

Pacific Gas and Electric Company

Implementation Plan

Business Energy Report Program

**Prepared by Oracle Corporation on behalf of Pacific
Gas and Electric Company**

Updated March 2024

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1. Program Budget and Savings Information

1. **Program and/or Sub-Program Name**

Business Energy Report (BER) Program

2. **Program and/or Sub-Program ID Number**

PGE_Com_007

3. **Program and/or Sub-Program Budget Table**

3-Year Business Energy Report Program					
Admin	Marketing	Direct Implementation	Incentives	EM&V	Total Budget
		\$472,670			\$472,670

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

3-Year Business Energy Report Program Gross Savings Forecast		
kWh	kW	Therms
TBD	TBD	TBD

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

2024 BER TRC
TBD

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

2024 BER PAC
TBD

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

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

Program Implementer	
Partnership	<input type="checkbox"/>

8. **Market Sector**

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

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 type="checkbox"/>
Incentive	<input type="checkbox"/>
Finance	<input type="checkbox"/>
Audit	<input type="checkbox"/>
Technical Assistance	<input type="checkbox"/>

Market Channels	
Other: Behavior	<input checked="" type="checkbox"/>

Campaign Goals and Timeline:

2. Implementation Plan Narrative

1. Program Description

The Business Energy Report (BER) program was initially introduced as a pilot component of the Continuous Energy Feedback Program (CEFP), which operates under a separate Program ID (PGE_Res_002d: Residential Behavioral Program). The BER program serves small/medium business (SMB) and agricultural customers in the commercial and agricultural sectors, using multiple behavior-based energy efficiency strategies to support customers in understanding their energy usage and empowering them to manage and lower their electricity and gas consumption. The BER program uses information and customer engagement strategies to prompt non-rebated behavior change that can be measured using Randomized Controlled Trials (RCT) to validate savings and demonstrate attribution. As a result of their changed behaviors, customers can better manage their energy use and energy behaviors, make more efficient purchasing decisions, and take better energy related actions in order to lower their energy bills and energy footprint.

2. Program Delivery and Customer Services

Describe how the energy efficiency (EE) program will deliver offerings (including program strategies/tactics, market channel, and targeted market/customer group); how it will reach customers, including those in CPUC-defined hard-to-reach and/or disadvantaged communities (if applicable), and any services that the program will provide. Describe all services and tools that are provided.

This is a pilot project for the Oracle Business Energy Reports (BERs), otherwise known as the small/medium business (SMB) pilot project, for a select number of PG&E’s small/medium business and agricultural customers. The pilot is intended to provide SMB and agricultural customers in the Agriculture, Retail, and Food Service and Accommodation segments with weekly email reports to inform them of their energy usage patterns and trends. The BERs will help these customers better understand how their actions correspond to their utility bills and provide them with helpful insights on how to adjust their energy usage.

The BER program is implemented using an RCT. RCT is a type of experimental design in which members of an eligible population are randomly assigned to either a treatment group or a control group. The program interventions are then provided only to the treatment group. Savings are estimated by calculating the difference in usage between the two groups using lagged dependent variable methodology (See the: Evaluation, Measurement, and Verification (EM&V) section for additional details on RCT).

Program participants are automatically enrolled in the BER program via an “opt-out” methodology, so the

marketing and outreach plan defines the Program design for communicating with those selected customers with the explicit goal of driving energy savings and increasing customer engagement. The treatment group (the group receiving communications) is estimated to be up to 35,000 customers and the control group (the group not receiving communications) is estimated to be up to 20,000 customers.

All BER customer communications are subject to PG&E approval prior to deployment.

Customers who participate in the Business Energy Report (BER) email program receive one of the following email types each week:

- Introduction emails
- Weekly Business Energy Report emails
- Post-Bill Business Energy Report emails

Business Energy Report- Introduction Emails

The Introduction email is the first weekly email customers receive as part of the program. This email is designed to welcome customers to the program, provide energy use insights, and offer tips on how to reduce use during peak hours.

