Implementation Plan

Simplified Savings

SCE Local Small Medium Business Equity Program

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First Filing Date: 08/15/2023

Revision Filing Date: 09/25/2023

Version 2.1

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Program Overview

The Simplified Savings Program aims to deliver meaningful energy bill savings to Southern California Edison's (SCE's) Small and Medium Business (SMB) customers operating within Disadvantaged Communities[1](DAC) and/or are considered Hard-to-Reach customers[2] (HTR). The Program will achieve this through local partnerships with Trade Allies (TAs) such as The Ortiz Group, Environmental Innovations (EI), and California Green Business Network (CAGBN), as well as Community Based Organizations (CBOs) for customer outreach, and will offer services such as energy education, bill analysis, free direct install (DI) measures, and incentives for higher impact energy saving measures referred to as Post-DI measures. The focus is specifically on non-residential SCE customers with a monthly maximum demand of ≤200 kW. Customers can select their TA by searching for contractors who match their desired criteria (e.g., languages spoken, diverse ownership, Better Business Bureau ratings, customer reviews).

The Program sets out to achieve key objectives, including engaging 5,500 customers through targeted outreach, providing an estimated first-year energy bill savings of nearly $3 million, and engaging, training, and building TA businesses to better serve their communities through a train-the-trainer model.

FCI Management, in cooperation with CBOs, will run an initiative to recruit disadvantaged and underserved workers into a job training program. This program will equip them with relevant skills and facilitate their placement into good-paying clean energy industry positions. Optional enhancements, such as certification through educational organizations, paid internships, scholarships, or a mentor protégé paid training program, may also be provided at an extra cost.

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[1] *"Disadvantaged Community" means a census tract that either:*
a)   scores at or above the 75th percentile (i.e., scoring in the top 25 percent statewide) in the California Environmental Protection Agency's (CalEPA) CalEnviroScreen 3.0, or successor thereof, on a statewide basis, or
b)   is one of the 22 census tracts that score in the highest five percent of CalEnviroScreen's pollution burden, but that do not have an overall score in the top 25 percent because of unreliable socioeconomic or health data.

[2] *"Hard-to-Reach Customer(s)" means a customer or customers who do not have easy access to energy efficiency program information or generally do not participate in energy efficiency programs and who satisfy the criteria below by either: (1) satisfying the Geographic Criteria (as defined below) and one additional criterion set forth below or (2) satisfying any three (3) of the following criteria:*
(a)   A customer who has a language barrier and whose primary language spoken is a language other than English;
(b)   A customer with a geographic barrier (i.e., businesses or homes in areas other than the United States Office of Management and Budget Combined Statistical Areas of the San Francisco Bay Area, the Greater Los Angeles Area and the Greater Sacramento Area or the Office of Management and Budget metropolitan statistical areas of San Diego County) or located in a Disadvantaged Community (the "Geographic Criteria");
(c)   For small business customers, additional criteria include:
(i)   A business size that is less than ten employees or classified as very small (i.e., customers whose annual electric demand is less than 20 kilowatt (kW), or whose annual gas consumption is less than 10,000 therms, or both); and
(ii)   A business that leases or rents the facilities in which the energy efficiency investment will be made.

The Program is designed to improve overall customer satisfaction by providing exceptional customer service, making energy efficiency (EE) tangible, and ensuring the participation process is simple. Benefits extend beyond energy savings, encompassing health, comfort, and reductions in water and waste.

Ultimately, these concerted efforts aim to ensure that SMBs and customers residing within DAC receive equitable access to resources, rebates, and opportunities, contributing to a more sustainable and inclusive future.

Program Budget & Savings

1. Program Name

Simplified Savings – SCE Local SMB Equity Program

2. Program ID

TBD

3. Program Budget Table

Costs	Total
Administration	$474,638
Marketing/Outreach	$943,824
Incentive/Rebate	$820,348
Direct Implementation	$12,312,929
Total	$14,551,739

4. Program Gross Impacts Table

Gross	Total
kWh	6,405,117
kW	836
Therms	268,115

*Resource projects only

5. Program Cost Effectiveness (TRC)*Resource projects only*

	2023	2024	2025	2026
Expected TRC Ratio	1.15	1.28	1.38	1.52

6. Program Cost Effectiveness (PAC) *Resource projects only*

	2023	**2024**	**2025**	**2026**
PAC	1.53	2.11	2.32	3.90
PAC w/ 6% of SCE Adder	1.44	2.01	2.21	3.76

7. Type of Implementer
Third Party Delivered

8. Market Sectors
Customer Types that the Program will serve:

- Agricultural
- Commercial
- Industrial
- Public

9. Program Type (resource/non-resource)
Resource - An energy efficiency program that has direct, attributed energy savings through measures deemed as eligible per eTRM workpaper requirements and provides incentive opportunities to offset capital investments for customers. The focus is on payments for savings.

