator and the energy-efficiency staff, who together can provide information in a caller’s language.
- Although program websites provide information in all of the CLEO languages, most program applications are only available in English. SCE is investigating translating these applications into other languages.

Table 3 summarizes the findings from our review of various SCE energy-efficiency program websites and phone numbers.

**Table 3. Phone and Website Support for Non-English Languages**

	<b>Program</b>	<b>Website Notes</b>	<b>Phone Notes</b>
1	ENERGY STAR Refrigerators (HEER)	Program information in Spanish, Korean, Chinese, Vietnamese, but application in English	1-800-736-4777 is the main number for energy-efficiency information; however, the language is English. SCE has a general number for non-English callers on its “Contact Us” page.
2	Fridge/Freezer Recycling	Program information in Spanish, Korean, Chinese, Vietnamese, but application and brochure in English	1-800-234-9722, has an option for Spanish
3	Summer Discount Program	Program information in Spanish, Korean, Chinese, Vietnamese	Same as #1
4	Whole House Fan	Program information in Spanish, Korean, Chinese, Vietnamese, but application in English	Same as #1
5	Upstream Lighting	Program information in Spanish, Korean, Chinese, Vietnamese, but scelampexchange.com in English	Same as #1
6	Pool Pump & Motor	Program information in Spanish, Korean, Chinese, Vietnamese, but application and product list in English. Installer/contractor information is unavailable.	Same as #1
7	Other HEER/SCE site items	Program information in Spanish, Korean, Chinese, Vietnamese, but application in English	Same as #1
8	Energy Upgrade California	Limited Spanish and Chinese support (not whole site)	Same as #1
9	CARE/FERA	Program information in Spanish, Korean, Chinese, Vietnamese, and application is translated as well into Spanish, Chinese, etc.	Same as #1



	Program	Website Notes	Phone Notes
10	Energy Savings Assistance Program	Program information in Spanish, Korean, Chinese, Vietnamese	Same as #1
11	Multifamily	Program information in Spanish, Korean, Chinese, Vietnamese, but application in English	Same as #1

### Extent to Which CLEO Is In-Language

While most CLEO materials are translated, Cadmus found exceptions. For example, some of the charts or graphics taken from other sources were not translated, as shown in Figure 14.

Figure 14. Comparison of Chinese and English Language Seminar Slides



Similarly, certain portions of the CLEO website—which is still under development—are only available in English, regardless of what language portal is selected. The English-language materials include PDF documents and the testimonials page, as shown in Figure 15.

Figure 15. Example of English Testimonials on Other Language Sections of the CLEO Website

The screenshot shows the CLEO website interface. At the top, there are language selection options: English, 繁體中文 (Traditional Chinese), Tiếng Việt (Vietnamese), 한국어 (Korean), and Español (Spanish). Below this is a search bar with the text 'Search' and a '搜索' (Search) button. The phone number '888.898.6788' is displayed with a '請聯繫' (Please contact) icon. A navigation menu contains: 主頁入門 (Home Introduction), 相關資訊 (Related Information), 社區活動 (Community Activities), 節能方法 (Energy Saving Methods), 資源通訊 (Resources and News), and 聯絡方式 (Contact Us). The main content area features a testimonial under the heading '建議' (Recommendation) for Mike Eng, State Assemblyman for the 49th District. The testimonial text reads: "...The Biggest challenge is how to save energy. I'm here to support the efforts. I've started the first Environmental Commission in the San Gabriel Valley and the City of Monterey Park when I was Mayor of Monterey Park....Thank you for all the work that you do...". To the right, there is a 'QUICK LINKS' section with two items: '節能研討座談會' (Energy Saving Seminar) and '居家能源評估' (Home Energy Assessment).



## Implementation of 2006-2008 Evaluation Recommendations

Most of the recommendations from the 2006-2008 evaluation were focused on the seminar portion of the CLEO program. An account of what was implemented—and what was not—is presented in Table 4, which also contains brief explanations based on program staff interview responses and notes from our review of program materials and procedures.

**Table 4. Implementation of 2006-2008 Evaluation Recommendations in 2010-2012**

Area	2006-2008 Recommendation	Cadmus Findings	Explanation
Program Design	Tailor seminar content to differences in baseline knowledge	Not implemented	All CLEO seminar participants are assumed to have little, if any, knowledge about energy efficiency. Seminar materials are not tailored by language group.
Program Process	Keep exit survey data in a usable format with ability to connect responses to community	Not implemented	GES does not segregate survey responses by language community. GES and SCE found survey responses were similar across all language groups.
	Revise exit survey to conform to Likert scale	Implemented	Scale is now five point Likert: Very good, good, neutral, poor, very poor
	Create and monitor sign-in sheets	Implemented	GES required sign-in for each seminar attendee.
	Implement QC to assure presenter quality	Implemented	SCE conducts quarterly trainings with GES to review any program changes. Monthly, GES conducts internal training with seminar presenters, providing practice opportunities and program updates.
Implementation	Address HEES at beginning and end of seminar; include HEES success stories	Not implemented	Addressing HEES at the beginning of seminars would disrupt the flow of the seminar and emphasize HEES over other programs. Also, HEES is more appropriate at the end of the seminar as a next step. There is not enough time to present HEES case studies.
	Include typical financial benefits for energy efficiency	Partially Implemented	Seminar slides for refrigerator recycling, clothes washer, and lighting provide estimated bill savings
	Highlight typical implementation considerations (cost/effort)	Partially implemented	Participants can ask questions about their own situation during Q&A sessions, or get a home energy-efficiency survey for further information.
	Distinguish between actions for all vs. actions for owners	Not implemented	CLEO seminars are designed to provide a basic, uniform introduction to energy efficiency.
	Avoid recruiting participants from retirement homes or from venues that target people who do not make decisions about energy using equipment or features that affect energy use*	Partially implemented	No seminars were held at retirement homes or assisted living facilities based on our review; however, a number of seminars were hosted at adult day health care centers. According to the U.S. Department of Health and Human Services, “Adult day health care offers more intensive health, therapeutic and social services for individuals with severe medical problems and those at risk of requiring nursing home care.”**

\*This recommendation was developed after the 2006-2008 process evaluation, when SCE discovered that the Koreans did not take any action after CLEO because they resided in retirement homes.

\*\* [http://www.eldercare.gov/ELDERCARE.NET/Public/Resources/Factsheets/Adult\\_Day\\_Care.aspx](http://www.eldercare.gov/ELDERCARE.NET/Public/Resources/Factsheets/Adult_Day_Care.aspx)



### **CLEO Seminar Participant Experience**

Cadmus surveyed 120 SCE customers who attended a CLEO seminar in 2012. This section will present the results of that survey covering respondent satisfaction, seminar recall, and post-seminar-behavior.

The results of the demographics section are in Appendix A: Survey Respondent Demographics, and the full survey instrument is in Appendix B: Phone Survey Instrument.

Of these 120 respondents:

- 87 said they are also Southern California Gas customers,
- 19 did not have natural gas in their home, and
- 15 did not know who their gas provider is.

Figure 16 shows the distribution of CLEO language seminars the respondents attended.

**Figure 16. Survey Respondent Seminar Language (n=120)**

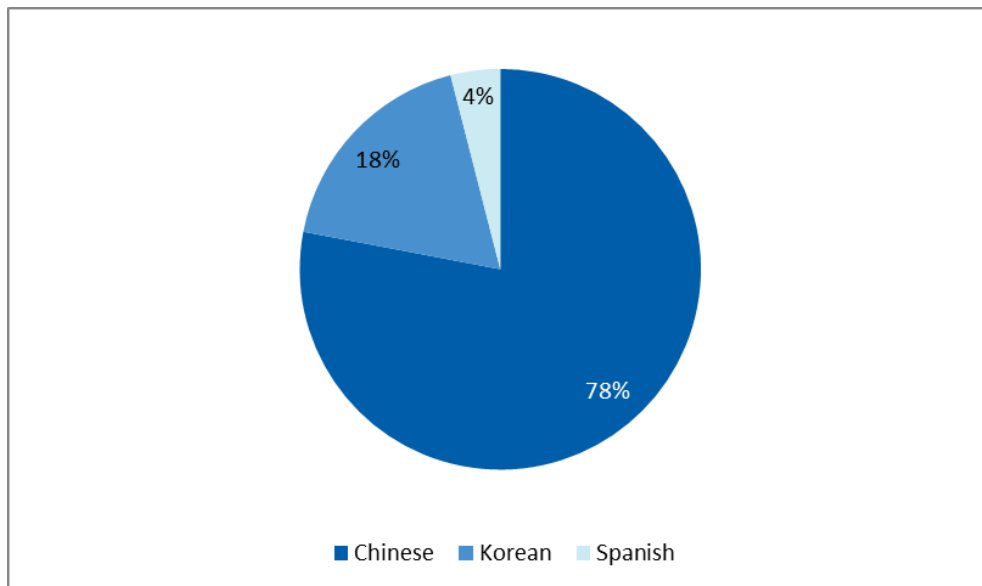
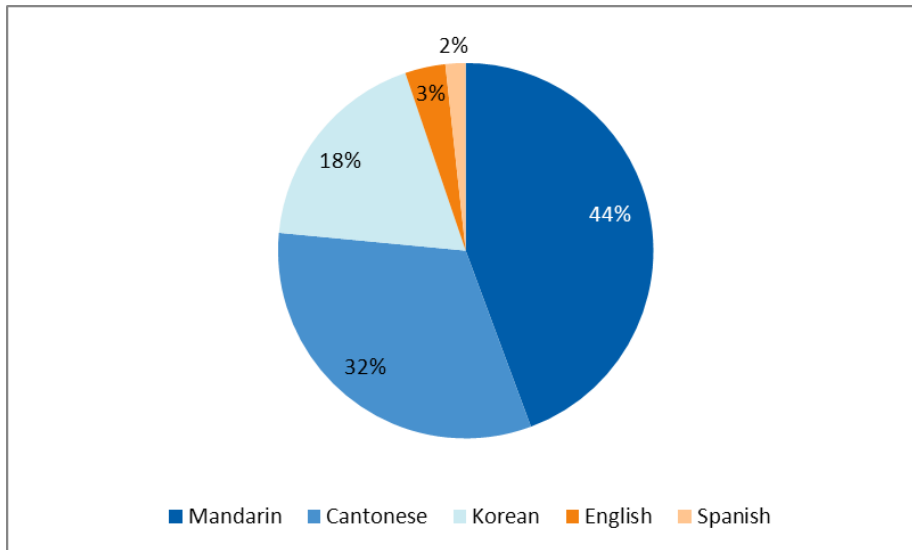


