

Southern California Edison



Implementation Plan

Synergy Companies Multifamily Residential Direct Install

First Filing Date: 12/12/2024

Revision Filing Date: mm/dd/yyyy

Table of Contents

1.	Program Budget and Savings Information.....	3
1.	Program and/or Sub-Program Name	3
2.	Program and/or Sub-Program ID Number	3
3.	Program and/or Sub-Program Budget Table	3
4.	Program and/or Sub-Program Gross Impacts Table.....	3
5.	Program and/or Sub-Program Cost-Effectiveness (TRC)	3
6.	Program and/or Sub-Program Cost-Effectiveness (PAC)	4
7.	Type of Program and/or Sub-Program Implementer.....	4
8.	Market Sector	4
9.	Program and/or Sub-Program Type.....	4
10.	Market Channels and Intervention Strategies:	5
2.	Implementation Plan Narrative	6
1.	Program Description.....	6
2.	Program Delivery and Customer Services	7
3.	Program Design and Best Practices.....	11
4.	Innovation.....	14
5.	Metrics.....	15
6.	For Programs Claiming To-Code Savings	17
7.	Pilots	17
8.	Workforce Education & Training (WE&T)	17
9.	Workforce Standards	17
10.	Disadvantaged Worker Plan:	19
11.	Additional Information	19
3.	Supporting Documents	20
1.	Program Manuals and Program Rules.....	20
2.	Program Theory and Program Logic Model	21
3.	Process Flow Chart.....	23
4.	Incentive Tables, Workpapers, Software Tools	24
5.	Quantitative Program Targets.....	25
6.	Diagram of Program	25
7.	Evaluation, Measurement, and Verification (EM&V):	26
8.	Normalized Metered Energy Consumption (NMEC):	26
	APPENDIX. List of Acronyms and Abbreviations.....	27

1. Program Budget and Savings Information

1. Program and/or Sub-Program Name

Multifamily Residential Direct Install

2. Program and/or Sub-Program ID Number

SCE_3P_2024R_MF_001

3. Program and/or Sub-Program Budget Table

Costs	2025	2026	2027	2028
Administration	\$500,000	\$500,000	\$500,000	\$500,000
Marketing/Outreach	\$300,000	\$300,000	\$300,000	\$300,000
Incentive/Rebate	\$3,200,000	\$3,200,000	\$3,200,000	\$3,200,000
Direct Implementation	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000
Total	\$5,000,000	\$5,000,000	\$5,000,000	\$5,000,000

4. Program and/or Sub-Program Gross Impacts Table

Program Year	TSB	Net kWh	Net kW	Net Therms
2025	6,031,943	4,649,042	3,128	42,108
2026	6,129,357	4,506,090	3,031	42,175
2027	6,310,447	4,425,753	2,984	42,479
2028	6,407,916	4,410,736	3,032	43,118
Total	24,879,663	17,991,621	12,175	126,762

5. Program and/or Sub-Program Cost-Effectiveness (TRC)

Program Year	TRC
2025	1.00
2026	1.01
2027	1.03
2028	1.05
Cumulative TRC	1.02

6. **Program and/or Sub-Program Cost-Effectiveness (PAC)**

Program Year	PAC
2025	1.24
2026	1.26
2027	1.29
2028	1.31
Cumulative TRC	1.27

7. **Type of Program and/or Sub-Program Implementer**

Program Implementer	
PA-delivered	<input type="checkbox"/>
Third Party-Delivered	<input checked="" type="checkbox"/>
Partnership	<input type="checkbox"/>

8. **Market Sector**

SCE Business Plan Sector	Yes
Residential*	<input checked="" type="checkbox"/>
Commercial	<input type="checkbox"/>
Industrial	<input type="checkbox"/>
Agricultural	<input type="checkbox"/>
Public	<input type="checkbox"/>
Cross-Cutting	<input type="checkbox"/>

*The program serves only the Residential Multifamily sector

9. **Program and/or Sub-Program Type**

Program Type	
Resource	<input checked="" type="checkbox"/>
Non-Resource	<input type="checkbox"/>

10. **Market Channels and Intervention Strategies:**

Market Channels	
Upstream	<input type="checkbox"/>
Midstream	<input type="checkbox"/>
Downstream	<input checked="" type="checkbox"/>
Intervention Strategies	
Direct Install	<input checked="" type="checkbox"/>
Incentive	<input type="checkbox"/>
Finance	<input type="checkbox"/>
Audit	<input type="checkbox"/>
Technical Assistance	<input type="checkbox"/>
Other	<input type="checkbox"/>

11. **Campaign Goals and Timeline:**

Not applicable as campaign goals have not yet been established for this program. The Implementation Plan will be updated at a later time with this information when it becomes available.

2. Implementation Plan Narrative

1. Program Description

- a. **Program Description:** The Multifamily Residential Direct Install (MFRDI) Program provides the direct installation of comprehensive energy efficiency measures to Residential Multifamily customers and common areas at no-cost, targeting specific geographic areas to alleviate energy-hardship, electric system constraints, and to assist lower to medium income population not eligible for income assistance programs. The program is designed to enhance energy efficiency knowledge and program participation of the Multifamily market segment to motivate them to undertake deeper energy efficiency activities and retrofits. For the purposes of this program's implementation, "Multifamily" is defined as a housing classification where multiple separate housing units for residential inhabitants are contained within one building or several buildings within one complex or residential building that houses more than one family at a time. Apartments, condos, townhouses, duplexes, and quadruplexes are examples of multifamily housing options.
- b. **Program Rationale:** Cost-effectiveness is achieved by installing a mix of energy efficiency technologies that yield a high Total System Benefit (TSB) and Total Resource Cost (TRC) ratio that is supported by CPUC approved Measure Packages located on California's Electronic Technical Reference Manual (eTRM). Clean energy is achieved primarily through the greenhouse gas emission reduction from the energy efficiency technologies installed. In addition to energy efficiency, the program promotes Integrated Demand Side Management (IDSMD) through the installation of demand response ready smart thermostats that are QR coded with instructions to enroll in SCE's Smart Energy Program.