-and-

Non-Resource / Equity- An energy efficiency program that has no directly attributed energy savings, but the program supports the energy efficiency portfolio through installation of energy saving no to low-cost measures, marketing and outreach, utility bill savings, and improved access to training and education.

10. Market Channels and Intervention Strategies
Downstream

Intervention Strategies
- Direct Install
- Incentive
- Finance
- Audit
- Technical Assistance

Goals & Timeline

Expected Non-Resource Project Types

	First Delivery Period Year	Second Delivery Period Year	Third Delivery Period Year	Fourth Delivery Period Year
	Expected Projects	Expected Projects	Expected Projects	Expected Projects
Energy Advisement	121	919	0	0
Outreach Events	0	0	0	0
Workforce Development	0	1	1	0
Non- Resource Measure Name: Smart thermostats	15	267	446	15
Non- Resource Measure Name: LED lamps (int and ext) pin and screw-b a s e d lamps	1,060	19,080	31,800	1,060
Non- Resource Measure Name: Bluetooth smart power strips	52	936	1,559	52
Non- Resource Measure Name: Occupancy sensing wall switches	28	495	825	28
Non- Resource Measure Name: Room air purifiers	11	198	330	11
Non- Resource Measure Name: LED troffer kits 2X2	150	2,700	4,500	150
Non- Resource Measure Name: LED troffer kits and fixtures 2X4	150	2,700	4,500	150
Non- Resource Measure Name:	285	5,134	8,557	285

LED recessed downlight retrofit kit				
Non- Resource Measure Name: Interior LED Fixtures - General	0	1,137	1,989	1,137
Non- Resource Measure Name: LED Fixture Retrofit Kit	0	939	1,643	939
Non- Resource Measure Name: Refrigerated Display Lighting	0	937	1,640	937
Non- Resource Measure Name: Window Film	0	1,466	2,566	1,466

Expected Resource Project Types

	First Delivery Period Year	Second Delivery Period Year	Third Delivery Period Year	Fourth Delivery Period Year
	Expected Projects	Expected Projects	Expected Projects	Expected Projects
Resource Measure Name: Faucet aerators	180	3,240	5,400	180
Resource Measure Name: Pre rinse spray valves	21	372	619	21
Resource Measure Name: Auto door closers - Freezer	23	416	694	23
Resource Measure Name: Pipe insulation	264	4,749	7,916	264
Resource Measure Name: Smart outlets and timers for vending machines	20	356	594	20
Resource Measure Name: Evap fan coolers for walk-in	0	103	180	103
Resource Measure Name: Indoor Low Bay Lighting: LED Fixtures	0	0	0	0
Resource Measure Name: Heat pump replacing a gas furnace	0	37	65	37
Resource Measure Name: Heat pump replacing a heat pump	0	37	64	37
Resource Measure Name: electric to electric water heater	0	15	26	15
Resource Measure Name: Variable Frequency Drive Motors	0	58	101	58
Resource Measure Name: 2- Lamp Linear LED Lamp Hardwired retrofit	0	0	0	0

Resource Measure Name: 3- Lamp Linear LED Lamp Hardwired retrofit	0	0	0	0
Resource Measure Name: Auto door closers -Cooler	0	81	141	81
Resource Measure Name: Type A LED tubes (not B & C listed)	1,400	25,200	42,000	1,400
Resource Measure Name: Indoor Low Bay Lighting: LED Fixtures	0	396	693	396
Resource Measure Name: 2- Lamp Linear LED Lamp Hardwired retrofit	0	394	690	394
Resource Measure Name: 3- Lamp Linear LED Lamp Hardwired retrofit	0	293	513	293

Implementation Plan Narrative

1. Program Description

The Simplified Savings Program (Program) is focused on delivering meaningful energy bill savings to Southern California Edison's (SCE's) SMB customers, including Commercial and Industrial, Agricultural, and Public customers. The target customers are those residing in DACs or that qualify as HTR customers. Program goals are achieved by leveraging local SMB focused TAs, CBOs, and Program experts such as the CAGBN, The Ortiz Group, and EI. Customers will be provided energy education, bill analysis, audits, and no-cost direct install measures as well as incentives for higher impact measures.

Rationale

Traditional non-residential demand side management (DSM) program designs are frequently difficult for SMB customers to access, typically with services and benefits that do not align with the needs of this customer type and size, and with performance metrics that make serving these customers prohibitive. As a result, the need to increase rate-payer services to DAC and HTR customers has been acknowledged.

The Program helps address such gaps by focusing exclusively on non-residential customers with a monthly maximum demand of two hundred (200) kW or less in any three-month period during the preceding twelve months, as measured by the applicable utility meter. The Program focuses on customers within DAC and/or HTR and offers the scale and scope of services required by this customer group to ensure meaningful and continued engagement.