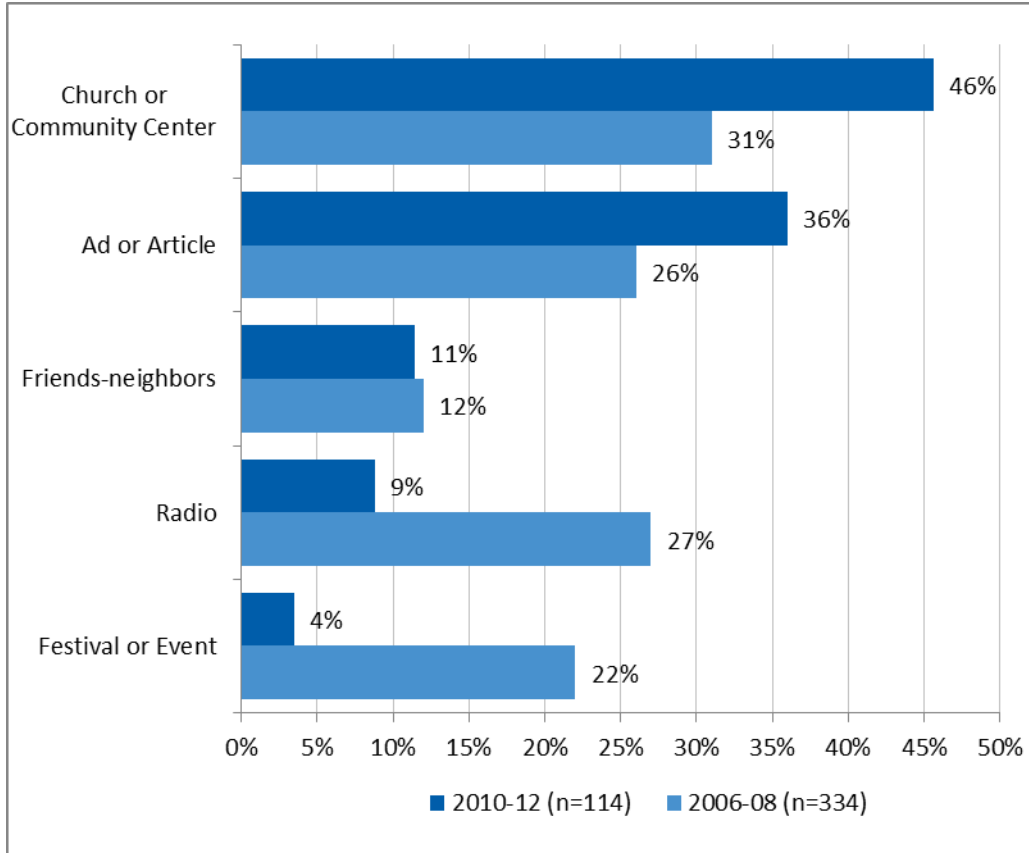
Figure 17 shows the languages (and the corresponding percentages) that respondents reported speaking in their homes. Six percent of respondents wanted to take the survey in English and only 3% of respondents said English is the primary language spoken in their household.

Figure 17. Languages Spoken at Home (n=115)



As shown in Figure 18, respondents heard about the seminar primarily through churches or community centers, with newspaper ads and articles as the second most-cited source. In contrast, the 2006-2008 evaluation results show more respondents learned about the seminar through events or radio ads.

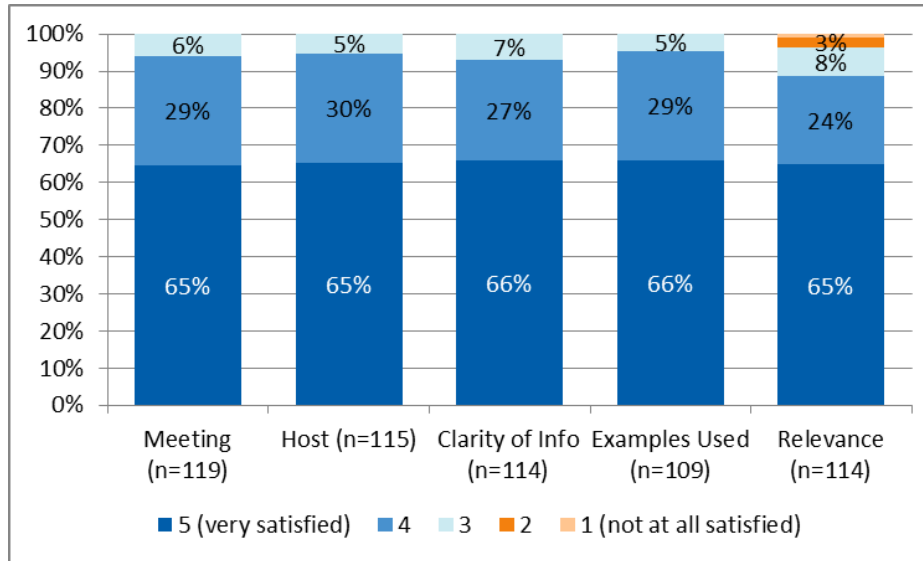
Figure 18. How Respondents Heard About the Seminar



## Customer Satisfaction

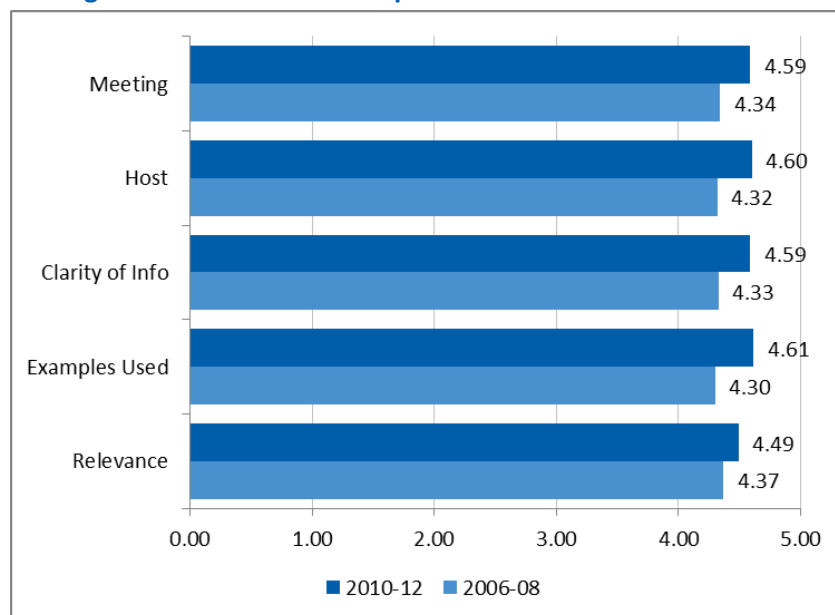
Cadmus asked respondents to rate their satisfaction with different aspects of the seminar on a scale ranging from 5 (very satisfied) to 1 (not at all satisfied). Overall satisfaction with the seminar was consistently high, as seen in Figure 19. Over 90% of respondents said they were satisfied or very satisfied with various aspects of the seminar. The only category receiving “less than satisfied” ratings was the one regarding the relevance of the information presented, but only three percent provided this response.

**Figure 19. Satisfaction with Seminar**



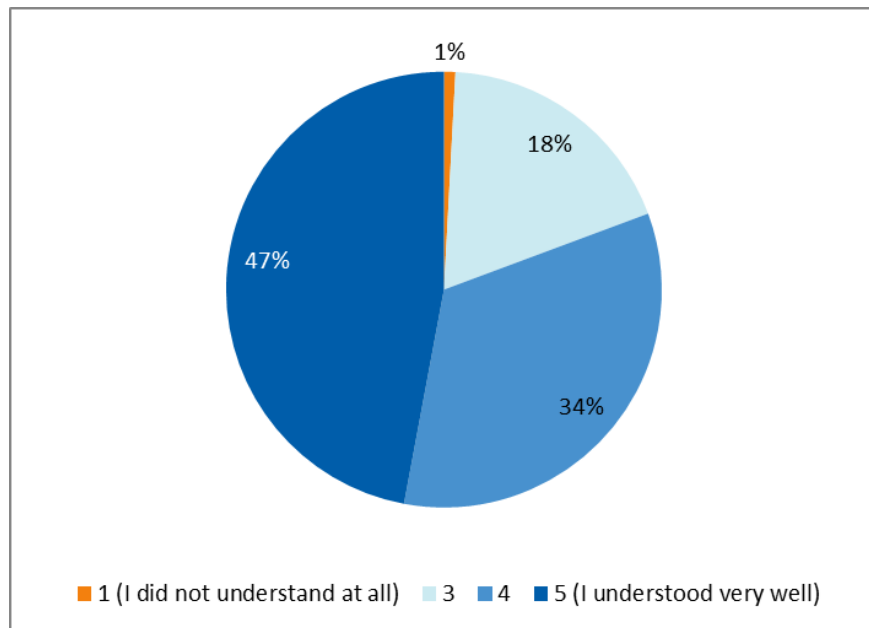
As shown in Figure 20, the average satisfaction scores for the 2010-2012 evaluation period are slightly higher across all topics, as compared to the previous evaluation.