The program has a building electrification component. The program tries to cover all costs through direct install, however, when the costs of electrification exceed the direct install incentive, the customer is introduced to different methods to help bridge the cost gap and cover the balance. The Home Electrification and Appliance Rebates (HEEHRA) is an Inflation Reduction Act (IRA) source of electrification rebates to bridge the cost gap. The CEC is currently distributing the funds through TECH Clean California. In accordance with the Company's DSM E-PPICs No. 084.0 – Inflation Reduction Act (IRA) Memo, the Implementer manages all aspects of the energy efficiency project regarding equipment selection, purchasing, and installation of the equipment.

- c. **Program Objectives:** This program plans to concentrate its efforts on deemed fuel substitution measures (not custom) targeting large multifamily customers by Climate Zone (HVAC type) with a whole building approach for cost-effectiveness. Secondary or sub-objectives are to assess all other measure offerings that might meet the customer's needs at the site as well. Listed below are the guiding principles to achieve the program objectives:
 - (a) Maintain a cost-effective program, consistent with the Agreement.
 - (b) Promote SCE's Demand Response Smart Energy Program.

- (c) Coordinate with and integrate other Investor-Owned Utility (IOU), Regional Energy Network (REN), and water agency programs.
 - (d) Collect, store, and submit clean installation data that aspires to 100% accuracy, along with supporting documentation that provides proof of installation, including secure and tamper-proof geotagged time stamped photos, as well as proof of permit closure, where applicable.
- 1
- (e) In accordance with Decision 21-06-015, target customers with the following characteristics: Disadvantaged Communities (DAC), Hard-to-Reach (HTR), Rural, and Climate Zones (9, 10, 13, 14, and 15).

2. **Program Delivery and Customer Services**

- a. **Customer Definition:** A customer is defined as an SCE residential ratepayer residing in a multifamily building type. A multifamily building type is defined as a residential building with more than one dwelling unit with a valid SCE residential meter type. There are no income requirements to participate in the program.
- b. **Program Strategies/Tactics:** The Implementer subscribes to Multifamily databases to create a marketing prospect list. The prospect list contains the Multifamily site contact phone number, email address, physical address, dwelling unit square footage, and the dwelling unit HVAC type. These properties are geo plotted on a map using mapping software, then shared with the Implementer's Energy Specialists to perform intelligent outreach services.

The Multifamily properties receive email drip campaigns and mailers from the Implementer that promote the program's services and direct them to the program's web page for program information and the opportunity to request an appointment with the Implementer.

To reach Multifamily owners and operators in a meaningful and impactful way that will lead to Program participation requires connecting the decision maker with an Energy Specialist. The Energy Specialist uses the Multifamily prospect list to contact the Multifamily site to schedule appointments for in-person visits or virtual meetings. Multifamily sites that are unresponsive to phone calls and emails receive an in-person visit from the Energy Specialist.

Customers are enrolled in the program when they provide written consent to receive program services. For some Multifamily properties, the Implementer completes a vendor application that is pre-approved by the Multifamily property prior to implementation of program services. Once consent has been obtained, the Implementer works with the on-site maintenance staff to prepare the site for services, which typically includes posting door notices on each unit 48 hours before work begins. For the residents residing within the complex, it is much like a routine maintenance their unit would receive over the course of their rental period.

¹ Decision (D.) 18-10-008 and SCEs E-PPICs No. 85.1 Permitting and Workforce Standards Compliance Requirements published on 10/31/2024, which includes affidavits and E-PPICs 80.0 Downstream DI (Direct Install) Defined.

To achieve a successful working relationship, as well as consistent, quality installations, the Implementer first performs energy audit services and measure installation on a small scale to the Multifamily owner/operator's satisfaction, then expands the effort on a larger scale. Performing the energy audit begins with collaboration with the on-site maintenance staff to identify one dwelling unit to perform direct installation services. During the energy audit the Climate Zone and HVAC type (direct expansion gas furnace or heat pump) are identified to determine the measures that will be installed in the dwelling unit. The Implementer then executes what the Multifamily owner/operator requests by installing the desired program measures in the one dwelling unit.

The on-site maintenance staff observe the work performed and can make suggestions and special requests for how they would like the work to be performed. For example, a new Smart Thermostat may not have the same footprint as the existing thermostat, which may expose paint of a different color. The on-site staff will recognize this during the one dwelling unit installation and decide how to proceed with this scenario. Once the measure mix and installation process has been ratified between the Multifamily property and the Implementer, a plan is put in place to systematically service all dwelling units at the Multifamily site.

Customers with large Multifamily portfolios receive progress updates and reports for their Multifamily sites at a regular cadence. Meetings scheduled on a regular cadence are also arranged.

As the partnership progresses and the level of trust increases, Multifamily properties may request building audits and sales consultations for services outside of the scope of the program's direct install measure offering which may include appliance retrofits, advanced lighting retrofits, building electrification, and EV charging stations. The Implementer's staff of Energy Specialists, electricians, and plumbers are ready and able to leverage other statewide IOU and REN offerings to install these technologies.

Coordination with Other IOU and REN Offerings

During the initial Multifamily property assessment, the Implementer assesses all other feasible IOU and REN measure offerings. The program offerings and other IOU and REN offerings are installed by the Implementer during the same installation visit. This reduces carbon emissions, increases customer satisfaction, and efficiently delivers multiple programs with one customer touch. The installation of building electrification and advanced energy efficiency offerings occur on a different schedule due to potential permitting, utility shutoffs, and lengthier installation times.

Following the conclusion of the Multifamily installation, the Implementer accurately reports the measures installed to SCE, other IOUs, and RENs, where applicable. How accurate reporting to the various stakeholders takes place is covered in more depth in the program manual.

There are aspects of the REN offerings that have not been developed. When these aspects are fully developed, the implementation plan will be updated to include these as well the accompanying strategy and method.

Double-Dipping Prevention Plan

Prior to conducting installation or other program services for a customer, Synergy performs a Duplicate Measure Request Inquiry (DMRI) of its program database to

determine what measures and services the customer is eligible for. Additionally, at the time of invoicing, the same DMRI is conducted as an additional control to prevent payment requests for a measure that has been installed previously by Synergy.

The double-dipping prevention plan will be covered in more detail in the program manual. When the program manual is completed, relevant content to the implementation plan will be included as a program implementation update.