Objectives

The Resource Innovations team expects the Program to achieve significant, positive, and valued outcomes for SCE and its customers. High-level objectives include:

- **Serving 5,500 SMB customers through targeted outreach and simplified participation.** This will be achieved through the marketing/outreach plan generating demand, and offering a relevant, simple, and impactful Program.

- **Providing meaningful energy savings; health, comfort, and safety benefits; and water and waste reduction.** The Program is expected to deliver first-year energy bill savings of nearly $3 million as a direct result of the Program's direct install service and follow-up projects. Approximately $196,000 of these savings will come from direct install (DI) measures that provide claimable savings, and $2.42 million will come from DI measures that do not provide claimable savings. Approximately $284,000 will come from follow-up project measures that provide claimable savings, and $83,000 will come from follow-up project measures that do not provide claimable energy savings. Additional benefits are realized by coordinating participation in Green Business

Programs and other relevant offerings. Green Business Programs offer additional services not provided by the Program and does not offer these services utilizing EE funding.

- **Engaging, training, and building TA businesses to better serve their communities** through a train-the-trainer model. One TA in Commonwealth Edison's (ComEd's) small business program grew their business from a one-person shop to more than 40 employees over three years of participation. Another TA in CenterPoint Energy's small business program stated, "We feel strongly that this program will continue to grow our business and is a positive impact on our community."

- **Increasing customer satisfaction with SCE** by making efficiency real and meaningful, making the participation process straightforward and effective, and providing exceptional customer service throughout.

Environmental and Social Justice (ESJ) Action Plan Goals
The Program will improve access to energy efficiency for DAC and promote California Public Utilities Commission's (CPUC's) ESJ Action Plan Goals 1, 2, and 5 by reducing energy burden and greenhouse gas (GHG) emissions, and improving public health in HTR customer businesses and DACs:

- **Goal 1:** The Program's strategies include local TA and CBO engagement to spread awareness, provide easy access to Program offerings, improve trust, and increase Program participation. The Program will leverage existing partnerships with local CBOs and TAs and provide training and materials so that they can be a trusted resource within their communities.

- **Goal 2:** The Program will recruit businesses within DACs and underserved communities through data-driven targeted marketing, multilingual outreach, local recruitment, and simplified Program participation. This will be accomplished by TAs with the tools necessary to be recognized as trusted SCE representatives, such as cobranded marketing materials or educational leave-behinds. This will also be achieved through a multi-channel marketing approach, in which customers are targeted and reached with the right messages at the right time. Messaging will be succinct and educational and allow for a clear path to Program participation and contact information while also addressing seasonality or specific measures when applicable.

- **Goal 5:** The Program will leverage CAGBN's Equity Committee and active advocacy effort to be the voice for DACs and amplify the need for more equitable program delivery for HTR customer businesses, DACs, and businesses owned by Black, Indigenous, and people of color (BIPOC). The Program team will leverage CAGBN's Equity Committee, a group of Green Business Program professionals formed to represent a variety of historically underserved communities. The CAGBN Equity Committee has developed equity-focused strategies and resources to serve historically underserved communities, many of which fall into DACs. The Equity Committee will continue to help guide

recruitment materials, communication tools, and outreach efforts. They have extensive knowledge of engaging within these communities. For instance, the Equity Committee analyzes business inclusion demographics compared to state demographics, and decides where concerted effort is necessary to provide more equitable services. In addition, they brainstorm on methodology to increase involvement from regions or demographics. For example, Facebook Live, WhatsApp, Univision, and Telemundo worked well for Latinx businesses. The same gaps that have been identified and are being addressed with increased Green Business recruitment will no doubt coincide with areas of focus for this equity-centered energy efficiency offering.

In addition to the Equity Committee's guidance, the Program will offer CAGBN's outstanding relationship with local government and other Non-Government Organizations (NGOs) to help advocate for these services and DACs. CBO partners will help to identify where to lend Program advocacy, making sure it's both wanted by partners and is as effective as possible. In addition, CAGBN has and will continue to ensure that SMBs receive equitable delivery of ratepayer and tax-funded resources and rebates. CAGBN has advocated for this with various state agencies and elected officials for several years.

2. Program Delivery & Customer Services

Program Strategies/Tactics

The Program will attract SMB customers, overcome participation barriers, and achieve SCE's goals through the following strategies:

- **Use a network of local SMP-focused TAs** (including FCI Management); partnership with Environmental Innovations' nonprofit, the CAGBN; and RI team's established relationships with CBOs to broaden awareness and access. RI will provide the necessary tools, training, and support to enable the network to actively promote the Program within their communities.

- **Bring the Program to customers through local experts** (e.g., TAs, CBOs) who engage them, conduct site assessments, install projects, serve as their single point of contact, and facilitate Program participation.