**Figure 20. Satisfaction Comparison with Previous Evaluation**



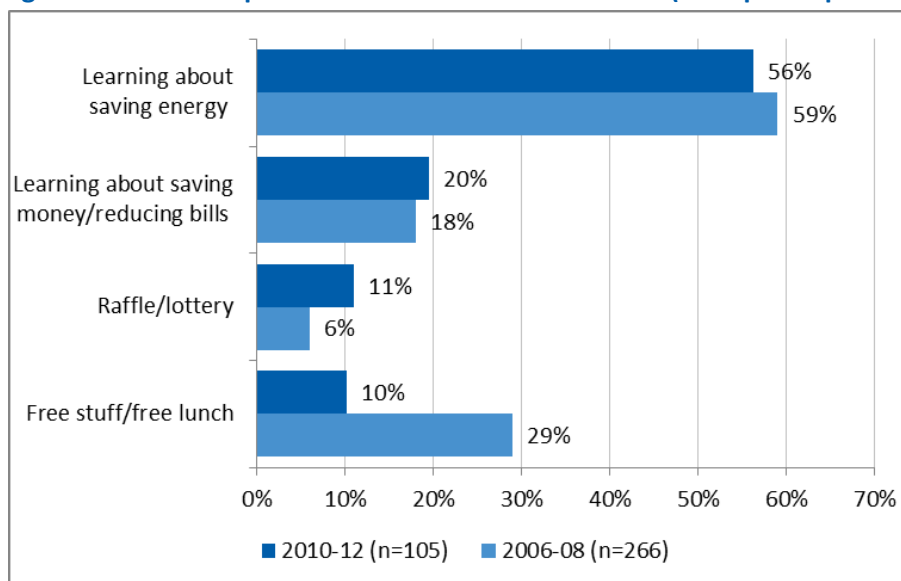
Using a scale that ranged from 1 (“I did not understand at all”) to 5 (“I understood very well”), respondents rated their understanding of ways to save energy after they attended the seminar. More than 80% said they understood how to save energy following the seminar, as shown in Figure 21.

**Figure 21. How Well Respondents Understood How To Save Energy after Seminar (n=119)**



What respondents liked best about the seminar was learning how to save both energy and money, as shown in Figure 22. These responses were similar to those for the 2006-2008 evaluation survey, with the exception of significant declines in the “free stuff/free lunch” and “chance to socialize” categories.

**Figure 22. What Respondents Liked about the Seminar (multiple responses)**



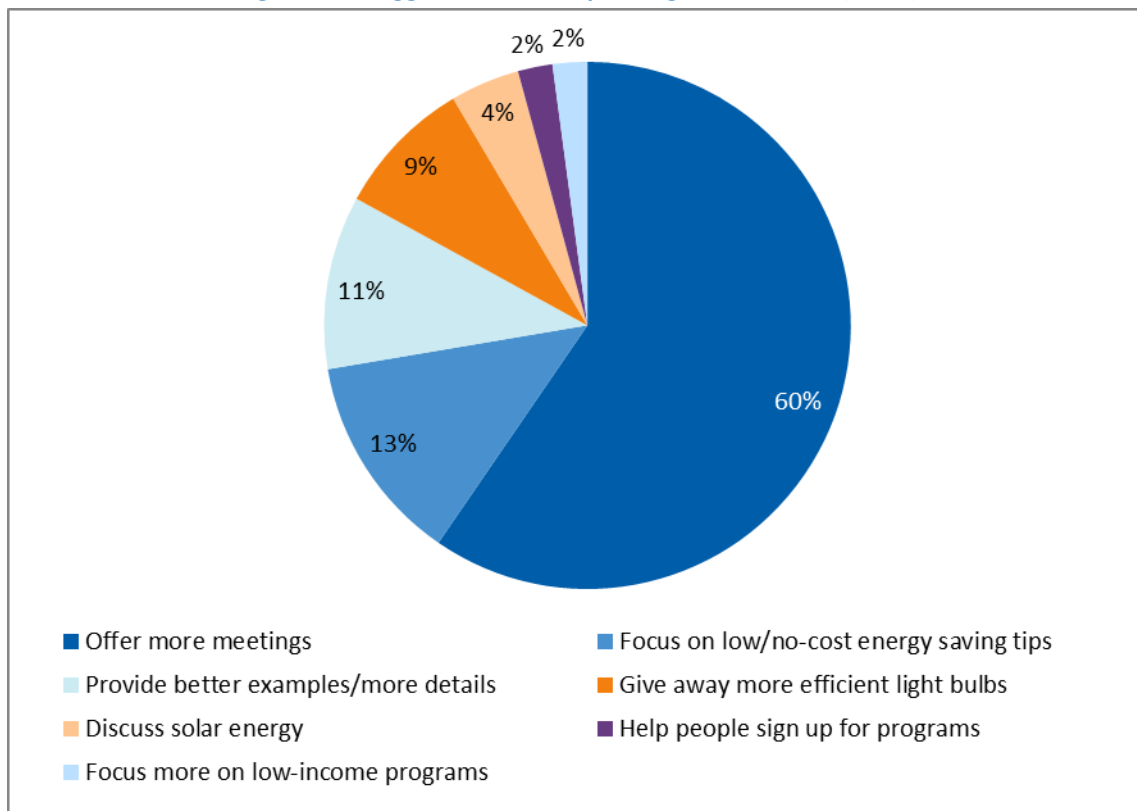


Only five respondents indicated that they disliked something about the seminar, and their specific complaints were these:

- They had difficulty understanding the host, either due to a specific accent or the host being perceived as too quiet.
- The seminar was too short.
- The seminar location was too far away.

Respondents provided suggestions for improving the seminar, as shown in Figure 23. The demand for CLEO’s services in these communities is evidenced by the fact that 60% of the 47 respondents offering suggestions wanted more meetings. The next highest responses were for the seminar to focus on low-cost or no-cost saving tips, provide more examples, and give away more energy-efficient light bulbs.

**Figure 23. Suggestions for Improving the Seminar (n=47)**

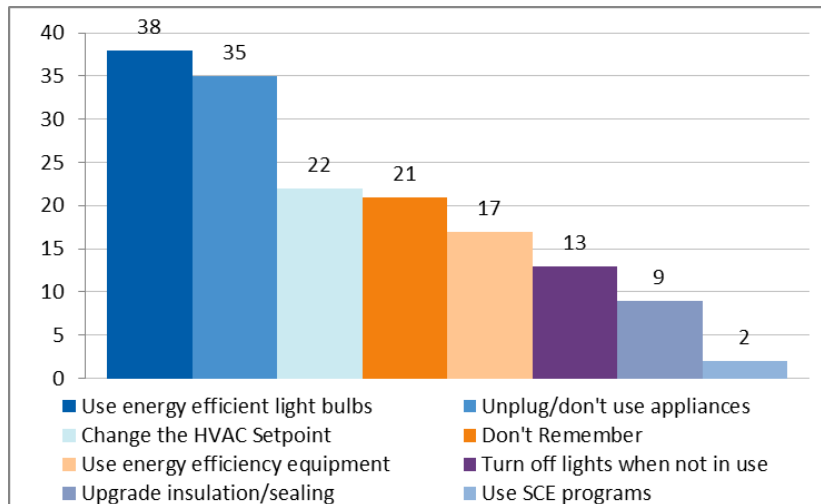


### Seminar Content Retention: Energy Guzzlers

A majority of respondents (79%) recalled hearing about energy guzzlers from CLEO. The CLEO seminar handout lists the top energy guzzlers as: central air conditioner, refrigerator, ducted evaporative cooler, clothes dryer, electric stove, pool pump, freezer, portable heater, flat screen TV, and dishwasher. Refrigerators were the most frequently recalled, with 61% of respondents recalling them, followed by 56% of respondents recalling central air conditioners as an energy guzzler.

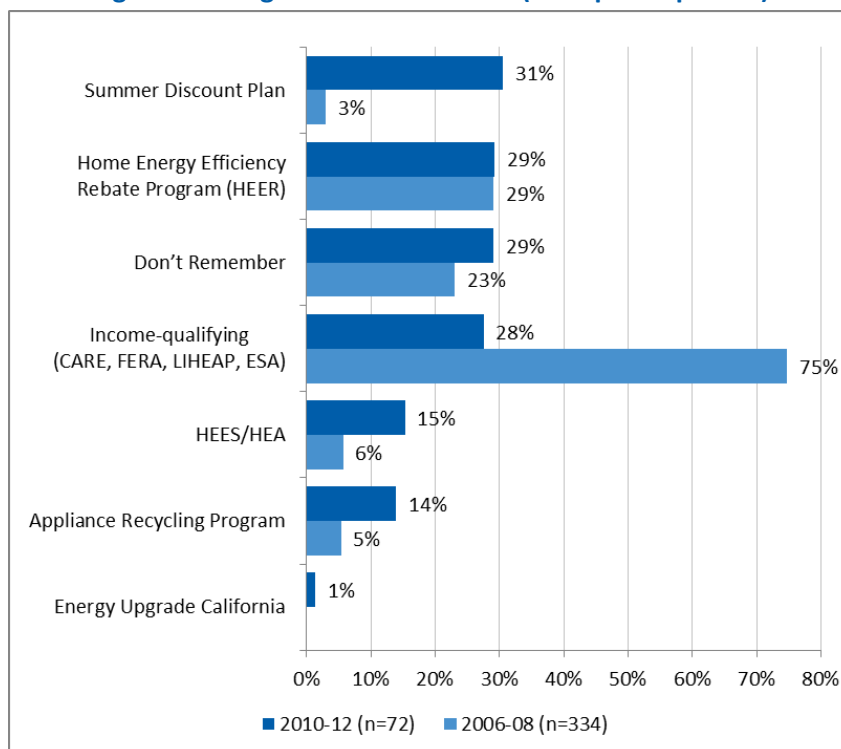
The energy-saving tips that respondents remembered hearing from the seminar are shown in Figure 24. The top responses were using energy-efficient light bulbs and not using appliances during peak times.

**Figure 24. Energy Saving Tips Recalled Most Often (n=99, multiple responses)**



Cadmus asked respondents what energy-efficiency programs they recalled that were mentioned during the CLEO seminars. As shown in Figure 25, the Summer Discount Plan program was remembered by almost one-third of respondents who were surveyed in the 2010-2012 cycle. Other program mentions were Home Energy Efficiency Rebate, LIHEAP, and the In-Home HEES.