Coordination of Building Electrification and Advanced Energy Efficiency

The coordination of building electrification and advanced energy efficiency projects begins with the Implementer preparing a quote for the customer based on the requested services which includes all available statewide rebates and incentives. The customer reviews the quote and elects to move forward or not by signing an agreement. If the quote is accepted, the necessary materials are procured, and the Implementer's tradesmen are assigned to perform the work. The project is then scheduled with the customer.

When the project is completed, the customer receives a walkthrough of what was completed and signs off on the work being installed to their satisfaction. The customer is then invoiced for the work performed and pays according to the terms outlined in the agreement. See Figure 1 below for an illustration of the coordination process.

Figure 1



HTR and DAC Program Strategy

The program's strategy to deliver energy savings and/or energy efficiency solutions to HTR customers and DACs has three key components: finding, surveying, and reporting. The strategy begins with finding potential HTR and DAC program participants. To find participants, the Implementer's Energy Specialists are equipped with iPads loaded with geo mapping tools, including CalEnviroScreen SB 535 Disadvantaged Community overlays hosted on Google Maps for Business.

The next phase of the strategy is to survey program participants to determine their HTR status. Program participants are surveyed at the time of installation to define their primary language, income, housing type, and home ownership criteria.

Accurately capturing and reporting HTR data will help the program meet or exceed its energy savings goals. The HTR survey results and DAC participant data are reported to SCE with invoicing and reporting.

- c. **Market Channel:** Downstream Deemed Direct Install (DnDeemDI)
- d. **Targeted Market/Customer Group:** Large and small Multifamily common areas and dwelling units. The program also targets Energy Savings Assistance (ESA) ineligible populations, high energy users, Disadvantaged Communities (DAC), and Hard-to-Reach customers. ESA eligible customers are referred to the Multifamily ESA program administrator for follow-up and coordination of ESA program services.

3. Program Design and Best Practices

The program design requires the Implementer to deliver to SCE both weekly and monthly progress report containing the information set forth in Exhibit C and any other documents as may be reasonably requested by SCE ("Progress Report"). In addition, Implementer shall advise SCE, as soon as reasonably practicable, of any problems or issues of which Implementer is aware which could materially impact its ability to achieve each Key Performance Indicator by the applicable deadline.

In accordance with Section 4.07, the following information is required to be provided from Implementer to SCE on a **weekly** basis:

1. Pipeline Data:

- Customer name
- Customer Address
- Customer Service Account
- Measure to be installed/description
- Recruitment Stage (e.g. Recruit, Under Negotiation, Signed Contract, Installation Date)
- Expected Completion Date
- Estimated Savings

In accordance with Section 4.07, the following information is required to be provided from Implementer to SCE on a **monthly** basis:

1. Marketing Strategy:

- Completed and planned activities to obtain customer program enrollments
- Marketing Medium: email, mail, telemarketing, text, door to door, digital or social media, website, etc.
- Dates for marketing events/launches
- Measures offered by customer segment
- Reported success from marketing events/launches (e.g. number of customers interested, number of customers that shifted from interest into pipeline, etc.)

2. Customer Satisfaction Survey responses based on Project submissions, or if no Project submissions an alternatively agreed to deliverable to assess customer satisfaction with program delivery:

- Net Promoter Score – on a scale of 0-10 how likely is the Customer to recommend your program
- Timeliness – on a scale of 1-5 how responsive is the Program to Customer inquiries
- Quality of Service – on a scale of 1-5 how was the quality of service received by the Customer
- Churn Rate- percentage of Customers who participated in the program relative to the Customers who said they would participate in the Program

3. Rolling forecast for next three (3) Delivery Period Months including:

- Expected TSB that Implementer anticipates will be delivered in each of the next three (3) Delivery Period Months
- Projects in the pipeline (not yet in iEnergy)
- Projects in process (projects in iEnergy forms 1-10)
- Projects Installed (paid)

4. Risk Management and Avoidance of Double Dipping

- Identification of risks associated with Program launch and/or delivery that impact meeting savings goals identified in the contract/program performance
- Likelihood of risk occurrence
- Identification of mitigation strategies to minimize adverse impacts from identified risks
- Documentation demonstrating, to SCE's reasonable satisfaction, that none of the Measures installed and claimed by Implementer as part of the Program during the prior calendar quarter were used, submitted, claimed, or provided rebates, discounts, incentives or services to a Customer pursuant to any other CPUC-directed or CPUC-

directed energy efficiency program, including, but not limited to any program administered by a Regional Energy Network (REN).

The program design addresses the most common multifamily sector market barriers with specific program strategies. See Table 3 below.

Table 3 Multifamily Sector Market Barriers and Program Strategies		
#	Sector Barriers/ Challenges	Program Strategies to Address Barriers
1	Participants in the Multifamily Sector are Fragmented and Diverse, Creating Challenges in Aligning Drivers for Increased Energy Efficiency Adoption	<p>The program targets Multifamily owners and operators through intelligent outreach with program Multifamily Energy Specialists.</p> <p>The program offers cost-effective direct install measures that open the door for an energy efficiency partnership with the Implementer. The energy efficiency partnership blossoms into a long-term energy efficiency strategic partnership that includes advanced energy efficiency and building electrification investments on the part of the Multifamily owners and operators.</p> <p>The program offers complimentary ASHRAE Level 1 Audits with sales consultations that follow direct install measure installations. The program also leverages any Multifamily audit programs and services offered by SCE, other IOUs, and RENs.</p>
2	Hassle and Search Cost	The program is the single point of contact (SPOC) and guide for Multifamily property decision makers. The Implementer's program management team coordinates the implementation of SCE, other IOU, and REN Multifamily program offerings reducing the hassle and search costs.
3	Access to Investment Capital and Sufficient Return on Investment	Multifamily advanced energy efficiency improvements and building electrification can be financed using CHEEF, Green Sky, or REEL financing. The Implementer stacks building electrification incentives with TECH Clean California. The Implementer reserves funding from TECH Clean California when a Multifamily property commits to a building electrification project. The amount reserved plus the program's building electrification incentives combine to reduce the customer's out-of-pocket costs to decarbonize. At the completion of the project the Implementer provides TECH Clean California and SCE the required documentation to collect the incentives and the out-of-pocket cost from the Multifamily property.
4	Split Incentives for Multifamily Dwelling Unit Energy Efficiency	<p>Educate and show how the program not only reduces dwelling unit energy consumption, but improves Multifamily asset value, extends the life of the equipment serving dwelling units, and brings additional revenue from increased lease rates and property values.</p> <p>Use the top-down approach beginning with corporate and facility managers to get buy-in and support to overcome the split-incentive barrier.</p>
5	Performance Uncertainty of Energy Efficiency benefits	The Implementer performs quality measure installation training and employs quality installation Field Managers that ensure program