The Introduction email contains these modules:

- **Welcome Message Module:** This module appears below the header and introduces customers to the program. This module is only included in the Introduction email, not in subsequent emails.
- **Weekly Usage Module:** This module educates customers about how their electricity use in the past week compares against the prior week.
- **Daily Usage Module:** This module displays the customers' usage each day of the last week, educating customers about how their electricity use in the varies from day to day.
- **Hourly Usage Module:** This module displays data on how their electricity use varied throughout the day on the day they used the most electricity.
- **Bill Projection:** This module provides an estimate of the projected usage for the current billing cycle, as well as the number of days remaining in their billing cycle.
- **Marketing and Program Related Messaging:** This module provides information about programs available and tips customers can take to reduce their energy use and costs.

Weekly Business Energy Report emails

The weekly email is delivered to customers at the end of each week. It provides insights on the customers' usage the prior week- comparing against the week before and providing visuals of the usage by day and the usage by hour of their highest-use day. Customers participating in the program begin receiving the weekly email after they receive their Introduction email, and do not receive the Weekly Coach email in weeks when they receive the Post-Bill Business Energy Report email.

The Weekly Coach emails contain these modules:

- **Weekly Usage Module:** This module educates customers about how their electricity use in the past week compares against the prior week.
- **Daily Usage Module:** This module displays the customers' usage each day of the last week, educating customers about how their electricity use in the varies from day to day.

- **Hourly Usage Module:** This module displays data on how their electricity use varied throughout the day on the day they used the most electricity.
- **Bill Projection:** This module provides an estimate of the projected usage for the current billing cycle, as well as the number of days remaining in their billing cycle.

Post-Bill Business Energy Report email

The Post-Bill Business Energy Report email is delivered every four weeks to customers participating in the program, in the week following the end of their billing period. It includes information about how the customer's electricity usage compared in the last billing period against the prior billing period.

The Post-Bill Business Energy Report email contains these modules:

- **Post-Bill Comparison:** This module displays the customer's total usage during the last billing period and the prior billing period to give customers a sense of whether their usage is trending up or down.
- **Marketing and Program Related Messaging:** This module provides information about programs available and tips customers can take to reduce their energy use and costs.

3. Program Design and Best Practices

Describe the program strategies/tactics that will be used to reduce the identified market barriers for the targeted customer group and/or market actor(s). Describe why the program approach constitutes "best practices" or reflects "lessons learned." Include descriptions of key software tools that are significant to program strategy and implementation, including audit tools. Provide references where available

Program Design and Customer Selection

The BER program builds upon the effectiveness of Oracle's existing three million and fifty-thousand (3,050,000) household CEF program with PG&E while serving portions of the non-residential market sector.

Customers in the BER program are automatically enrolled into the program and are chosen based on a myriad of characteristics, such as fuel-type, availability of a valid email for communications, availability of AMI data, and industry sector (NAICS code).

Learnings from Oracle's existing HER program are being applied to maximize for cost effective savings.

Measurement and Reporting of outcomes

Once BER program communications have started going out to customers, there are a number of metrics which are measured and reported on a regular basis, such as email engagement, customer satisfaction, and measured kWh savings (note that the pilot is focused on electric savings (kWh)). See section 5 for more information on Quantitative Targets.

4. Innovation

The BER pilot leverages Opower and PG&E's deep experience in Behavior Energy Efficiency

through its CEFPP program to drive customer engagement and energy savings for PG&E SMB customers.

For the BER pilot, Opower's weekly energy education communications (weekly HER or wHER) have been updated to be more appropriate for SMB customers through both product-level changes to handle SMB data, and communication-specific changes to cater the content to the SMB audience. This enables Opower and PG&E to test the hypothesis that SMB customers, like PG&E's residential CEFPP recipients, will respond well to frequent weekly communications providing insights on their energy use trends, as well as useful suggestions on available programs and steps to take to save energy and money.