**Figure 25. Programs Recalled Most (multiple responses)**





### Post-Seminar Behavior and Seminar Influence

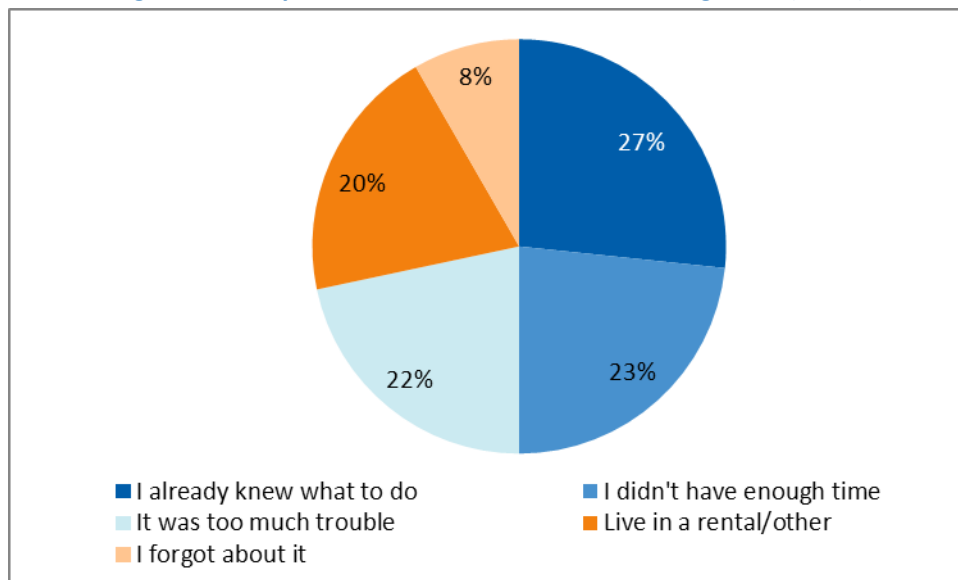
CLEO seminar respondents could sign up for an In-Home HEES. Only slightly more than one-quarter of respondents (28%) said they obtained the free survey.

Of the respondents who did not have the In-Home Efficiency Survey done, their main reasons were these:

- They already knew what to do to save energy.
- They didn't have time.
- It was too much trouble.

In addition, 20% of respondents lived in either a rental home or other residence type that caused them to be ineligible for the in-home survey (Figure 26).

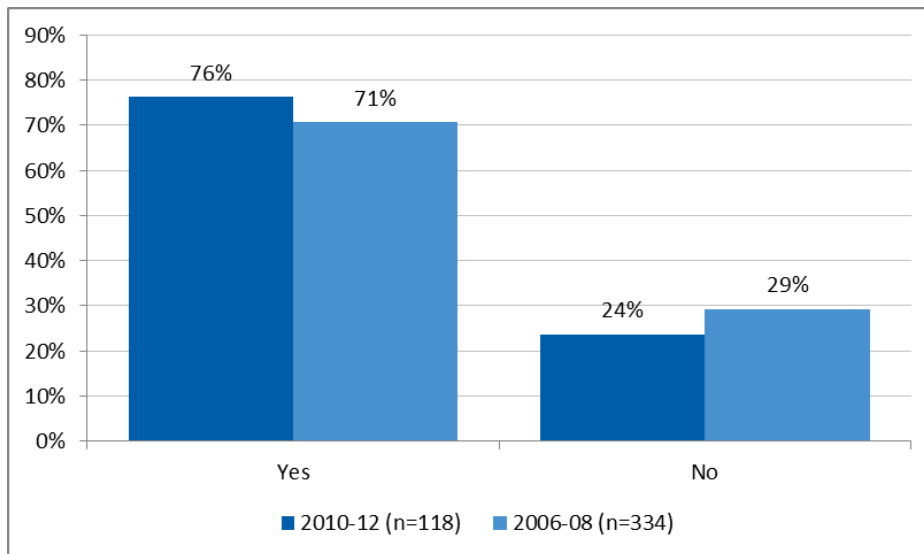
**Figure 26. Respondent Reasons for Not Obtaining HEES (n=60)**



Over three-quarters of the survey respondents said they had installed energy-efficient equipment of some type after the seminar (Figure 27). This is slightly more than the respondent reports from the 2006-2008 evaluation.



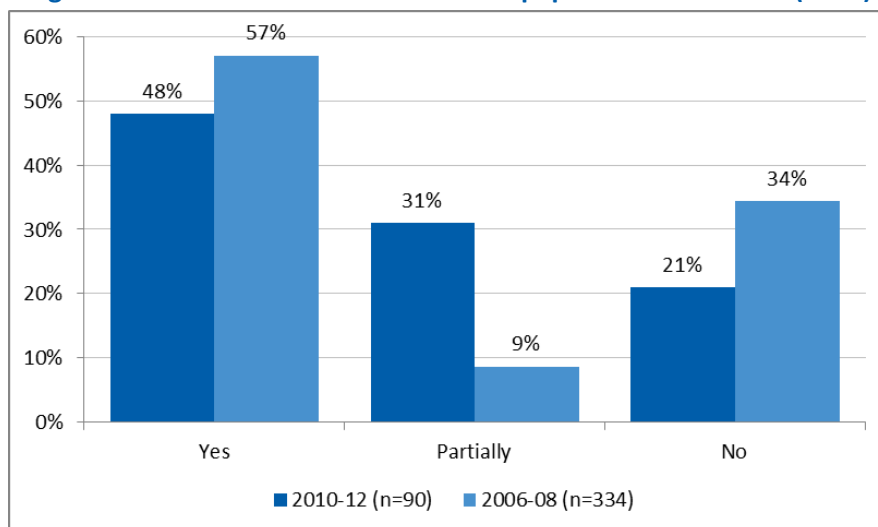
**Figure 27. Respondents Who Said They Installed Efficient Equipment after the Seminar**



Of those respondents who reported installing equipment after the seminar, 89% installed light bulbs, which is higher than the 68% of respondents who reported installing lighting equipment in the 2006-2008 program cycle. (However, it is unknown whether these were bulbs purchased or received as part of the seminar gift bag.) The remaining 11% of efficient equipment that respondents reported they installed was distributed across four other measures (refrigerator, clothes washer, showerhead, air conditioning) each installed by no more than 5 respondents.

Figure 28 shows the influence of the seminar on respondents' decision to install efficient equipment. Almost half said the seminar had a direct influence on their decision to install energy-efficient equipment, while 31% said they were partially influenced by the seminar. Overall, full or partial seminar influence was higher in 2010-2012 than in 2006-2008.

**Figure 28. Influence of the Seminar on Equipment Installations (n=90)**

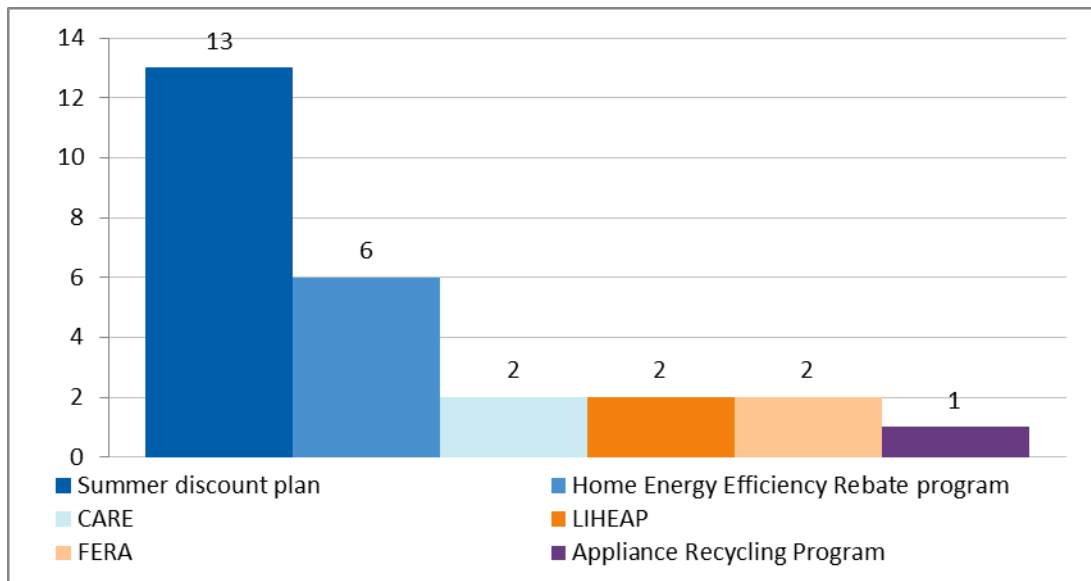




When respondents were asked if they had received a rebate for the equipment they installed, only 28% said they had. In 2010-2012, slightly more than one-quarter of survey respondents said they had participated in a program, which is much higher than the participation levels (which ranged from 5% to 7%) that were reported in the 2006-2008 evaluation.

Over half of the survey respondents who reported participating in a program were enrolled in the Summer Discount Plan and one-quarter received a program-sponsored rebate (Figure 29).

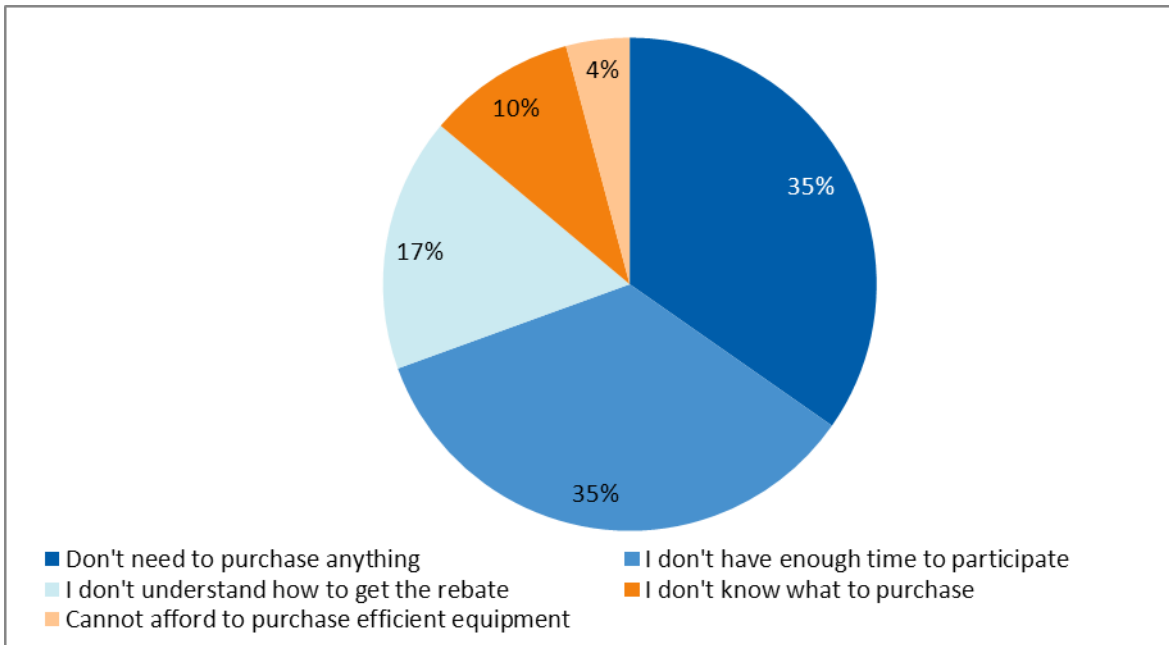
**Figure 29. Programs in Which Respondents Participated (n=24, multiple responses)**



When we asked program participants about the CLEO seminar’s influence, half said the seminar had influenced their decision to participate (46% said it influenced them, 4% said it partially influenced them).