Table 3 Multifamily Sector Market Barriers and Program Strategies		
#	Sector Barriers/ Challenges	Program Strategies to Address Barriers
		<p>measures are installed to the customer's satisfaction and provide safe, clean, reliable energy savings.</p> <p>Multifamily owners and operators receive a list of Multifamily property references they can contact to find out the energy efficiency benefits they received.</p>

4. Innovation

Table 4 – Program Innovations		
Innovative Elements	Description	How Higher Program Performance is Achieved
Advancing a Technology – Synergy Tech System® v.2.0 with Kaizen & Six-Sigma Process Engineering	<p>Synergy Tech System® 2.0 contains all the features of Synergy Tech System® v.1.0 and Fluix forms baked into one platform. All the Measure Package field data collection requirements, geotagged timestamped photos, and measure quantities are recorded in one place. The data is extracted from the platform and with automation, translated to match SCE's iEnergy Project Bulk Upload (PBU) template.</p> <p>Kaizen and Six-Sigma are applied to the engineering of the data reporting process. Synergy Tech System® is the tool, and the engineered process is what maximizes the tool and drives the program toward zero-defects in the delivery. The program technician, data entry staff, and invoicing and reporting staff have written instructions to implement the process. Feedback is given from the process players and the process is improved over time.</p>	<p>The technological advancement results in higher program performance by increasing the efficiency of the technician, reducing the number of invoicing errors, and improving the program management experience for SCE and the Implementer.</p> <p>With fewer digital platforms and forms to fill out, the technician can dedicate more time to measure installations and appointment fulfillment. With reduced errors, invoices are approved more quickly, and energy savings are claimed without delay.</p>
Advancing a Technology – Geo-Mapping Multifamily Sites	SCE Multifamily sites are geo-mapped with a supporting backend database. Critical marketing data points are part of each multifamily site's profile that is warehoused in a database. These data points include the number of multifamily, HVAC type, service data, work performed, etc.	Geo-mapping the multifamily sites provides a helpful visual tool to see the concentration of multifamily sites throughout SCE's service territory. This tool enables the Implementer to target them efficiently and

Table 4 – Program Innovations		
Innovative Elements	Description	How Higher Program Performance is Achieved
		thoroughly. Site visits by the Implementer uncover additional data points that can be added to the supporting backend database.
Marketing Strategy – Professional Grade Videos Demonstrating Energy Efficiency	The Implementer’s marketing department produces professional grade videos that demonstrate the energy efficiency measure installation process and benefits.	The videos increase the uptake of cost-effective program measures that may not have been understood.
Delivery Approach – Clean Energy Pathway, Water Agency Leveraging, Virtual Power Plant, ESA Enrollment Driver	<p>The delivery approach begins with clean energy in mind, unlike direct installation only energy efficiency programs of the past. Along the way, the delivery approach is expandable to include water energy nexus opportunities with water agencies that overlap SCE’s service territory.</p> <p>MFRDI is a potential platform for constructing the demand response virtual powerplant founded upon the quality installation of smart thermostats and Smart Energy Program demand response program enrollments.</p> <p>The delivery approach also includes ESA Multifamily enrollment by an Implementer certified ESA associate.</p>	These comprehensive and diverse offerings all advance energy efficiency by offering something for everyone, opening Multifamily opportunities that would not have otherwise been opened as a direct install energy efficiency only program.

5. Metrics

KPI	Description	Measurement	KPI Source	Reporting Frequency	Purpose of KPI
Energy Savings (kWh, kW, therms)	A comparison of net lifecycle energy savings achieved vs. net lifecycle energy savings required under the Agreement	Based on numeric value of the total net lifecycle energy savings achieved	In accordance with Article 5	In accordance with Article 5	Track progress towards achieving annual program savings goals

KPI	Description	Measurement	KPI Source	Reporting Frequency	Purpose of KPI
Project Pipeline Target (kWh, kW, therms)	A comparison of net life cycle energy savings associated with future project pipeline in relation to the net life cycle energy savings required under Agreement	Numeric value of the total net lifecycle energy savings tracked in the program pipeline	Progress Report	In accordance with Section 4.07	Track progress towards achieving overall program savings goals
TSB (Dollars)	TSB Achieved	Dollars			
Schedule Adherence	Expected TSB vs. Ex Ante TSB; Expected TRC Ratio vs. Ex Ante Annual TRC Ratio	Expected performance vs. actual performance	In accordance with Article 5	In accordance with Article 5	Track progress towards achieving overall program savings goals
Cost Management (TRC ratio) (Levelized cost)	[Incentive/non-incentive] spend based on paid [incentive/non-incentive] spend vs forecasted [incentive/non-incentive] spend				
Customer Satisfaction Rating	Measurement of Implementer's	Report of overall customer	In accordance with	In accordance with	Reflects ability to deliver
	ability to respond to customer needs, number of complaints, resolution of complaints, flexibility, reporting accuracy and timeliness	satisfaction rating	Section 9.05(f)	Section 9.05(f)	Program at a high level of customer satisfaction
Safety Ratings	Maintain ISNetworkd (ISN) grade of B or better	ISN grade	ISNetworkd	Annually	Validate Adherence to maintaining a culture of workplace safety

KPI	Description	Measurement	KPI Source	Reporting Frequency	Purpose of KPI
Diverse Business Enterprises Spend	To date Diverse Business Enterprise spend as percent of total Program spend.	Total inception-to- date Diverse Business Enterprise spend divided by the total invoiced amount	As defined in Section 4.05	In accordance with Section 4.05(c)	Validates that the Diverse Business Enterprise commitment is being met

6. **For Programs Claiming To-Code Savings**

Not applicable; the program does not claim to-code savings.

7. **Pilots**

Not applicable; the program does not have pilots planned.