- **Minimize participants' costs** through DI measures, incentives for add-on measures applied as discounts on project invoices to buy down costs and minimize customer's out of pocket costs, financing programs like SCE On-Bill Financing (OBF) and GoGreen Financing, and funding from leveraged programs. Providing a full range of incentives and financing can assist the customer with buying down or eliminating the cost of participation.

- **Streamline assessments and participation** using the project facilitation tool, including virtual energy assessment capabilities. The project facilitation tool will provide a full report with qualified measure opportunities as well as other programs and tips customers can benefit from to lower their energy burden.

- **Enhance engagement with underserved communities, DAC, and HTR customers** through marketing and outreach, recruitment of TAs in DACs and with diverse workforces, and established relationships with trusted CBOs.

- **Achieve comprehensive energy savings** by providing full site assessments and offering HVAC, lighting, refrigeration, and plug load measures, and other targeted measures that address common SMB customer health and safety issues (e.g., improved lighting, heat pump water heaters replacing gas water heaters for improved air quality).

- **Achieve persistent energy savings** through ongoing engagement opportunities, including signing up for SCE's online bill/usage analysis tools and facilitating SMB customer participation in Green Business Certification through the CAGBN (owned by Environmental Innovations). The Green Business Certification program assists customers with going deeper into areas of sustainability such as water usage and waste disposal. Local green business coordinators will conduct audits, provide technical assistance, and work with the appropriate environmental agencies to ensure candidates' environmental compliance. After successful signoffs from all audits and inspections, the business will be officially recognized as a Green Business by the CAGBN and will receive the right to use the Green Business logo and other program materials for self-promotion, be promoted to the public via a listing in the online, searchable statewide directory, and receive other free promotions through their local program.

All SCE Commercial and Industrial customers, Agricultural customers, and Public customers with a demand ≤200 kW who meet eligibility requirements can participate in the Program. The Program will serve SCE's entire territory, focusing outreach and TA capacity on HTR customers located in underserved communities and DACs, including the Central Valley, Los Angeles County, and the Inland Empire.

A local, diverse outreach team will be equipped with web-based tools to quickly assess each customer's facility, determine the optimal project plan, and communicate it to key decision-makers. The outreach team will be from the communities SCE serves, reflect the target populations, and gain the trust of those communities.

During assessment, TAs will offer and install a standardized, comprehensive set of measures to maximize customer bill savings. This DI service will provide immediate value to participants. This approach is effective for HTR populations: it is simple for customers to understand, easy for TAs to communicate and deliver, and helps gain trust and commitment to expand their sustainability journey.

Following the assessment, the TA will provide the customer a project plan that identifies incentives via a deep retrofit "Post-Direct Install" measure list addressing the highest value and most frequently encountered measure opportunities in small non-residential settings, along with demand response (DR) opportunities, and third-party/Community Choice Aggregator/Regional Energy Network (CCA/REN) incentives they can use to achieve savings. It will also educate customers on relevant financing programs. The TA will then facilitate agreed-upon follow-up projects for the customer. While the Program focuses on actions and measures that create bill savings, installation projects will contain qualified, deemed measures that result in claimable savings for SCE.

TAs will be the customer's energy concierge and manage project and customer Program applications. To reduce the customer's first cost, RI will pay the incentive to the TA, who will apply it toward the total project cost to minimize the customer's out-of-pocket costs. With customer consent, the TA will prepare and submit third-party/CCA/REN program applications to simplify the participation process. The Program will offer opportunities for ongoing engagement for continued energy and bill savings.

Maintaining SCE's integrity in how ratepayer funds are spent is a core priority. Resource Innovations will never allow double-dipping in the Program and will prevent it by:

- Requiring a signed attestation from TAs stating they are not using any other program's incentives for installed equipment.

- Closely collaborating with programs that have overlapping target customers and measure offerings to develop the most efficient method for preventing double-dipping.

- Helping coordinate customer participation in these overlapping programs so RI's team remains aware of customer interactions with these programs.

- Staying connected with SCE staff to leverage their knowledge and awareness of customer participation in other programs.

- Training TAs on the Program's requirements as they relate to double dipping and confirming they can work with customers to determine whether any measures have been installed as part of another program or within the time period of treatment.

Preventing Payments on Duplicate Measures

RI's Business Process Center has effective quality control procedures to verify the correct incentive amount is paid the correct number of times to the correct recipient. In 2021, RI processed and issued more than $166 million in incentive payments across more than 27,000 checks, with a 99.9% accuracy rate.

As RI processes rebates, all projects are thoroughly reviewed to verify that applications are complete and meet Program eligibility requirements and that incentive checks are paid in strict compliance with Program tariffs.