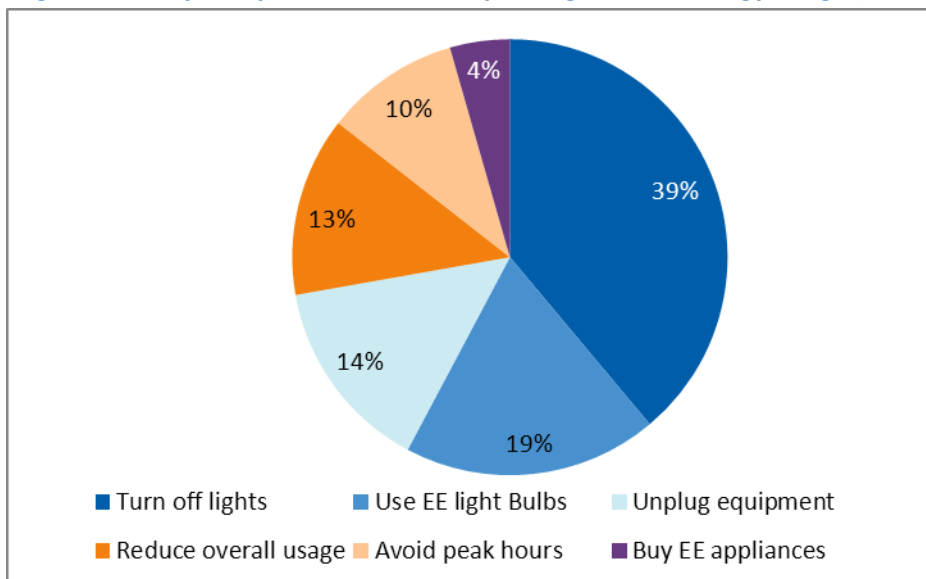
Of the survey respondents who did not participate in an energy-efficiency program, most said that either they had no need to purchase energy-saving equipment or they did not have enough time to participate. Regarding program-participation barriers the respondents encountered, 27% of the respondents who did not participate in a program either did not know how to get the rebate or did not know what to purchase to receive the rebate (Figure 30).

Figure 30. Barriers to Program Participation (n=72)



Three-quarters of respondents said they changed their energy use after the seminar. Figure 31, the most-common changes in energy use were turning off the lights when leaving a room. Other typical responses were using energy-efficient light bulbs and unplugging equipment.

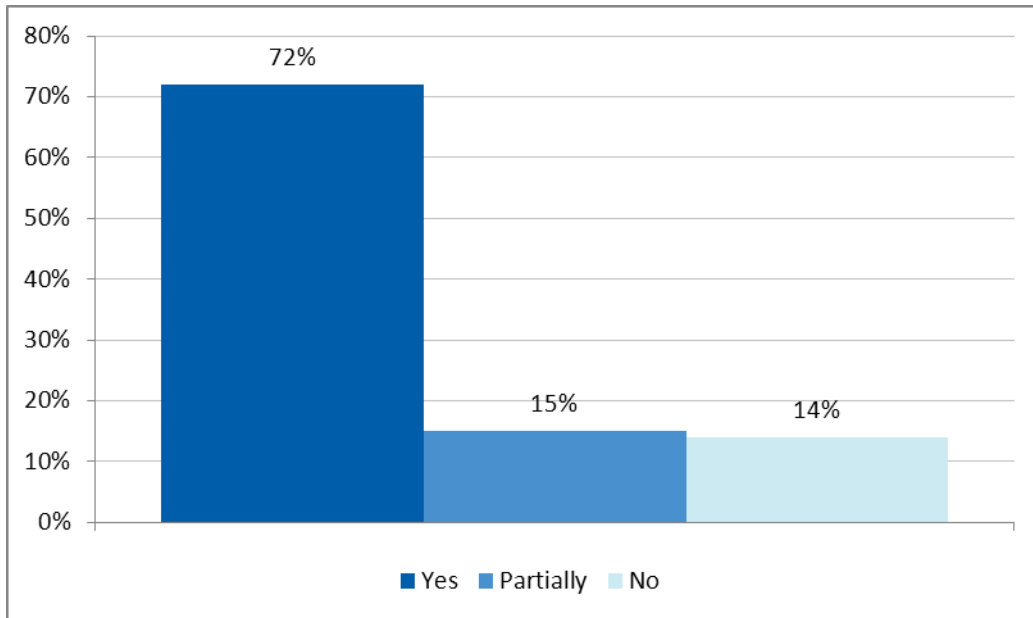
Figure 31. Ways Respondents Said They Changed Their Energy Usage (n=86)



Eighty-seven percent of respondents who reported changing their energy usage said that the seminar either fully influenced or partially influenced their behaviors (Figure 32).



**Figure 32. Influence of Seminar on Behavior Change (n=88)**



## Conclusions and Recommendations

### *Cadmus Conclusions and Recommendations*

This section contains Cadmus' conclusions and corresponding recommendations for improving the CLEO program.

**Conclusion 1. Program seminar and booth targets are being met, despite budget cuts.** While the budget cuts have limited the ways in which GES can follow up on program activities and expand outreach efforts, GES is still maintaining a successful level of engagement with the communities served.

**Recommendation 1.** Maintain existing relationships and build new ones within the targeted communities; utilize the relationships efficiently to continue meeting program goals.

**Conclusion 2. The Hispanic community was underserved in the 2010-2012 program years.** At the beginning of this program cycle, the Spanish-speaking community represented a large, untapped market for the CLEO program. There were hurdles that initially impeded the outreach effort that began late in the program cycle; however, the staffs of both the CLEO program and GES anticipate that the outreach will result in significant progress over the next program cycle evaluation.

**Recommendation 2.** Maintain a strong focus on outreach to Hispanic communities and establish relationships similar to those in Asian-language communities that have helped CLEO reach non-English speaking communities in past years.

**Conclusion 3. The potential market for CLEO's services is significant (up to 20% of Los Angeles area households), and seminar participants are receptive to basic energy education.** Because approximately one-fifth of the households in SCE territory speak English "less than very well," the in-language services appear very important for the area. A majority of survey respondents said they installed energy-efficient equipment after attending the seminar, and a high number attributed their actions to the influence of the seminar. More respondents in the 2010-2012 evaluation than in the previous evaluation reported participating in a SCE program. Thus, it appears that the CLEO program is serving this 20% of SCE customers' needs for education on energy efficiency and motivating them to take action.

**Recommendation 3.** If the budget allows, measure seminar influence by tracking the post-seminar activities of attendees. Consider using customer account numbers to monitor participation in other SCE programs or determining if energy bills have fallen after program participation.

**Conclusion 4. Seminar attendees are highly satisfied with the seminars and are very interested in learning about ways to save energy.** Approximately 90% of survey respondents said they were satisfied with all of the aspects of the seminar mentioned in our survey. The most common reason they gave for attending the seminar was to learn more ways to save energy. Also, we found a high level of recall among respondents regarding the information discussed in the seminar.

**Recommendation 4.** Continue conducting seminar QA/QC in monthly meetings to maintain quality and customer satisfaction.



**Conclusion 5. CLEO program staff responded to the 2006-2008 recommendations appropriately.** Based on our review of the rationale for implementing or not implementing the previous evaluation recommendations, we conclude that the program staff members have acted consistently with the goals of the CLEO program.

**Recommendation 5.** If the goal is to continue providing basic energy-efficiency education to non-English speaking customers, then CLEO should continue along its current trajectory. Program staff should determine if the actions customers take after attending CLEO seminars are satisfactory, and make adjustments to the seminar if more specific follow-up actions are desired.

**Conclusion 6. SCE’s in-language support continues beyond CLEO to program websites and phone support.** We found that SCE’s website and telephone support services are also available in multiple languages, which is important for CLEO participants who wish to take the next step participating in a program. However, energy-efficiency program application forms are still primarily in English only.

**Recommendation 6.** If CLEO will be continued, then program managers should (1) examine how customers not fluent in English will be able to follow through and participate in SCE programs; (2) determine if the English language program application form presents a barrier and take appropriate actions; (3) consider leading seminar and booth participants through the in-language SCE program websites and application forms (at the end of the seminar or during one-on-one sessions at the booth) to empower customers to look up needed information on their own; and (4) ensure the financial and other non-energy benefits of energy-efficiency upgrades are clearly communicated and emphasized.

### ***Additional SCE and ED Insights***

During the draft report review process, SCE and ED discussed the 2010-2012 process evaluation results for CLEO in the context of changes that had already occurred in the 2013-2014 cycle, and provided the following updates and recommendations to Cadmus.

#### *Evolution of CLEO Program Classification*

During the last three program cycles, the CLEO program shifted within the SCE portfolio. In 2006-2008, CLEO was a part of the Education, Training and Outreach Program. In 2010-2012, CLEO was a part of the Home Energy Advisor Program. In 2013-2014, CLEO became a part of the Workforce Education & Training (WE&T) Connections Program.