The insights PG&E and Opower will gain by running this pilot and testing this hypothesis will inform further development and innovation on communications geared towards SMB customers with the goal to engage, educate, and equip these customers to take action and achieve cost effective savings.

5. Metrics

The primary metrics for the BER pilot are energy savings (kilowatt hours (kWh)) and customer engagement and satisfaction. Total System Benefit (TSB) is also an important metric.

- **kWh savings:** Measured continuously through the RCTs and on a monthly basis.
- **Customer engagement with digital communications:** Open and click through rates for the program's digital communications.
- **Customer Satisfaction (CSAT):** A digital Customer Engagement Tracker survey will be delivered to a subset of treatment and control customers once during the pilot's first phase from August, 2023-August, 2024. It will contain questions asking customers about key CSAT metrics, to be decided on in collaboration with PG&E before surveys are sent to customers.
- **Opt-out Rates:** Percentage of treatment customers who opted not to receive BERs in any channel will be tracked and reported.
- **Total System Benefit (TSB):** TSB is a measurement of the value of the impact of the program, expressed in dollars and determined by loading savings data and load curves in the CET tool.

6. For Programs Claiming To-Code Savings

Claiming To-Code savings is not applicable to the BER program.

7. Pilots

This is a pilot project for the Oracle Business Energy Reports (BERs), otherwise known as the small/medium business (SMB) pilot project, for a select number of PG&E's small/medium business and agriculture customers. The pilot is intended to provide SMB and agriculture customers with weekly email reports to inform them of their energy usage patterns, trends, and estimated energy costs. The BERs will help SMB and agriculture customers better understand how their actions correspond to their utility bills

and provide them with helpful insights on how to adjust their energy usage. The overall solution includes consulting services and a software as a service (“SaaS”) subscription. The consulting services (setup) include data integration and product configuration, testing, and launch services which occurred for approximately six (6) months. The SaaS subscription, once setup was completed, is estimated to run for twelve (12) months, currently through August 2024.

8. **Workforce Education & Training (WE&T)**¹

WE&T is not applicable to the BER program.

9. **Workforce Standards**²

Workforce Standards are not applicable to the BER program.

10. **Disadvantaged Worker Plan**³

The Disadvantaged Worker Plan is not applicable to the BER program.

11. **Additional Information**

Include here additional information as required by CPUC decision or ruling, as applicable. Indicate decision or ruling and page numbers.

3. **Supporting Documents**

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

1. **Program Manuals and Program Rules**

Program manual available upon request.

