ENERGY EFFICIENCY PROGRAMS

SoCalGas®
Retail Channel Support
Program Implementation Plan

Prepared by ICF
for SoCalGas® and ICF Use

Version 1.0
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Contents

The following information shall be uploaded to the California Public Utilities Commission (CPUC)-maintained website, the California Energy Data and Reporting System (CEDARS), in accordance with CPUC decisions and Staff guidance.

Program Overview

The following Program Overview consists of the Program Budget and Savings Implementation Narrative sections. Certain information is available for download at CEDARS as noted below.

Program Budget and Savings

SoCalGas® Retail Channel Support is a Market Support program; therefore, certain metrics are listed as not applicable as Market Support programs do not claim energy savings.

Table 1. Program Budget and Savings

Program and/or Sub-Program Name	Retail Channel Support
Program/Sub-Program ID number	To be assigned by SoCalGas
Program/Sub-Program Budget Table	Available on CEDARS
Program/Sub-Program Gross Impacts Table	N/A
Program/Sub-Program Cost Effectiveness (TRC)	N/A
Program/Sub-Program Cost Effectiveness (PAC)	N/A
Type of Program/Sub-Program Implementer (PA-delivered, third party-delivered or Partnership)	Third-party delivered
Market Sector(s) (i.e., residential, commercial, industrial, agricultural, public)	Residential customer segment
Program/Sub-program Type	Market Support
Market channel(s) (i.e., downstream, midstream, and/or upstream) and Intervention Strategies (e.g., direct install, incentive, finance, audit, technical assistance, etc.), campaign goals, and timeline.	Midstream Technical Assistance Program timeline displayed below

Table 2. Program Timeline

Phase	Deliverables	Dates
Launch preparation	Kickoff Meeting Program Implementation Plan Program Management Plan Program Marketing Plan Set up IT Infrastructure Develop Program POP Materials	Q1 2023
In-market and ramp-up	Train retail staff	Q2 2023

	Install POP in stores	
Perform program services	Deliver Program services Conduct inspections and verifications Perform ongoing store visits	Q3 2023 through Q4 2025
Program shutdown	Shutdown Plan Inform Stakeholders Resolve outstanding items Final Program Report	As determined by Shutdown Plan

Implementation Plan Narrative

Program Description

The SoCalGas® Retail Channel Support Program (the Program) is a midstream Market Support offering that will raise awareness and increase understanding of available efficient natural gas products, the benefits associated with efficient natural gas products, and the rebate programs available for efficient natural gas products. The Program will achieve its objectives through engagement with participating rebate program retailer and distributor sales associates, who will in turn educate consumers.

Program Rationale

The rationale behind the Program is to ensure that stores participating in SoCalGas retail energy efficiency programs are equipped to promote eligible equipment and rebates. Through a coordinated and structured effort that includes ongoing support for participating retailers, the Program will help retailers deliver a consistent, technically accurate message to consumers throughout the SoCalGas service territory.

Program Objectives

The objectives of the Program are to 1) help build and maintain demand for efficient natural gas products in the marketplace and 2) motivate distributors and retailers to supply efficient natural gas products. The program will increase awareness and understanding of efficient natural gas products to help retailers feel confident in stocking and selling efficient natural gas products, and to help consumers make an informed purchase decision.

Program Delivery and Customer Services

The Program involves a coordinated outreach, educational, and marketing strategy designed to promote natural gas EE measures and available rebates. The delivery strategy includes:

- **Field service visits** to each location of prominent retailers and distributors to 1) **place point of purchase (POP)** and other marketing materials within the store, 2) **train sales associates** on the features and benefits of energy efficiency and how to sell products based on these benefits, and (3) **educate customers** during interactions that occur during store visits.
- Development, production, and distribution of effective **marketing materials** tailored for use through retail and distribution channels.
- Set-up and staff trade shows, home shows and other such **events** to promote consumer awareness of SoCalGas rebate programs.
- Targeted implementation that places **extra emphasis on HTR and DAC** locations.

Program Design and Best Practices

The Program goal is to provide education and marketing support to retailers and distributors who participate in one or more SoCalGas retail rebate program. Program staff will make frequent, regular visits to retail locations to ensure consistent messaging and active participation by retailer staff. Several best practices are used in promoting rebate programs in a retail environment as described below in Table 3.