#### *2013 Green Job Training Pilot*

Since CLEO joined the WE&T Program, the SCE program team and the implementer added a workforce element that focuses on building green-job awareness for customers with limited English proficiency. During the fall of 2013, the CLEO team piloted a multi-week training course for unemployed individuals interested in entry-level green jobs. The training focused on the topics of energy efficiency, distributed generation, demand reduction, demand-side management and green career paths, plus training in software skills.

The vision of this training pilot is to encourage participants to do the following:

1. Seek entry level employment in “green energy” jobs
2. Further their knowledge of green topics by taking classes at community colleges

The training pilot concluded in November, 2013. SCE is waiting for the implementer’s self-assessment report, which will address the pilot’s outcome, best practices, and recommendations for next steps.

**SCE/ED Recommendations.** If the CLEO program team decides to expand this training pilot into 2014, then the next cycle of the measurement and evaluation (M&E) roadmap should include three actions: (1) provide rapid feedback on the results of the pilot program; (2) update the program theory and logic model to encompass the pilot; and (3) conduct an independent process evaluation to assess the effectiveness of this pilot program in the context of short-term and intermediate-term desired program outcomes. The process evaluation should also examine consistency with the overall WE&T program strategy.

In addition to updating the M&E roadmap, the CLEO team should also consider updating the educational content of CLEO to reflect SCE and ED priorities, such as incorporating integrated demand side management concepts.



# Appendix A: Survey Respondent Demographics and Segmentation

This appendix describes the results of a battery of questions SCE provided to Cadmus for the participant survey.

## Responses and Percentages

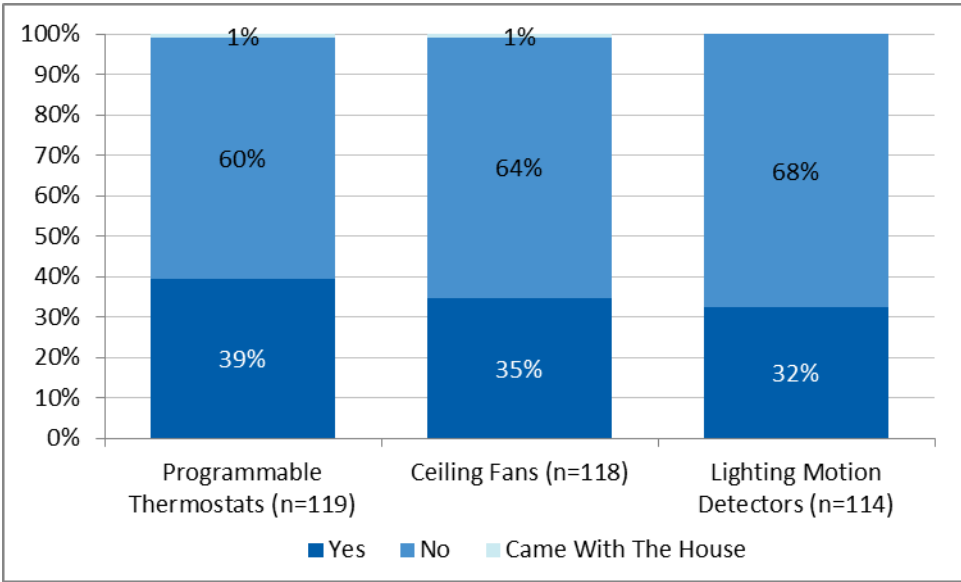
When respondents were asked whether they were aware of the term “carbon footprint,” most said they were not, as shown in Table 5.

**Table 5. Awareness of the Term “Carbon Footprint” (n=118)**

Answer	% of Respondents
Yes	15%
No	80%
Yes, but not sure what it means	5%

Figure 33 shows the energy-saving actions respondents have taken.

**Figure 33. Adoption of Energy Saving Actions**





Respondents were asked to rate, on a scale of 1 (strongly disagree) to 7 (strongly agree), their level of agreement with the statement that they “compare prices of at least a few brands.” More than three-quarters agreed with the statement (that is, they rated the accuracy of the statement at either 6 or 7). Table 6 shows the detailed responses.

**Table 6. Agreement with Statement: “I compare prices of at least a few brands before I choose one” (n=111)**

Agreement Scale Number	% of Respondents
1 (Strongly Disagree)	3%
2	1%
3	2%
4	5%
5	12%
6	14%
7 (Strongly Agree)	63%

Respondents were asked to use the same scale to rate the statement that they do “not feel responsible for conserving energy.” More than three-quarters strongly disagreed with that statement (that is, rated the statement at 1 or 2), as shown in Table 7. Somewhat surprisingly, 12% strongly agreed with this statement; it is unknown whether this response is correct or some of these respondents misinterpreted the scale.

**Table 7. Agreement with Statement: “I do NOT feel responsible for conserving energy because my personal contribution is very small” (n=114)**

Agreement Scale Number	% of Respondents
1 (Strongly Disagree)	65%
2	11%
3	3%
4	2%
5	4%
6	3%
7 (Strongly Agree)	12%

When asked about what motivates respondents to save energy, their top two answers were saving money and protecting the environment, as shown in Table 8.

**Table 8. Motivations for Respondents to Save Energy (n=117)**

Motivating Factor	% of Respondents
Saving Money	37%
Protecting Our Environment	25%
For the Benefit of Future Generations	19%
Maintaining Health	9%
Helping California Save Energy	6%
Reducing Our Dependence on Foreign Oil	4%



Table 9 shows how respondents characterized their home.

**Table 9. Types of Home Respondents Live In (n=116)**

Home Type	% of Respondents
Single-Family Detached House	69%
Single-family Attached House	4%
Duplex	3%
Building with 2-4 Units	6%
Building with 5 or More Units	17%
Mobile Home or House Trailer	1%

Most respondents lived in a home that contained two, three, or four bedrooms, as shown in Table 10.

**Table 10. Number of Bedrooms in Respondent’s Homes (n=117)**

Number of Bedrooms	% of Respondents
1	9%
2	19%
3	43%
4	26%
5	3%
6	1%

Almost half of the respondents have lived in their homes for fewer than 10 years, and more than one-quarter have lived in their homes for fewer than five years, as shown in Table 11

**Table 11. Years Respondents Have Lived In Their Homes (n=113)**

Years Lived in Home	% of Respondents
Less than 5	29%
5 – 9	19%
10 – 14	13%
15 – 19	12%
20 – 24	13%
25 – 29	5%
30 or more	9%

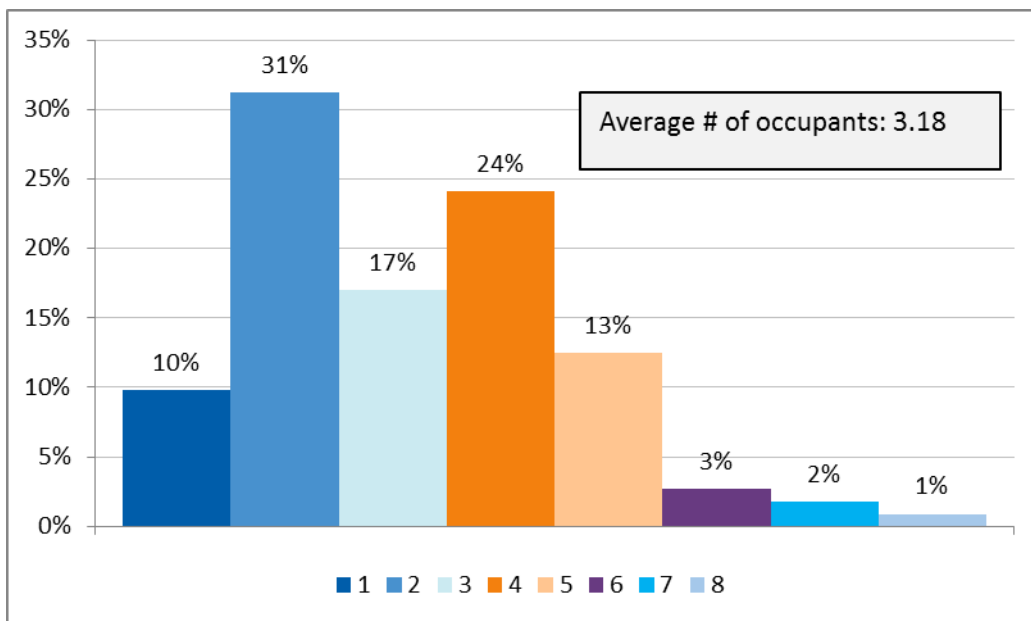
Table 12 shows the percentage of respondents whose homes were built during specific decades or date ranges.

**Table 12. Year Respondent’s Homes Were Built (n=89)**

Year Range Home Was Built	% of Respondents
Before 1950	15%
1950 – 1959	17%
1960 - 1969	15%
1970 – 1979	11%
1980 – 1989	22%
1990 – 1994	3%
1995 or later	17%

The average number of occupants in a respondent’s homes was just over three, as shown in Figure 34.

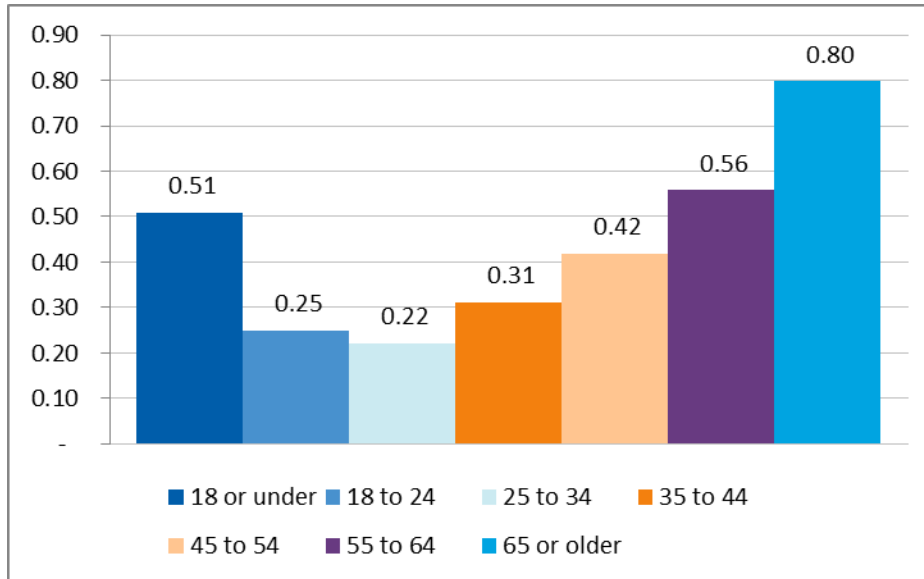
**Figure 34. Number of Occupants in Respondent’s Homes (n=112)**





As shown in Figure 35, respondents' households contained a larger proportion of older residents than of younger residents.