8. **Workforce Education & Training (WE&T)**²

The program's Implementer actively seeks partnerships with entities that perform job placement. The Implementer's Human Resource Director enrolls in job fairs and attends statewide joint IOU supplier diversity symposiums. The Implementer does not require placement experience for any new partners in the workforce, nor does it require first source hiring before looking more broadly.

The Implementer's Outreach Consultants become certified ESA Energy Specialists and receive instruction virtually or in-person at SCE Energy Education Centers. The ESA certification allows the Implementer's Outreach Consultants to refer and/or enroll customers in Income Qualified Programs.

9. **Workforce Standards**³

To fulfill the entire Scope of Work for the program, the Implementer carries a B - General Building Contractor License, C-10 Electrical Contractor License, and a C-20 HVAC Contractor License. The Implementer also ensures there is always at least one North American Technician Excellence (NATE) certified Supervisor on staff.

² D.18-05-041, Page 20-21 and Ordering Paragraph 7.

³ D.18-10-008, Ordering Paragraph 1-2 and Attachment B, Section A-B, Page B-1.

Table 9 – Workforce Standards	
Relevant Workforce Standards, Skills, Certifications to Ensure Quality Installations and Measure Persistence:	<p>Fulfilling the entire scope of work of the program requires the workforce to carry a general building contractor's license (B), insulation (C2), electrical (C10), HVAC (C20), plumbing (C36), and potentially solar (C46) if solar thermal is added to the program in the future. It is recommended that there be a North American Technician Excellence (NATE) certified supervisor on staff. The Implementer holds these licenses, certifications, and more under CSLB license # 835016. The Implementer has North American Technician Excellence (NATE) certified supervisors.</p>
Quality Workforce Assurance:	<p>Quality measure installation training and quality installation Field Managers ensure measures are installed to the customer's satisfaction and provide safe, clean, reliable energy savings. To ensure high production quality and customer satisfaction, the Implementer employs full-time Quality Production Managers (QPMs) that physically inspect the work completed on the program. The QPMs also actively resolve customer questions and concerns regarding workmanship and warranty. The QPMs ensure that measures are installed properly and perform as they should while doing a physical inspection of the work. These managers focus on maintaining an overall pass rate of 99% on all measures and services inspected. From their inspections, QPMs provide one-on-one technician training to maintain a consistent high-quality result. The Implementer uses the Synergy Tech System® to capture measure installation data in the field securely and to electronically transfer the data for invoicing and energy savings reporting. Every two weeks, Synergy Managers hold on-site trainings with Synergy outreach and technicians at the Synergy company facilities and review industry changes/trends that have been emailed and communicated throughout the weeks and provide program specific trainings. Synergy employs a full-time safety and compliance director that reviews and directs compliance with applicable laws and regulations.</p>
Compliance with Prescriptive Workforce Standards:	<p>Synergy is committed to continuing its compliance with the prescriptive workforce standards as outlined in that apply to Ordering Paragraphs 1 and 2 of Decisions 18-10-008 and 18-05-041. Synergy is also committed to adopting any modifications and adjustments to prescriptive workforce standards. Demonstrating Synergy's commitment is illustrated through Synergy's current compliance with prescriptive workforce standards on SCE's ESA, Res DI, and CMHP programs.</p>

10. **Disadvantaged Worker Plan:**⁴

This program supports job access to career opportunities in the energy efficiency industry and contributes to the IOU's portfolio-level goals for disadvantaged workers as defined in Decision 18-10-008. The process begins with disadvantaged worker (DAW) identification during the employee onboarding process. The program Implementer's onboarding forms include questions that identify if the work candidate meets one of the criteria listed in the definition of a disadvantaged worker. This process has been in place since 2022 resulting in the current workforce containing DAWs that service the program's market sector.

To find additional DAWs, the Implementer actively posts job openings online and promotes career opportunities amongst its employees to share with friends, family, and customers. These recruitment efforts reach unemployed and underemployed customers residing in disadvantaged communities as well as low-income program participants. These activities drive potential DAW employees to interviews and onboarding where they are identified, and the information is recorded.

11. **Additional Information**

Not applicable.

⁴ D.18-10-008, Attachment B, Section D, page B-9.

3. Supporting Documents

Attach all the following documents as PDF-format files to this file:

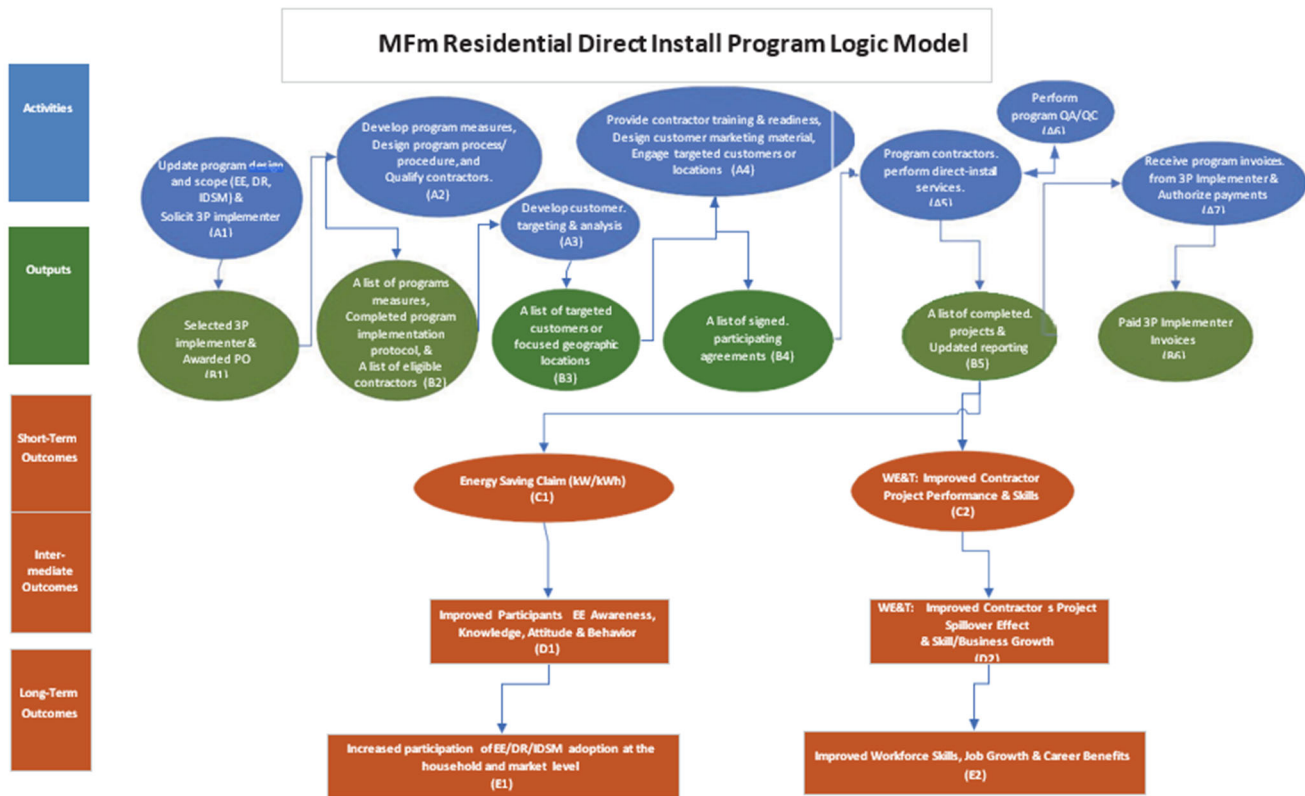
1. Program Manuals and Program Rules

All programs must have manuals⁵ uploaded in CEDARS to clarify the eligibility requirements and rules of the program for Implementers and customers. Program rules must comply with CPUC policies and rules. Table templates are available at CEDARS. At minimum, these manuals should include:

#	Information Required	Short Description
1	Eligible Measures or measure eligibility, if applicable	Provide requirements for measure eligibility or a list of eligible measures
2	Customer Eligibility Requirements	Provide requirements for program participation (for example, annual energy use or peak kW demand)
3	Contractor Eligibility Requirements	List of any contractor (and/or developer, manufacturer, retailer or other "participant") or sub-contractor eligibility requirements. (For example: specific required trainings, specific contractor accreditations, and/or specific technician certifications required.)
4	Participating Contractors, Manufacturers, Retailers, Distributors, and Partners	<ul style="list-style-type: none">For upstream or midstream incentives and/or buy-down programs indicate these, if applicable.
5	Additional Services	Briefly describe any additional sub-program delivery and measure installation and/or marketing & outreach, training, and/or other services provided, if not yet described above.
6	Audits	Indicate whether: <ul style="list-style-type: none">Pre- and post-audits are requiredFunding or incentive levels have been set for auditsEligibility requirements for audit incentivesWhich demand-side resources will be included within the audit's scope, andWho will perform the audit.
7	Sub-Program Quality Assurance Provisions	Please list quality assurance and quality control requirements, including accreditations and/or certification or other credentials.
8	Other Program Metrics	List all documentation and data used to calculate Program Metrics. This includes but is not limited to data in support of sector-level and portfolio-level metrics.

⁵ "Manuals" are defined as materials given to Implementers and customers, not internal process documents.

2. Program Theory⁶ and Program Logic Model⁷



Decision 21-06-015 instructed the IOUs to prioritize targeted customers by key segments. The Multifamily Residential Direct Install Program is designed to target customers with the following characteristics:

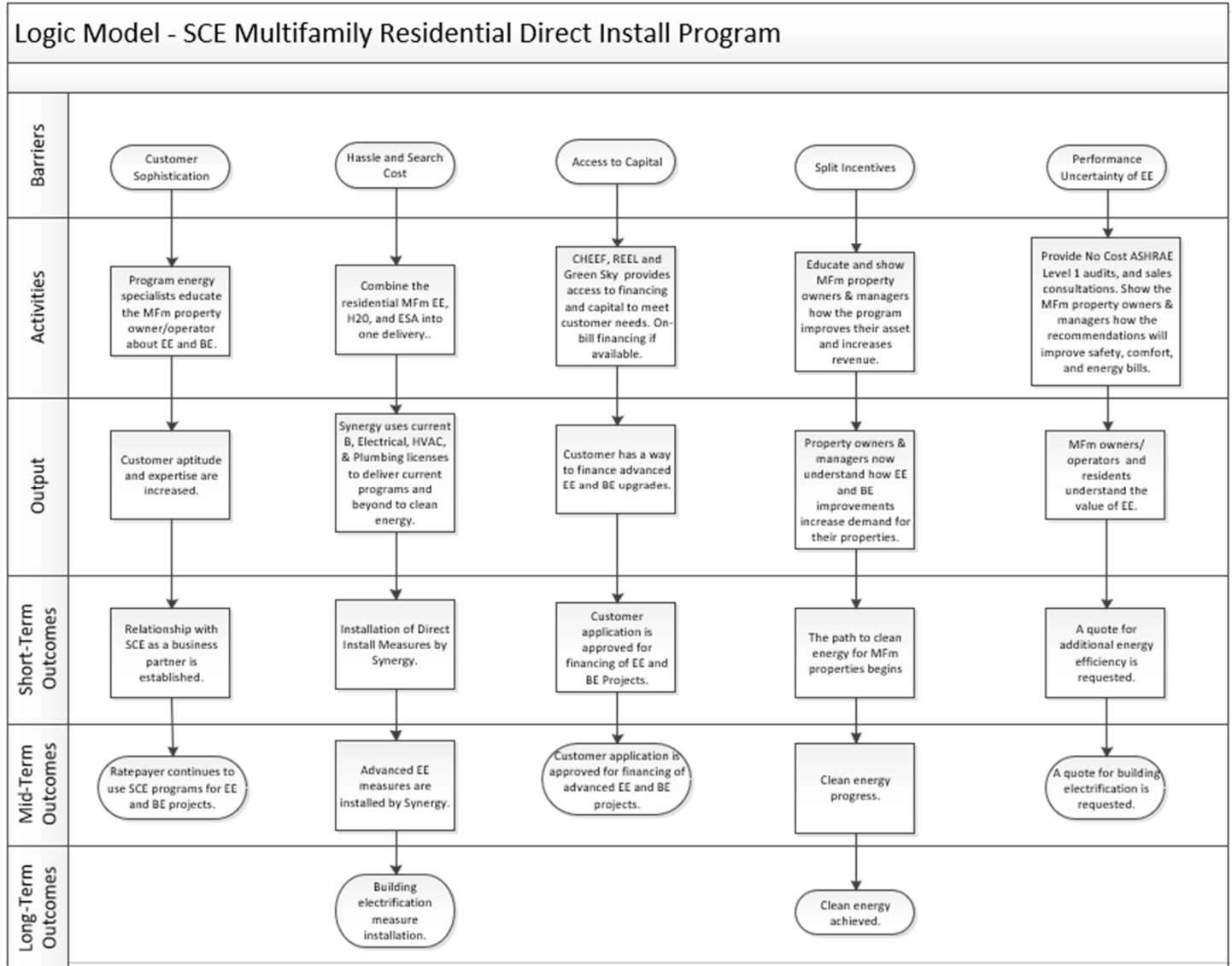
- Disadvantaged Communities (DAC)
- Hard-to-Reach (HTR)
- Rural
- Climate Zones (9, 10, 13, 14, and 15)