Duplicate incentives are best prevented at the database level. Whenever possible, RI validates serial numbers across programs to confirm that a piece of equipment has not been incentivized previously. Validation also occurs across fields, including account number, address, measure type, or any other fields required by SCE program rules. RI only pays incentives to participants who submit all required documentation and works with them to acquire missing information when necessary.

In addition to database validations, RI's processors may perform a secondary review based on factors such as application type or risk. This secondary review checks items such as payee, address, rebate amount, terms and conditions, signature, tax information, and third-party release of incentive (if applicable). Immediately prior to the batch process, the business process coordinator conducts batch-level validations for consistencies, including "Payee" spelling, address, savings and incentives, ZIP code according to U.S. Postal Service records, and length of tax ID numbers. Additionally, the project manager reviews each batch for compliance with Program requirements and approves batch incentives as appropriate.

Market Channel

The primary target market for the Program are customers located within DACs and underserved communities, as well as HTR customer businesses. Local TAs, CAGBN, and the CBO network will legitimize the Program to their constituents and assist with community outreach and engagement. CAGBN operates a network of 42 municipally run Green Business Programs throughout California and brings extensive relationships with CBOs (see below a list of programs and CBOs within SCE territory).

Additionally, the existing CBO partners are known and trusted by DACs and HTR customer businesses and have strong relationships within their local communities. These market partners will engage SMB customers, educate them about the Program and its benefits, and encourage participation. Leveraging the established networks of these market partners will cost-effectively

extend the Program's reach and enable the Program to serve all geographic areas in SCE's territory.

The TA network and licensed CBOs will make up the primary delivery channels for Program services. These networks will include contractors and distributors who specialize in, or have a specific interest in, serving SMB customers; provide quality service within their communities; and are diverse in both specialty (e.g., HVAC, refrigeration) and ownership structure (e.g., small businesses, diverse ownership designations, multi-site, and single site).

The Program is an action-driven Program. The outreach team will be focused on driving customers to take action through the DI service, performing follow-up projects by both leveraging the Programs' incentives as well as stacking incentives from other complementary programs, and responding to the behavioral-focused education provided by the team. The Program will make energy efficiency simple, accessible, relevant, and visible to participants.

City Green Business Programs	County Green Business Programs
City of Beverly Hills	Fresno County
City of Costa Mesa	Inyo County
City of Culver City	Kern County
City of El Segundo	Kings County
City of Glendale	Mono County
City of Hawthorne	Southern Half of Santa Barbara County
City of Irvine	Tulare County
City of Laguna Beach	Ventura County
City of Long Beach	
City of Manhattan Beach	
City of Santa Monica	
City of Torrance	
City of Ventura	

The CBOs include: the Community Environmental Council, South Coast Chamber of Commerce, Greater Los Angeles African American Chamber of Commerce, High Sierra Energy Foundation, Mammoth Lakes and Bishop Chambers of Commerce, Inyo Associates, Climate

Reality Project Orange County, Kern Green, Economic Development Collaborative, Sustainable Works, Los Promotores (Ventura and Santa Barbara), and the Westside Community Development Corporation (Ventura).

Additional Chambers, CBOs and Clubs include: Chinese American Chamber of Commerce of Orange County, Korean American Chamber of Commerce of Orange County, Koreatown Youth Community Center, Vietnamese American Chamber of Commerce of Orange County, Black Chamber of Orange County, Hispanic chamber of commerce of Orange County, National Latina Business Women Association, Orange County Turkish American Association, South Coast Chinese Cultural Association, Asian Business Association of Orange County, Orange County Hispanic Chamber of Commerce, Citizens Climate Lobby, Sierra Club Conservation Committee Orange County, Irvine Rotary Club, Greater Irvine Chamber of Commerce, Climate Action Campaign, Orange County Equality Coalition Non-profit organization, National Association of Women Business Owners, Laguna Beach Chamber & Visit Laguna Beach, Orange County chapter (NAWBO-OC), Orange County Community Foundation, One OC, One Step a la Vez, Score, Poder Popular Ventura County, Filipino Chamber of Commerce South Bay, South Bay Latino Chamber, Christopher Street West Association and Equality California.

3. Program Design & Best Practices

The Program is designed to overcome common barriers SMB customers face as defined by CPUC's ESJ Action Plan Goals 1, 2, and 5 and to provide participants with an experience that has an immediate impact on their business.