Table 3. Program Best Practices

Market Barrier	Strategy	Tactics	Best Practice
Customers lack EE understanding	Provide consumer education about the benefits of EE	• Develop and place POP in participating retailer locations	• Leverage QR Code Technology to allow customers ease of access to rebate applications and additional information • Provide in-language POP for stores located in areas with large populations of non-English speaking customers
Retailers lack EE understanding	Provide retailer education	• Provide technical and sales training to sales staff	• Offer training on an ongoing basis due to staff turnover
Customers not factoring EE in buying decisions while in store	Provide consumer education about EE cost savings	• Display POP signage with eligible products	• Include information about potential operational cost reductions on POP • Incorporate the ENEGY STAR® Mark on products that are qualified, providing third-party endorsement from a brand recognized by more than 90 percent of American consumers[1]
Low awareness of rebate programs	Provide consumer education about SoCalGas rebate programs	• Display POP signage with eligible products	• Include information about rebate amounts on POP and QR codes to program applications

Metrics

Key Performance Indicators (KPIs) for the program provide the primary means for assessing the Program's performance on an ongoing basis. Tracking and reporting of KPIs is completed on a monthly, quarterly, or annual basis depending on the specific KPI being measured. In addition to the specific metrics related to in-store activity described below, the Program will track metrics that

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[1] National Awareness of ENERGY STAR, 2019.
https://www.energystar.gov/sites/default/files/asset/document/National_Awareness_of_ENERGY_STAR_2019_DNVGL_050120_508.pdf

align with proposed metrics for the Market Support sector as recommended in the Market Support Metrics Working Group Final Report[2].

KPI	Metric Type	Description
Number of store visits	Count	Visits by field staff to participating distributor and retailer locations to train staff, stock marketing materials, and install/update POP
Number of Trade Shows/Events	Count	Provide direct interaction with consumers at events where SoCalGas is promoting rebate offerings
Number of sales associate interactions	Count	Direct one-on-one training and education for sales associates at participating distributor and retailer locations
Number of training sessions	Count	Group training sessions for sales associates at participating distributor and retailer locations
Percent increase: Demand	Count and percentage	Number and % increase/decrease of inquiries and/or requests for information on EE products
Percent increase: Consumer Engagement	Count and percentage	Number and % increase/decrease of customers receiving information, education, or outreach on EE products
Percent increase: Supply	Percentage	AKAB (Awareness, Knowledge, Attitude, Behavior) survey to participating retailers around capability and desire to supply EE products • % of market actors aware of energy efficient products and/or services that can be supplied to customers • % of market actors knowledgeable of energy efficient products and/or services that can be supplied to customers • % of market actors that are interested in supplying energy efficient products and/or services to customers • % of market actors that have supplied energy efficient products and/or services to customers

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[2] Report and Recommendations to the California Public Utilities Commission and the Energy Efficiency Program Administrators, CAEECC-Hosted Market Support Metrics Working Group, October 2021

To-Code Savings Claims

Not applicable to Market Support programs.

Pilots

Pilots are not applicable to the Retail Channel Support Program.

Workforce Education and Training

While the program will provide EE training to personnel employed by participating retailers, the program does not maintain stated Workforce Education and Training (WE&T) goals or plans.

Workforce Standards

Not applicable to Market Support programs.

Disadvantaged Worker Plan

Not applicable to Market Support programs.

Additional Information

No additional information is applicable or required.

Supporting Documents

Program Manual and Program Rules

Eligible Measures:

Eligible measures promoted through the Program include measures available through SoCalGas core residential rebate programs that are not otherwise included in the Statewide Plug Load & Appliance Program.

Customer Eligibility Requirements:

The Program is focused on promoting efficient residential appliances and available rebate through retailer and distributor channels but does not have specific eligibility requirements. Specific eligibility for rebate programs offered by other parties is managed directly by those programs.

Retailer and Distributor Eligibility Requirements:

Eligible retailer and distributor locations are located within SoCalGas service territory and sell targeted appliances for use in residential applications. Participating retailers agree to display SoCalGas branded POP and allow Program personnel access to the store to update and refresh POP as required.

Additional Services:

No additional services provided beyond those described within Implementation Plan.

Audits:

Not applicable for Retail Channel Support.

Program Quality Assurance Provisions:

There are two levels of quality assurance used in the implementation of the Program's market support services:

1. Field personnel capture details related to store visits in the smart phone application. During the store visit, staff select the store visited and the product information relevant to the visit. The list of stores and eligible product types is maintained in a central database by the Program Manager. Additionally, field personnel take geotagged pictures directly in the app validating that the actual store visit was conducted.
2. The Program Manager conducts a monthly ride along with field personnel to view in store interactions first-hand and provide any feedback or corrective action required.