**Figure 35. Age Distribution of Occupants (n=120)**



Most respondents either own or are buying their homes (Table 13).

**Table 13. Respondent's Home Ownership Type (n=111)**

Home Ownership Type	% of Respondents
Own/Buying	68%
Rent/Lease	28%
Occupy Rent-Free	4%

Table 14 shows 41% of respondents remodeled their home within the past five years.

**Table 14. Respondents that Remodeled Home in Last Five Years (n=113)**

Answer	% of Respondents
Yes	41%
No	59%

The education levels reported by the respondents are shown in Table 15.

**Table 15. Respondent’s Education Attainment Level (n=106)**

Attainment Level	% of Respondents
No schooling	3%
Less than high school	7%
Some High School	6%
High School/GED	23%
Some College	6%
College Degree	46%
Graduate or Professional Degree	9%
Post-Graduate	1%

The income levels reported by of the respondents are shown in Table 16.

**Table 16. Respondent’s Income Levels (n=66)**

Income Level	% of Respondents
Less than \$20,000	39%
20 to less than \$30,000	20%
30 to less than \$40,000	9%
40 to less than \$50,000	5%
50 to less than \$60,000	6%
60 to less than \$75,000	6%
75 to less than \$100,000	6%
100 to less than \$150,000	5%
150 to less than \$200,000	3%
More than \$200,000	2%

A comparison of income levels and household size against the criteria for the CARE/Energy Savings Assistance Program (ESAP) showed that 42% of respondents may qualify for the income restricted programs. (Table 17 shows the income limits.)

**Table 17. 2010-2012 CARE/ESAP Income Guidelines**

Number of Persons in Household	Income Limits
One to Two	\$31,800
Three	\$37,400
Four	\$45,100
Five	\$52,800
Six	\$60,500
Each additional person	\$7,700



## Appendix B: Phone Survey Instrument

# CLEO Seminar Participants Survey Guide Process Evaluation (PY2010–12)

### MAPPING OF 2010-2012 QUESTIONS TO 06-08 EVALUATION RESULTS

2010-2012 Question Number	06-08 CLEO Report Figure or Table Number
A2	CLEO 2
A3-A4	xB-48
A5-A6	CLEO 4
B1-B2	CLEO 5
B3-B5	CLEO 7
B6-B10	CLEO 5
B11 – B13	xB-23 and xB-24
S1-S2	xB-37
S3	xB-38
S4	xB-40

Name \_\_\_\_\_  
 Phone No \_\_\_\_\_  
 Participant ID No. \_\_\_\_\_  
 Household Address \_\_\_\_\_  
 Start Time \_\_\_\_\_ End Time \_\_\_\_\_

This survey is to be translated into other languages prior to administration.

### Screening [Record Dispositions]

SC1. Hello may I speak with [English Name]? I'm \_\_\_\_\_ calling on behalf of Southern California Edison about a very important study on the CLEO (Community Language Efficiency Outreach) program. Do you recall attending a CLEO seminar or meeting in [date] at [place] about saving energy? The energy saving information was presented in a slide show in [language]. You brought your energy bill to this meeting and received a gift bag and handouts.

1. Yes
2. No [Thank and terminate]
98. DON'T KNOW [Thank and terminate]
99. REFUSED [Thank and terminate]

SC2. What is the name of your electric company?

1. Southern California Edison
2. LA DWP [Thank and terminate]
3. Other [Thank and terminate]
98. DON'T KNOW [Thank and terminate]
99. REFUSED [Thank and terminate]

SC3. If you have natural gas in your home, what is the name of your gas company?

1. Southern California Gas Company
2. Long Beach Gas & Oil [Thank and terminate]
3. Southwest Gas [Thank and terminate]
4. San Diego Gas & Electric [Thank and terminate]
5. We do not have natural gas
98. DON'T KNOW
99. REFUSED

## Awareness and Knowledge

A1 I will be asking a series of questions regarding the CLEO meeting you attended last year. Would you prefer to answer these questions in [language] or in English? (Administer in whichever language the respondent prefers. Note which language they prefer)

1. [Language option]
2. English

A2 Where did you hear about the CLEO meeting? [DO NOT READ, ALLOW MULTIPLE RESPONSES]

1. At a festival or event
2. Radio
3. Newspaper ad or article
4. Church or other religious organization
5. Community centers
6. Friend, neighbor, family, or work colleague
7. Television
8. Other (RECORD) \_\_\_\_\_
98. DON'T KNOW
99. REFUSED

Now I'm going to ask you a few questions about topics covered in the CLEO meeting you attended last year.

A3 At the meeting, do you recall hearing about the top 10 energy guzzlers in your home? Energy guzzlers are the appliances and other equipment that use the most energy in your home.

1. Yes
2. No
98. DON'T KNOW
99. REFUSED

A4 [If A3 = Yes] Can you give me some examples of the energy guzzlers you heard about at the meeting? [DO NOT READ, MARK ALL ANSWERS]?

1. Central Air Conditioner
2. Refrigerator
3. Ducted Evaporative Cooler
4. Clothes Dryer
5. Electric Stove
6. Pool Pump & Motor
7. Freezer
8. Portable Heater
9. Plasma TV
10. Dishwasher



- 11. Other (RECORD)\_\_\_\_\_
- 98. DON'T KNOW
- 99. REFUSED

A5 At the meeting, do you remember learning any specific tips for saving energy at home? These tips were related to lighting, heating and cooling your home, appliances, insulation, and water heating. [If yes] What were they? [If needed] Please feel free to tell us if you don't know the answer. It's fine if you don't remember, let's just move to the next question.

- 1. (RECORD RESPONSE)\_\_\_\_\_
- 98. DON'T KNOW
- 99. REFUSED

A6 Are you aware of any specific programs that Southern California Edison offers to help customers save energy and money on their utility bills? (Examples if needed: rebates for energy-efficient appliances, special rates for income qualified households, in-home energy survey)

- 1. Yes
- 2. No
- 98. DON'T KNOW
- 99. REFUSED

A7 [if A6 = Yes] Can you give me the names of those programs or describe them to me? [DO NOT READ, ALLOW MULTIPLE RESPONSES]

- 1. Home Energy Efficiency Rebate Program (e.g., pool pump, whole house fan, ENERGY STAR Refrigerator)
- 2. In-Home Energy Efficiency Survey or Home Energy Advisor
- 3. Appliance Recycling Program to recycle used refrigerators or freezers
- 4. Summer discount plan (interrupting or cycling the central air conditioner, device on air conditioner)
- 5. Energy Upgrade California (for comprehensive single family retrofit projects)
- 6. Energy Savings Assistance Program (Free energy-efficient appliances and weatherization for income qualified customers)
- 7. California Alternate Rates for Energy (CARE). This is a reduced rate programs for income qualified households.
- 8. Low-Income Home Energy Assistance Program (LIHEAP). This is an energy bill assistance program for income qualified households.
- 9. Family Electric Rate Assistance Program (FERA). This is a bill discount program.
- 10. Budget Assistant. This program will allow SCE to send customer alert messages using a customer's defined criteria concerning energy usage.
- 11. Medical Baseline Program
- 12. Other (RECORD)\_\_\_\_\_
- 98. DON'T KNOW
- 99. REFUSED

**Behavior Change**

B1. After attending the CLEO meeting, did you sign up for and receive a free in-home home energy efficiency survey?

- 1. Yes [Skip to B3]
- 2. No



98. DON'T KNOW [Skip to B3]  
 99. REFUSED [Skip to B3]
- B2. [If B1 = No] What prevented you from requesting a free home energy survey?  
 1. I plan to but I just haven't gotten around to it  
 2. I already knew what to do to save energy  
 3. I forgot about it  
 4. It was too much trouble  
 5. I didn't have enough time  
 6. Other (RECORD) \_\_\_\_\_  
 98. DON'T KNOW  
 99. REFUSED
- B3. Have you installed any energy-efficient equipment (such as efficient light bulbs or efficient appliances), since attending the CLEO seminar?  
 1. Yes  
 2. No  
 99. DON'T KNOW  
 99. REFUSED
- B4. [If B3 = Yes] What have you installed? [ALLOW MULTIPLE RESPONSES]  
 1. Lighting  
 2. Other (RECORD) \_\_\_\_\_  
 98. DON'T KNOW  
 99. REFUSED
- B5. [If B3 = Yes] Did the CLEO meeting influence your decision to install the efficient equipment?  
 1. Yes  
 2. Partially  
 3. No  
 98. DON'T KNOW  
 99. REFUSED
- B6. [If B3 = Yes] Did you receive a rebate from Southern California Edison for any of the equipment you installed?  
 1. Yes  
 2. No  
 98. DON'T KNOW  
 99. REFUSED
- B7. Since attending the CLEO meeting, have you participated in any Southern California Edison programs to help you save energy or money on your utility bill?  
 1. Yes  
 2. No [Skip to B10]  
 98. DON'T KNOW [Skip to B11]  
 99. REFUSED [Skip to B11]
- B8. What programs have you participated in? [READ LIST IN RANDOM ORDER, MARK ALL THAT APPLY]  
 1. Home Energy Efficiency Rebate program  
     i. If yes, what type of appliance? (RECORD) \_\_\_\_\_  
 2. In-Home Energy Efficiency Survey or Home Energy Advisor  
 3. Appliance Recycling Program to recycle used refrigerators or freezers



- 4. Summer discount plan (interrupting or cycling the central air conditioner)
- 5. Energy Upgrade California (for comprehensive single family retrofit projects)
- 6. Energy Savings Assistance Program (Free energy-efficient appliances and weatherization for income qualified customers)
- 7. California Alternate Rates for Energy (CARE). This is a reduced rate programs for income qualified households.
- 8. Low-Income Home Energy Assistance Program (LIHEAP). This is an energy bill assistance program for income qualified households.
- 9. Family Electric Rate Assistance Program (FERA). This is a bill discount program.
- 10. Budget Assistant. This program will allow SCE to send customer alert messages using a customer’s defined criteria.
- 11. Medical Baseline Program
- 12. Other (RECORD) \_\_\_\_\_
- 98. DON’T KNOW
- 99. REFUSED

B9. Did the CLEO meeting influence your decision to participate in these other programs?