Barrier & ESJ Goal	Solution
Lack of Awareness, Digital Divide, and Technical *Goal 1*	Local TAs, CBOs, and CAGBN partners will engage SMB customers in equity communities and educate them about the Program and its many benefits. Serving as outreach for the Program — and using the project facilitation tool — also enables them to bridge the digital divide and educate customers about additional available programs. RI will provide Program training in coordination with SCE and statewide trainings to equip TAs to serve as technical resources for customers. Optionally, FCI can provide a mentor protégé paid training program to unemployed/underemployed community residents and train them in marketable skills for jobs within the industry.
Financial *Goals 1 & 5*	TAs will apply Program incentives to project invoices as an instant discount to drive down customer costs. They will provide and review a project plan that identifies programs customers can

	participate in to achieve greater savings. The plan will also identify available financing programs to help the customer overcome the first-cost barrier.
Social *Goals 1 & 2*	Partnerships with known and trusted CBOs will amplify the Program's messaging and help staff and TAs reach prioritized communities. CBOs will provide another avenue for workforce development. Customers can select their TA by searching for contractors who match their desired criteria (e.g., languages spoken, diverse ownership, Better Business Bureau ratings, customer reviews).
Incentive *Goals 1 & 5*	In addition to standard incentives, direct outreach by the CAGBN will encourage SMB customers to participate in the Program, providing access to local Program staff and funding sources. EI operates CAGBN, which has local Program coordinators throughout SCE's territory who will leverage existing relationships with CBOs to recruit HTR customer businesses and disadvantaged workers in DACs. CAGBN can also leverage existing funding from local and state governments for business recruitment, rebates, and CBO relationship-building.

iEnergy Technology Solution

The team will use iEnergy to facilitate DIs and audits; perform TA management, Quality Assurance (QA), measure verification, reporting and data management, and energy savings verification requirements; and complete Program close-out activities. iEnergy will streamline customer participation, maintain data integrity, and lower administrative costs.

Onsite Project Facilitation Tool

Resource Innovations will enable project facilitation via iEnergy OnSite mobile assessment tool, which streamlines site visits and enhances customer experience by providing a comprehensive report on all eligible measure opportunities, energy and bill savings, and facilitating easy Program enrollment all in the first visit. In addition, the assessment can be completed virtually, enabling the customer the flexibility to participate when it is convenient for them. OnSite also helps ensure project quality and data accuracy by:

- Prompting TAs to capture leads and confirm customer and site eligibility

- Capturing customer authorization and electronic signatures

- Reviewing all relevant customer systems and equipment, eligibility, and spaces to confirm project comprehensiveness

- Requiring and capturing all critical facility, project, and measure information

- Automatically calculating accurate energy savings, bill savings, and incentives

- Prompting TAs to submit projects, take photos, and capture required supporting documents to complete applications and scopes

- Providing TAs and SCE staff with virtual audit and inspection capabilities to connect with customers remotely, capture photos, and make notes in real time.

Program Tracking and Reporting. The Program will use iEnergy to collect, store, track, and report on data for the Program at the customer, funding, measure, project, and Program levels. Through the system's analytics and dashboards, RI will quickly view Program performance related to budgets and actual and projected savings, or dive into specific data to analyze project details and better understand trends.

Trade Ally Network Management via iEnergy. The RI team will establish, manage, and maintain the TA network using iEnergy's TA management module. The module's dashboards and reporting will provide insights on performance and enable us to track annual and year-over-year metrics (e.g., number of projects, energy savings) for individual TAs and the entire network. RI will use the platform to monitor TA licensure status and project performance, distribute Program updates, announcements, and post-training resources.

4. Innovation

The Program's innovative features include:

Going beyond claimable energy savings to support our SMB customers. Historically, program designs have limited or skipped participation by SMB customers due to barriers such as language, ability to make capital investments, landlord-tenant decision-making, and cost-effectiveness. These customers need Integrated Demand Side Management (IDSM) and/or EE programs that are designed based on their specific needs. By offering energy bill savings regardless of their regulatory status and including health and safety benefits, SMBs are more likely to take advantage of the Program and its benefits. The Program can also leverage measures like smart thermostats to help customers easily participate in Demand Response (DR) programs.

Extensive local, diverse partnerships with TAs, CBOs, and CAGBN programs that will appeal to the target market. These are not theoretical partnerships that RI is hoping to form — many of these organizations are known to RI, and RI is known to them. RI has active relationships with these market actors and will leverage them to hit the ground running when the Program is launched.

True integration with CAGBN programs to take SMB customers beyond energy savings. CAGBN leads the state in working with HTR customer businesses to create a vibrant green

economy. Certification standards will include the latest energy efficiency practices and retrofits for SMB customers, beyond lighting. Businesses enrolled in the CAGBN are motivated to participate in energy efficiency upgrades to achieve certification and receive public recognition and promotion. Additionally, leveraged funding for this Program comes from local and state sources, providing added benefit to SMB customers participating in the Program, including additional rebates and free technical assistance.