Other Program Metrics:

Program metrics related to store visits will be captured by field personnel using the smart phone application and stored in the program database. Additional market support metrics will be tracked through retailer surveys conducted throughout the program terms to assess overall Awareness, Knowledge, Attitudes and Behaviors towards energy efficiency.

Program Theory and Program Logic Model

Program Theory and Logic Models should visually explain underlying program theory supporting the sub-program intervention approach, referring as needed to the relevant literature (e.g., past evaluations, best practices documents, journal articles, books, etc.).
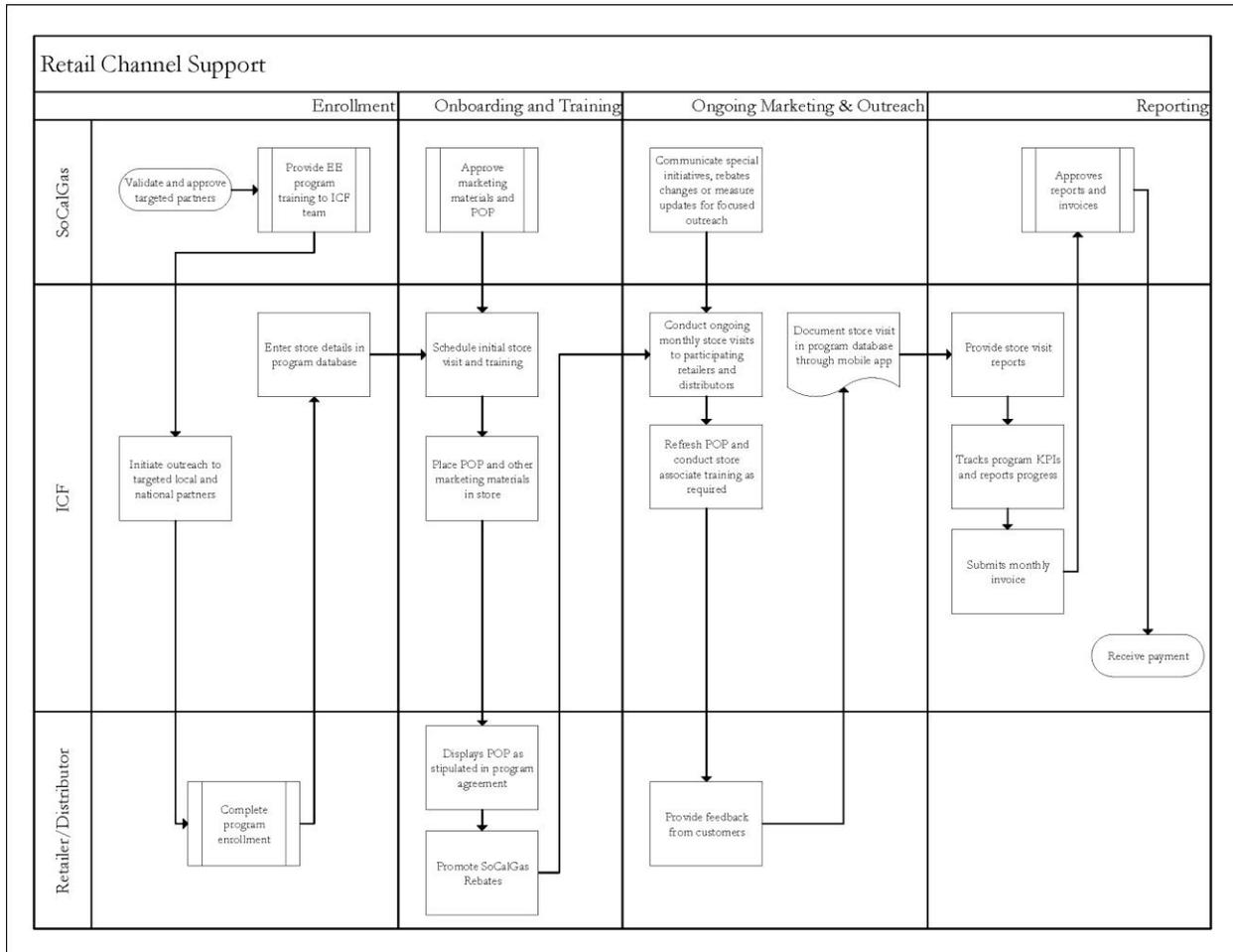
BARRIERS & RISKS	Customers lack EE understanding	Retailers lack EE understanding	Customers are not purchasing EE	Disconnect between purchase and EE	Low awareness of rebate programs
INPUTS & RESOURCES	Retailer management		Retailer personnel		
ACTIVITIES	Make EE visible through effective POP displays	Promote ENERGY STAR® and cost savings	Retailer technical and financial education	Direct in-store interaction	
OUTPUTS	Monthly store visit reports	Post-training survey of store personnel	Quarterly satisfaction survey		
SHORT-TERM OUTCOMES	Increased customer awareness of EE appliances and available rebates		Increased awareness of EE appliances and rebates by retailer staff		
MID-TERM OUTCOMES	More participation in rebate programs		Increased demand for and sales of EE appliances		
LONG-TERM OUTCOMES	Increased prominence of EE products in store				