2. **Program Theory**⁴ **and Program Logic Model**⁵

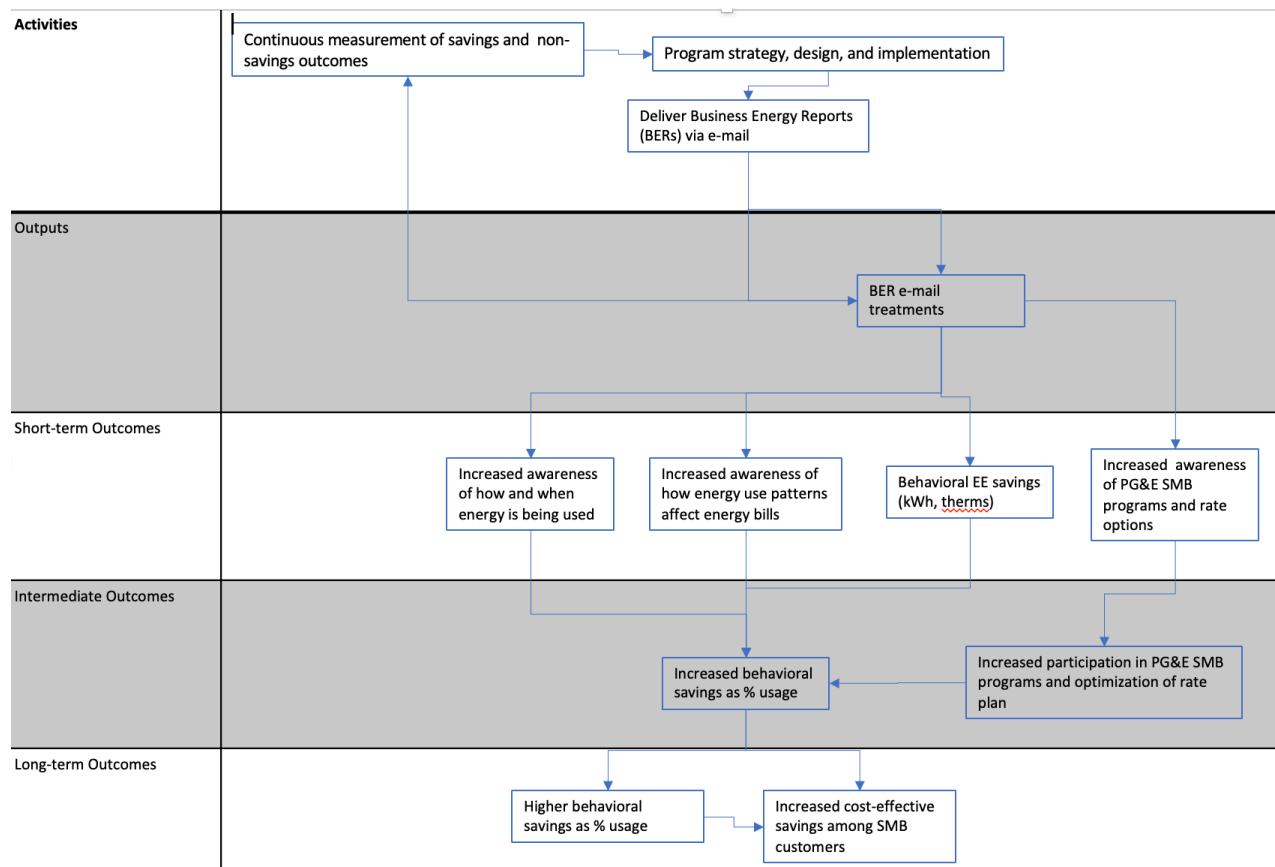
¹ D.18-05-041, Page 20-21 and Ordering Paragraph 7.

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

³ D.18-10-008, Attachment B, Section D, page B-9.