A train-the-trainer model to increase TA business sustainability and reduce implementation costs. In The Ortiz Group's train-the-trainer program, each TA will identify one individual within their organization who will receive professional train-the-trainer support from RI's team to build their in-house capacity and incorporate energy efficiency and quality service into their businesses. Training curriculum shall, at a minimum, include:
- Program overview, including policies and procedures
- Roles and responsibilities
- Technical training (including onsite Project Facilitation Tool "iEnergy")
- Customer Qualification Process
- Measure List Orientation (Direct Install versus Post-Direct Install measures)
- Program Participation Process
- Leveraging of other portfolio offerings

Cross-training and partnerships of TAs to enhance the customer experience. Contractors often focus on one broad category, such as electrical or HVAC. RI will reach out to TAs who have demonstrated their ability to perform comprehensive energy projects, but RI will also facilitate cross-training for contractors so they can install all direct install measures in a single visit, greatly enhancing the customer experience. RI will also establish partnerships between TAs so that, for example, both a lighting-focused TA and an HVAC-focused TA would visit the customer together and install all eligible direct install measures in a single visit.

Enhanced project speed and simplicity through the web-accessible Onsite mobile assessment tool. The OnSite mobile assessment tool streamlines the Program application process, facilitates a targeted walkthrough assessment, and helps TAs identify eligible measures in a comprehensive manner. The tool allows TAs to offer both on-site and live-streamed virtual energy assessments based on participant preference. It will also identify opportunities to leverage complementary programs that provide additional funding, further reducing the customer's initial cost. For customers, the project facilitation tool provides a clear pathway to Program participation and includes project details, financing options, return-on-investment (ROI) information, and clear next steps so they can make informed decisions.

Market transformation using TA apprenticeships. This Program model hinges on satisfactory and successful interactions between customers and TAs. RI coaches TAs to incorporate energy efficiency and quality services into their business and trains them to effectively engage, motivate, and complete customer projects. This level of training enables the RI team to maintain a robust pipeline and achieve Program goals. To leverage existing offerings and reduce Program

costs, RI will coordinate trainings with local SCE trainings and the statewide workforce education and training program.

Workforce development efforts to engage disadvantaged workers. FCI will be the inaugural TA partner serving the greater Los Angeles area and Orange County. Additional TAs will be recruited to serve additional DACs and HTR customers. FCI will operate the workforce development initiative, working closely with CBOs to recruit disadvantaged workers. Candidates will enter a job training program that will provide them with new skills and experience and facilitate job placement into well-paying positions in the clean energy industry. These enhancements could include opportunities for disadvantaged workers to get certified through affiliated educational organizations (e.g., community colleges, local municipal programs), paid internships, and/or scholarships.

Key Differences for More Successful Outcomes

- Includes a targeted measure mix that will lead to significant bill savings and other benefits, such as increased health, safety, and comfort. Because this is an equity program, it is designed with the end user in mind and is not bound by some of the parameters that govern resource acquisition programs, such as using only active, cost-effective measures.

- Because project cost-effectiveness is not required, the Program can serve all customers effectively — even the smallest and most remote businesses. Previously, the lack of measures available to SMB customers made it cost-ineffective and difficult to recruit TAs to serve this segment. Now with an expanded measure offering, it will be feasible to serve these customers and help them experience bill savings.

- Invests heavily in localized outreach utilizing the network of Green Business Programs, CBO funding, and TAs to a diverse, HTR population, which is key to success in order to effectively serve sensitive communities.

- Provides customers with a central resource to help leverage funding and technical resources from other programs, so they can be served comprehensively without having to become program experts themselves.

- Leverages a closed TA network that requires TAs to be vetted and approved for Program participation. This allows local contractors to expand their business and grow their customer base in a sustainable manner.

5. Metrics

Overall Portfolio Level

Common Problem	Final Common Metric or Indicator	Category: Metric or Indicator
Capturing Energy Savings	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Metric
Disadvantaged Communities	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in DACs	Metric
Hard-to-Reach Customers	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard- to-reach markets	Metric
Cost per unit Saved	Levelized cost of energy efficiency per kWh, therm, and kW (use both TRC and PAC)	Metric

Commercial

Common Problem	Final Common Metric or Indicator	Category: Metric or Indicator
Capturing Energy Savings	First-year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) First-year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage	Metrics
Greenhouse Gas Emissions	Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis	Metric
Penetration of energy efficiency programs in the eligible market	Percent of participation relative to eligible population for small and medium customers.	Metrics
Program Satisfaction	Improvement in customer satisfaction Improvement in trade ally satisfaction	Indicator
Customers served	Total equity-targeted customers served by Equity Program	Metric
	Equity - Market support (ex: education, information, training, technical support, etc.)	Indicator
	Equity - resource acquisition (ex: energy saving action, etc.)	Indicator

	Total # of companies/non-profits served by the Equity Segment programs	Metric Indicator
Companies Served	Equity - Market support (ex: education, information, training, technical support, etc.)	Indicator
	Equity - resource acquisition (ex: energy saving action, etc.)	