The Multifamily Residential Direct Install program theory is about being a cost-effective direct install resource acquisition program and clean energy pathway for Multifamily properties. The program targets lower-income and moderate-income households, with the characteristics identified above, to offer direct installation of Energy Efficiency and Demand Response measures at no charge to ease their financial and energy burden. The Implementer refers and or enrolls low-

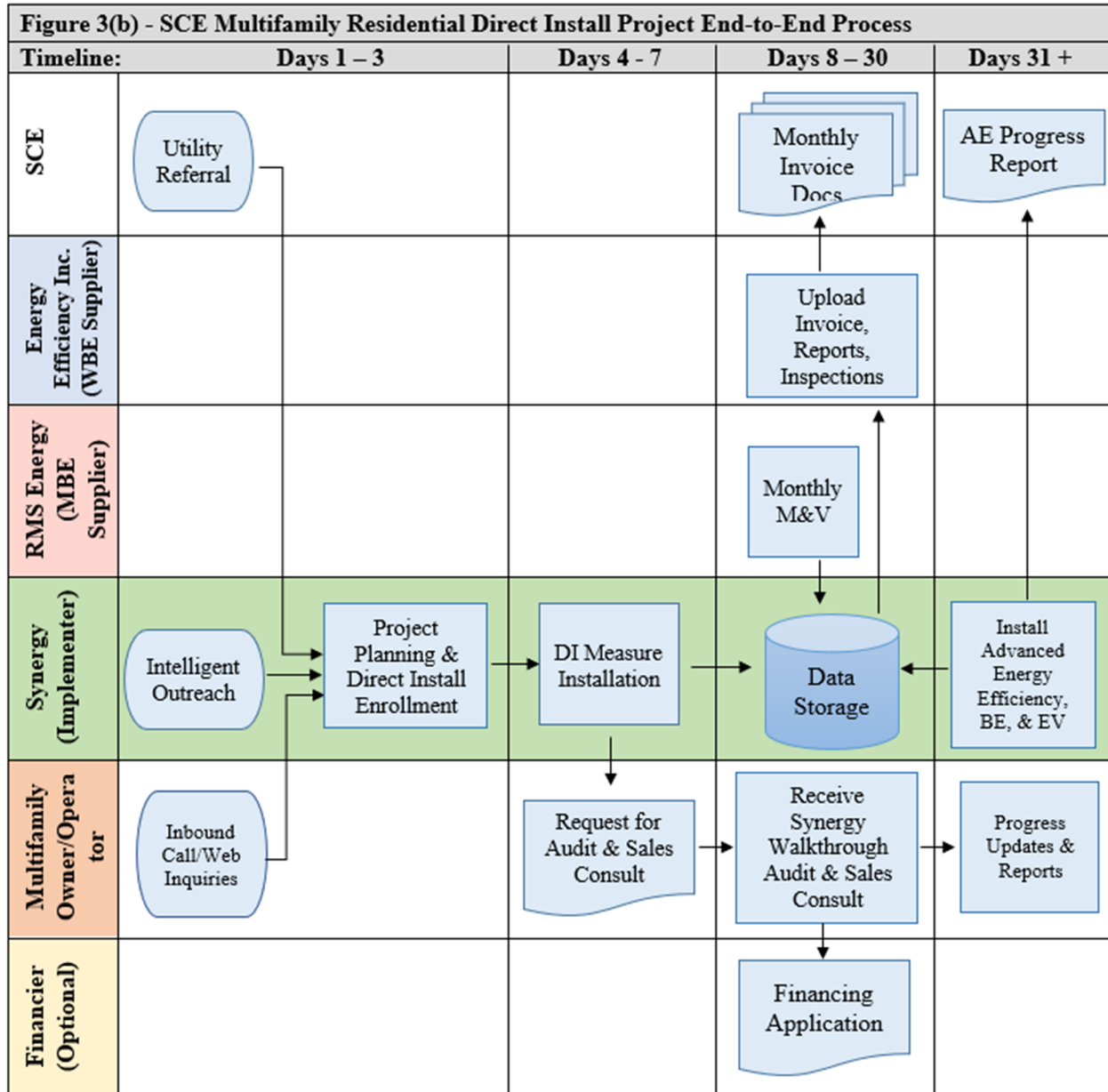
⁶ The expected causal relationships between program goals and program activities in a way that allows the reader to understand why the proposed program activities are expected to result in the accomplishment of the program goals. A well-developed program theory can (and should) also describe the barriers that will be overcome in order to accomplish the goals and clearly describe how the program activities are expected to overcome those barriers. *California Evaluation Framework*, June 2004.

⁷ The graphical representation of the program theory showing the flow between activities, their outputs, and subsequent short-term, intermediate, and long-term outcomes. *California Evaluation Framework*, June 2004.

income participants to income-qualified programs (IQP). The short-term outcome for the program will include immediate, intermediate, and longer-term energy savings.