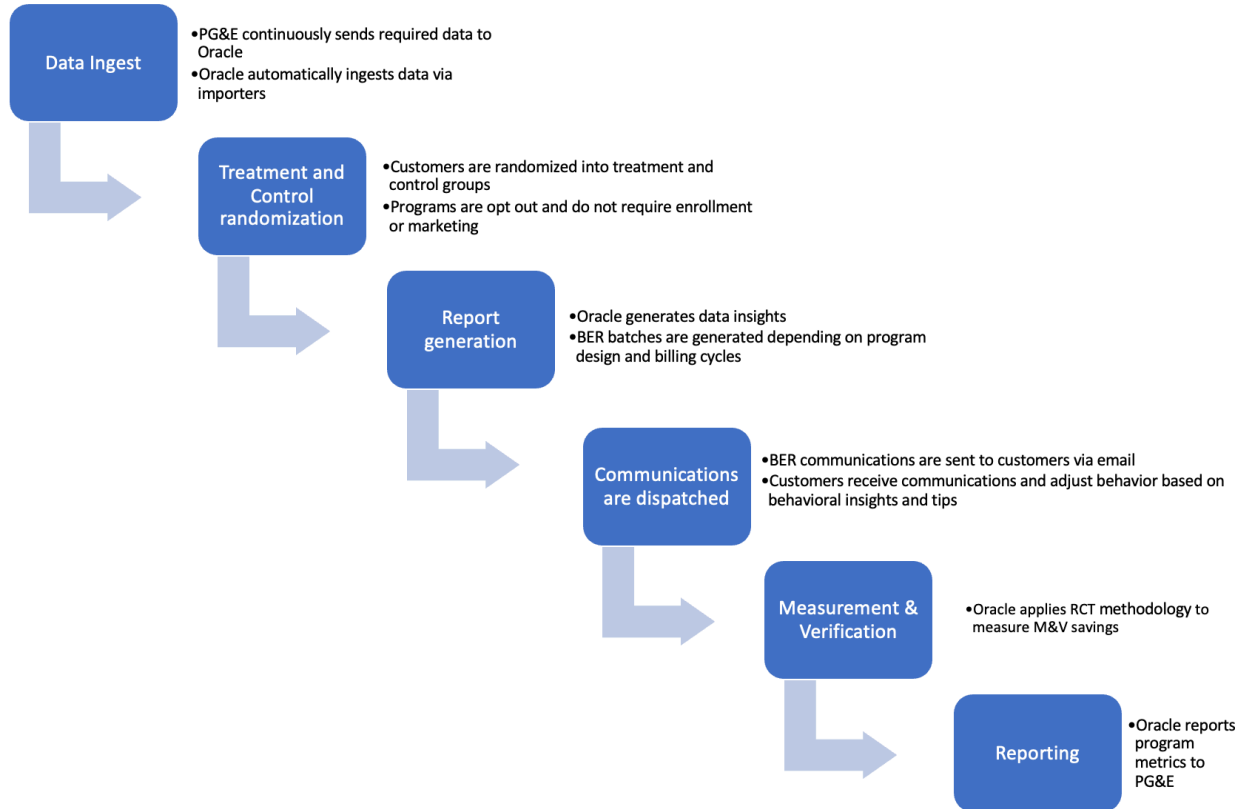
⁴ The expected causal relationships between program goals and program activities in a way that allows the reader to understand why the proposed program activities are expected to result in the accomplishment of the program goals. A well-developed program theory can (and should) also describe the barriers 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.

⁵ 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.



3. Process Flow Chart

RCT Process Flow Chart



4. Incentive Tables, Workpapers, Software Tools⁶

#	Workpaper Name	Short Description	URL link or location name
1	SWWB007	Business Energy Reports	https://www.caetrm.com/measure/SWWB007/01/

5. Quantitative Program Targets

3-Year Business Energy Report Program Gross Savings Forecast
kWh
TBD

⁶ 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. PG&E Program Managers should refer to the E-PPICs Smart Sheet.

Beginning in 2024, Total System Benefit (TSB) will be added as a quantitative program target when it becomes the new goal metric for CA IOU EE portfolios.

6. **Diagram of Program**

The BER program does not have subprograms.

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

Randomized Controlled Trial

A randomized controlled trial (RCT) will be conducted by sector/segment that includes the SMB Pilot Treatment Group (including small/medium business and agriculture customers) and PG&E’s other SMB and agriculture customers as a control group, and share with PG&E the results of the RCT. Oracle will make a reasonable effort for the RCT results to include the following:

1. Reporting on estimated savings (kWh) differential between the Treatment and Control Groups
2. Reporting on customer satisfaction differential between the Treatment Group and the CET results or other metric as mutually agreed by the Parties.

Reporting on customer engagement rates with the BER compared to the ongoing contemporaneous engagement rates with the eHER residential population.

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

NMEC does not apply to the BER program.

APPENDIX. List of Acronyms and Abbreviations

Term	Definition
AG	Agriculture
BER	Business Energy Report (BER)
CEFP	Continuous Energy Feedback Program
CPUC	California Public Utilities Commission
DEER	Database for Energy Efficient Resources
DID	Difference-of-Differences
DSM	Demand-Side Management
EE	Energy Efficiency
EM&V	Evaluation, Measurement & Verification
HER	Home Energy Report
IP	Implementation Plan
kWh	Kilowatt-hours
M&V	Measurement & Verification (or, sometimes, Validation)

NAICS	North American Industry Classification System
NMEC	Normalized Metered Energy Consumption
RCT	Randomized Control Trial
SMB	Small/Medium Business
TRC	Total Resource Cost
wHER	Weekly Home Energy Report