Process Flow Chart

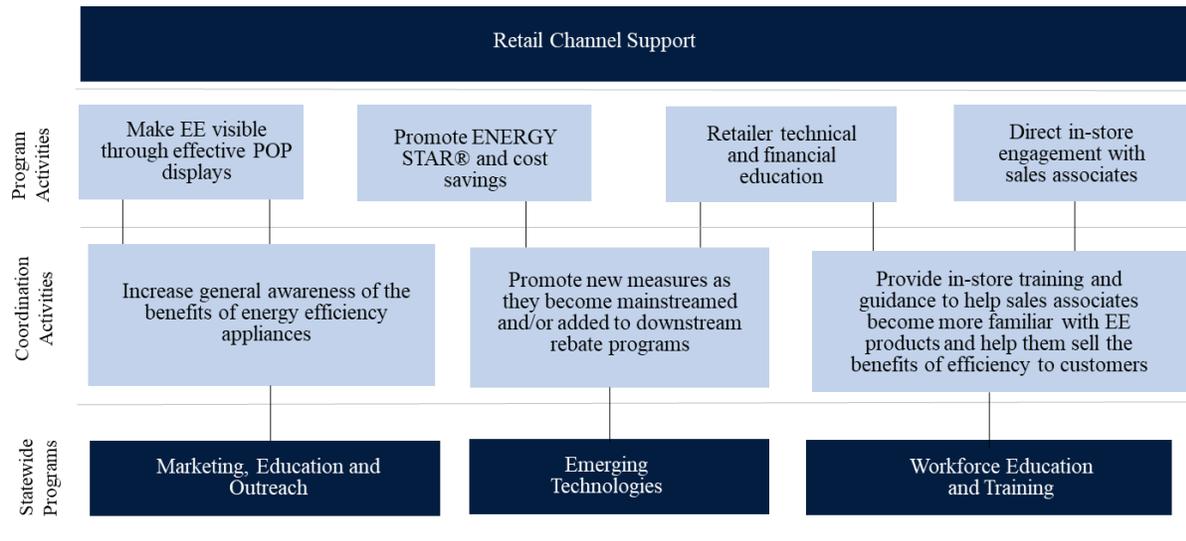## Incentive Tables, Workpapers, and Software Tools

Not applicable to Market Support programs.

Quantitative Program Targets

Program Targets	2023	2024	2025	Total
Store Visits	3,905	8,987	7,643	20,535
Trade Shows/Events	5	10	10	25
Interactions with sales associates	2,700	3,000	2,700	8,400
Training sessions	50	75	50	175

Diagram of Program

Retail Channel Support

Program Activities

Make EE visible through effective POP displays	Promote ENERGY STAR® and cost savings	Retailer technical and financial education	Direct in-store engagement with sales associates

Coordination Activities

Increase general awareness of the benefits of energy efficiency appliances	Promote new measures as they become mainstreamed and/or added to downstream rebate programs	Provide in-store training and guidance to help sales associates become more familiar with EE products and help them sell the benefits of efficiency to customers

Statewide Programs

Marketing, Education and Outreach	Emerging Technologies	Workforce Education and Training

Evaluation, Measurement, and Verification (EM&V)

Program personnel use a smart phone-based application to document and track all activities conducted within the store. The data collected during in-store visits is stored within the app and used for monthly narrative reporting.

Normalized Metered Energy Consumption (NMEC)

Not applicable to Market Support programs.