3. Process Flow Chart



4. Incentive Tables, Workpapers, Software Tools⁸

#	Measure	Incentive Level
1	Duct Seal, Residential	Direct Install
2	Brushless Fan Motor Replacement, Residential	Direct Install
3	Smart Thermostat, Residential	Direct Install
4	Smart Fan Controller, Residential	Direct Install
5	Lifecycle Refrigerant Management, Residential	Direct Install
6	UL Type B LED Mogul Base Lamp HID Retrofits for Outdoor Area/Pole and Decorative Fixtures	Direct Install
7	Heat Pump Water Heater, Residential, Fuel Substitution	Direct Install
8	Large Heat Pump Water Heater, Commercial and Multifamily, Fuel Substitution	Direct Install
9	Faucet Aerator, Residential	Direct Install
10	Low-Flow Showerhead, Residential	Direct Install
11	Ceiling Insulation, Residential	Direct Install

#	Workpaper Name	Short Description	URL link or location name
1	SWSV001-06	Duct Seal, Residential	www.caetrm.com
2	SWHC038-04	Brushless Fan Motor Replacement, Residential	www.caetrm.com
3	SWHC039-08	Smart Thermostat, Residential	www.caetrm.com
4	SWHC059-05	Smart Fan Controller, Residential	www.caetrm.com
5	SWSV014-02	Lifecycle Refrigerant Management, Residential	www.caetrm.com

⁸ Per D.19-08-009, for fuel substitution measures where the incentive exceeds the Incremental Measure Cost (IMC), the CPUC requires submission of a workpaper addendum using a separate template. Third-party Implementers can request the template from their Contract Manager. SCE Program Managers should refer to the E-PPICs Smart Sheet.

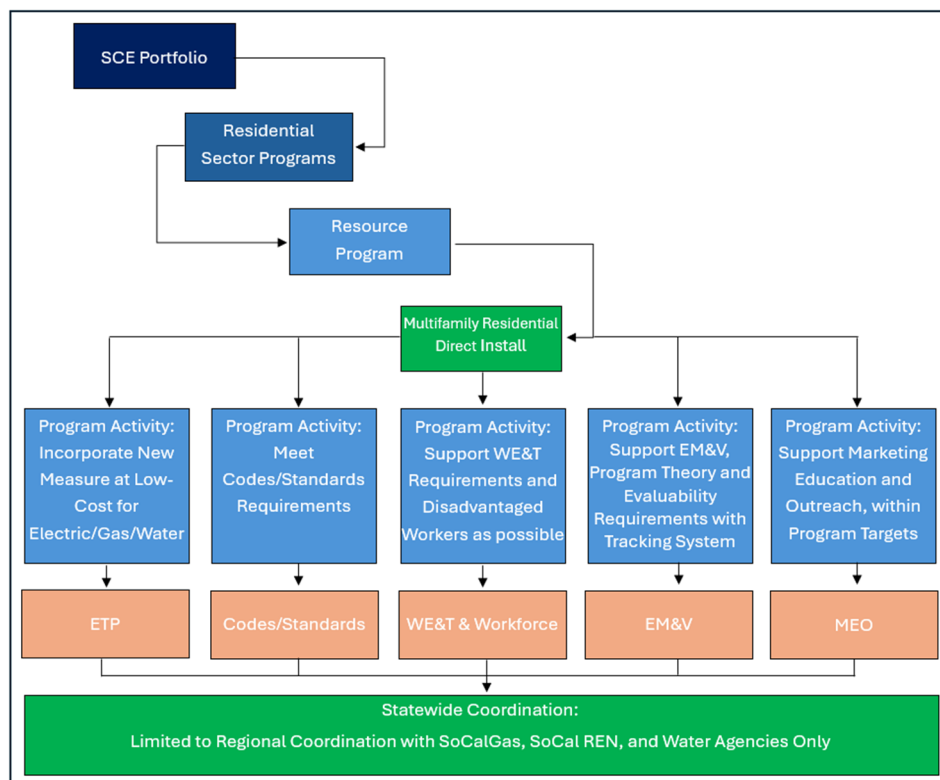
#	Workpaper Name	Short Description	URL link or location name
6	SWLG020-02	UL Type B LED Mogul Base Lamp HID Retrofits for Outdoor Area/Pole and Decorative Fixtures	www.caetrm.com
7	SWWH025-07	Heat Pump Water Heater, Residential, Fuel Substitution	www.caetrm.com
8	SWWH028-04	Large Heat Pump Water Heater, Commercial and Multifamily, Fuel Substitution	www.caetrm.com
9	SWWH001-04	Faucet Aerator, Residential	www.caetrm.com
10	SWWH002-04	Low-Flow Showerhead, Residential	www.caetrm.com
11	SWBE006-06	Ceiling Insulation, Residential	www.caetrm.com

5. Quantitative Program Targets

The targeted number of projects is 4,500 Multifamily homes treated annually.

6. Diagram of Program

Multifamily Residential Direct Install Program Diagram



7. **Evaluation, Measurement, and Verification (EM&V):**

The programs measure mix, and goals are based on approved current CPUC measure package values found in the eTRM with downstream direct install as the delivery type. These permutations are valid and the implementation of these will result in claimable energy savings. Impact evaluations and mid-cycle updates will change the claimable energy savings values in future years.

For Impact Evaluations, SCE will rely on CPUC's Energy Division to plan and fund this activity.

8. **Normalized Metered Energy Consumption (NMEC):**

Not applicable.

APPENDIX. List of Acronyms and Abbreviations

Term	Definition
C&S	Codes & Standards
CALCTP	California Advanced Lighting Controls Training Program
CEDARS	California Energy Data and Reporting System
CPUC	California Public Utilities Commission
DAC	Disadvantaged Communities
DEER	Database for Energy Efficient Resources
DSM	Demand-Side Management
EE	Energy Efficiency
EE PRG	Energy Efficiency Procurement Review Group
EM&V	Evaluation, Measurement & Verification
ET	Emerging Technologies
EUL	Effective Useful Life
FSU	Fractional Savings Uncertainty
HTR	Hard-to-Reach
HVAC	Heating, Ventilation, & Air Conditioning
IOU	Investor-Owned Utility
IP	Implementation Plan
kW, kWh	kilowatts, kilowatt-hours
M&V	Measurement & Verification (or, sometimes, Validation)
NMEC	Normalized Metered Energy Consumption
PA	Program Administrator
PAC	Program Administrator Cost
RFA	Request for Abstract
RFP	Request for Proposal
TRC	Total Resource Cost
WE&T	Workforce Education & Training