- 1. Yes [Skip to B11]
- 2. Partially [Skip to B11]
- 3. No [Skip to B11]
- 98. DON’T KNOW [Skip to B11]
- 99. REFUSED [Skip to B11]

B10. [If B7= No] What has prevented you from participating in the energy programs that you heard about at the CLEO meeting?

- 1. Don’t need to purchase anything
- 2. Cannot afford to purchase efficient equipment
- 3. I don’t know what to purchase
- 4. I don’t understand how to get the rebate
- 5. I don’t have enough time to participate
- 6. Other (RECORD)\_\_\_\_\_
- 98. DON’T KNOW
- 100.REFUSED

B11. Did you change the way you use energy after attending the CLEO meeting?

- 1. Yes
- 2. No
- 98. DON’T KNOW
- 99. REFUSED

B12. [If B11 = Yes] How did you change the way you use energy?

- 1. (RECORD RESPONSE)\_\_\_\_\_
- 98. DON’T KNOW
- 99. REFUSED

B13. [If B11 = Yes] Did attending the CLEO meeting influence your decision to change the way you use energy?

- 1. Yes
- 2. Partially
- 3. No
- 98. DON’T KNOW
- 99. REFUSED

## Satisfaction with CLEO Seminar

Now I will ask you some questions about your experience during the CLEO meeting.

- S1. On a scale from 1 to 5, with 1 being not at all satisfied and 5 being very satisfied, how satisfied were you with: [READ LIST]
1. The meeting you attended?
  2. The way the host conducted the meeting?
  3. The clarity of the information presented?
  4. The examples the host used?
  5. The relevance of the information presented?
- S2. On a scale from 1 to 5, with 1 being "I didn't understand at all" and 5 being "I understood very well," how well did you understand what to do next to save energy after leaving the meeting?
1. (RECORD) \_\_\_\_\_
  98. DON'T KNOW
  99. REFUSED
- S3. What did you like most about the meeting [DO NOT READ, ALLOW MULTIPLE RESPONSES]?
1. Learning about saving money/reducing bills
  2. Learning about saving energy
  3. Free stuff/free lunch
  4. Raffle/lottery
  5. Chance to socialize (meet people in the community)
  6. Learning about rebates from SCE/SoCalGas
  7. Learning about income qualified programs from SCE/SoCalGas
  8. Other (RECORD) \_\_\_\_\_
  98. DON'T KNOW
  99. REFUSED
- S4. What did you not like about the meeting [DO NOT READ, ALLOW MULTIPLE RESPONSES]?
1. Other (RECORD) \_\_\_\_\_
  98. DON'T KNOW
  99. REFUSED
- S5. What suggestions do you have for improving the meeting [DO NOT READ, ALLOW MULTIPLE RESPONSES]?
1. Focus on low/no-cost energy saving tips
  2. Offer more meetings
  3. Provide better examples/more details
  4. Give away more efficient light bulbs
  5. Discuss solar energy
  6. Help people sign up for SCE/SoCalGas programs
  7. Focus more on low-income programs
  8. Other (RECORD)
  98. DON'T KNOW
  99. REFUSED

## Segmentation and Demographics



I have just few general questions for you, and then a few final questions about your household.

- D1. Have you heard of a carbon footprint? **[IF NECESSARY: A carbon footprint is the amount of gases containing carbon that are produced when you burn fuels and use electricity. This includes but is not limited to the energy consumption in your home, your transportation, your diet, and your purchases.] [DO NOT READ RESPONSES]**
1. Yes
  2. No
  3. Yes, I have heard the term “carbon footprint” but I do not know what it means
  98. DON’T KNOW
  99. REFUSE
- D2. Next, I’m going to read a list of energy-saving actions. For each action please tell me if your household has already taken the action. Did you... **[RANDOMIZE ACTIONS] [READ EACH ACTION. RECORD FOR EACH: 1=YES; 2=NO; 3=CAME WITH THE HOUSE; -98=REFUSED; -99=DON’T KNOW. DISTINGUISH BETWEEN, “1=YES, INSTALLED IT MY/OUR SELVES” AND “3=CAME WITH THE HOUSE”]**
- a. ...install programmable thermostats?
  - b. ...install ceiling fans?
  - c. ...install motion detectors for lights?
- D3. On a scale of 1 to 7, where 7 is Strongly Agree, and 1 is Strongly Disagree, please tell me how much you agree or disagree with the following two statements.
- a. I compare prices of at least a few brands before I choose one.  
**[RECORD NUMBER 1-7]**
  98. DON’T KNOW
  99. REFUSED
  - b. I do NOT feel responsible for conserving energy because my personal contribution is very small.  
**[RECORD NUMBER 1-7]**
  98. DON’T KNOW
  99. REFUSED
- D4. I’m going to read you a list of 6 reasons why people might change their daily actions to save energy. Please tell me which of these would motivate you the MOST to save energy? **[READ CHOICES] [IF RESPONDENT SAYS “DON’T KNOW,” PROBE: “if you had to choose from the following reasons which one would motivate you the most”] [RANDOMIZE]**
1. Saving money
  2. Maintaining health
  3. Protecting the environment
  4. For the benefit of future generations
  5. Reducing our dependence on foreign oil
  6. Helping California lead the way on saving energy
  98. DON’T KNOW
  99. REFUSED
- D5. Which of the following types of housing units would you say best describes your home? Is it a... **[READ CHOICES]**
1. Single-family detached house
  2. Single-family attached house

- 3. Duplex
  - 4. Building with 2-4 units
  - 5. Building with 5 or more units
  - 6. Mobile home or house trailer
  - 7. Other (specify)
  - 98. DON'T KNOW
  - 99. REFUSED
- D6. How many bedrooms do you have in your home? **[IF EFFICIENCY OR STUDIO APARTMENT, BEDROOMS=0]**  
**[RECORD NUMBER]**  
 98. DON'T KNOW  
 99. REFUSED
- D7. How many years have you lived in your home? **[ROUND TO THE NEAREST HALF YEAR; USE 0.5 FOR 6 MONTHS OR ½ YEAR]**  
**[RECORD NUMBER]**  
 98. DON'T KNOW  
 99. REFUSED
- D8. About when was your home first built?
- 1. Before 1950
  - 2. 1950 to 1959
  - 3. 1960 to 1969
  - 4. 1970 to 1977
  - 5. 1978 to 1979
  - 6. 1980 to 1989
  - 7. 1990 to 1994
  - 8. 1995 or later
  - 98. DON'T KNOW
  - 99. REFUSED
- D9. Including yourself, how many people currently live in your home year-round?  
**[RECORD NUMBER]**  
 98. DON'T KNOW  
 99. REFUSED
- D10. **[IF D9>0]** Including yourself, how many of the people currently living in your home year-round are in the following age groups? **[TOTAL SHOULD EQUAL RESPONSE FROM D9; RECORD 98 FOR Don't Know OR 99 for Refused]**
- a. Less than 18 years old **[RECORD NUMBER]**
  - b. 18 to 24 **[RECORD NUMBER]**
  - c. 25 to 34 **[RECORD NUMBER]**
  - d. 35 to 44 **[RECORD NUMBER]**
  - e. 45 to 54 **[RECORD NUMBER]**
  - f. 55 to 64 **[RECORD NUMBER]**
  - g. 65 or older **[RECORD NUMBER]**
- D11. Do you or members of your household own your home, or do you rent it?
- 1. Own/ Buying
  - 2. Rent/ Lease
  - 3. Occupy rent-free
  - 98. DON'T KNOW



99. REFUSED
- D12. Have you remodeled your home in the past 5 years?
1. Yes
  2. No
98. DON'T KNOW
99. REFUSED
- D13. What is the highest level of education you have completed? **[DO NOT READ]**
1. No schooling
  2. Less than high school
  3. Some high school
  4. High school graduate or equivalent (e.g., GED)
  5. Some college
  6. College degree
  7. Graduate or professional degree
  8. Post graduate
98. DON'T KNOW
99. REFUSED
- D14. How would you describe your race? **[DO NOT READ; RECORD UP TO 5 RESPONSES]**
1. White
  2. Black or African American
  3. American Indian or Alaska Native
  4. Asian
  5. Pacific Islander
  6. Other **[SPECIFY]**
98. DON'T KNOW
99. REFUSED
- D15. Are you Spanish, Hispanic or Latino?
1. Yes
  2. No
98. DON'T KNOW
99. REFUSED
- D16. What was your household income from all sources in 2012, before taxes? Please stop me when I reach the category that best describes your household's income. **[READ LIST; IF NECESSARY, SAY: "This information is confidential and will only be used for the purpose of characterizing study respondents."]**
1. Less than \$20,000
  2. 20 to less than \$30,000
  3. 30 to less than \$40,000
  4. 40 to less than \$50,000
  5. 50 to less than \$60,000
  6. 60 to less than \$75,000
  7. 75 to less than \$100,000
  8. 100 to less than \$150,000
  9. 150 to less than \$200,000
  10. More than \$200,000
98. DON'T KNOW
99. REFUSED
- D17. What is the primary language spoken in your home? **[DO NOT READ LIST]**
1. English
  2. Spanish

3. Mandarin
4. Cantonese
5. Tagalog
6. Korean
7. Vietnamese
8. Russian
9. Japanese
10. Other **[SPECIFY]**
98. DON'T KNOW
99. REFUSED

D18. **[RECORD GENDER, DO NOT ASK]**

1. Female
2. Male

END. Those are all the questions I have. Thank you very much for helping us!