Public

Common Problem	Final Common Metric or Indicator	Category: Metric or Indicator
Capturing Energy Savings	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	Metrics
Greenhouse Gas Emissions	Greenhouse gasses (MT CO2eq) based on net lifecycle kWh and Therms savings, reported on an annual basis, incorporating average fuel/technology mix	Metric
Depth of Interventions	Average percent energy savings (kWh, kw, therms) per project building or facility Average annual energy savings (kWh, kw, therms) per project building floor	Indicator
Penetration of energy efficiency programs and benchmarking in the eligible market	Percent of Public Sector accounts participating in programs	Metric
	Percent of estimated floorplan area (i.e., ft^2) of all Public Sector buildings participating in building projects— estimate within +/-15% of sector-wide building area, +/-5% of project building area	Indicator
Investment in Energy Efficiency	Total program-backed financing distributed to Public Sector customers requiring repayment (i.e., loans, OBF)	Indicator
Energy Intensity	Average energy use intensity of all Public Sector buildings	Metric
Customers Served	Total # equity-targeted public facilities and equipment or community projects served by the Equity programs	Metric
	Equity - Market support (ex: education, information, training, technical support, etc.)	Indicator
	Equity - resource acquisition (ex: energy saving action, etc.)	Indicator

Industrial

Common Problem	Final Common Metric or Indicator	Category: Metric or Indicator
Capturing Energy Savings	First year annualized and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in industrial sector	Metric
Greenhouse Gas Emissions	Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual Basis	Metric
Penetration of energy efficiency programs and diversity of participants	Percent of participation relative to eligible population for small and medium customers	Metric
New Participation	Percent of customers participating that have not received an incentive for the past three years, annually, by small, medium and large customer categories	Indicator
Baseline/Consumption Reduction	Reduction in consumption (proposed by SCE and SDG&E)	Metric
Customers Served	Total equity-targeted customers served by Equity Program Industrial – equity market support (ex: education, information, training, technical support, etc.) Industrial – equity resource acquisition (ex: energy saving action, etc.)	Metric Indicator Indicator

Agricultural

Common Problem	Final Common Metric or Indicator	Category: Metric or Indicator
Greenhouse Gas Emissions	Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis	Metric
Penetration of energy efficiency programs and diversity of participants	Percent of participation relative to eligible population for small and medium customers. For the purpose of the foregoing: (1) small customers are those customers that have peak usage of less than 50 kW per month, (2) medium customers are those customers that have peak usage greater than 50 kW per month and less than 250 kW per month.	Metric
Customers Served	Total equity-targeted customers served by Equity Program	Metric

	Agricultural – equity market support (ex: education, information, training, technical support, etc.)	Indicator
	Agricultural – equity resource acquisition (ex: energy saving action, etc.)	Indicator

Portfolio Level – All Equity Target Participants

Common Problem	Final Common Metric or Indicator	Category: Metric or Indicator
Contractors/Workers Served	Total # of contractors/workers served by Equity Segment Programs	Metric Indicator
	Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of contractors and/or workers that are disadvantaged workers or otherwise underrepresented, who are directly involved in implementing Equity Segment programs	
	Total # (indicator for all) [and % (metric for PAs with no relevant legal restriction)] of companies/non-profits who are Diverse Business Enterprises (DBE) or otherwise underrepresented (e.g., BIPOC-owned) with contracts to implement Equity Segment programs	Indicator
Bill Savings	Expected first-year bill savings in total $ for equity-targeted program participants	Metric
Greenhouse Gas Emissions (Equity All)	Equity All – First Year GHG Net reductions (tons)	Indicator
	Equity DAC Participants – First Year GHG Net reductions (tons)	Indicator
	Equity HTR Participants – First Year GHG Net reductions (tons)	Indicator
	Equity underserved – First Year GHG Net reductions (tons)	Indicator
Depth of Interventions	Total first-year ex-ante savings for all sectors by participant type (net kWh, net kW, net Therms)	Indicator
	Equity DAC Participants – Total first- year ex-ante savings (net kWh, net kW, net Therms)	Indicator
	Equity HTR Participants – Total first- year	

	ex-ante savings (net kWh, net kW, net Therms)	Indicator
	Equity underserved – Total first-year ex-ante savings (net kWh, net kW, net Therms)	Indicator
Community Engagement	Community engagement activities during program design and to identify community needs and solutions	Indicator
	Community engagement activities during program implementation	Indicator
	Community engagement activities during program assessment	Indicator
Energy, Climate, and Non- Energy Benefits	Energy and climate benefits (monetized within TSB)	Indicator
	Health - "non-energy benefits" in "counts of participants receiving this benefit" until we can monetize. Reporting at least one of: Indoor air quality, Outdoor air quality (e.g., reduction in emissions from gas combustion appliances that vent to nearby outdoor air), Reduction in interior contaminants/biologics, other	Indicator
	Comfort - "non-energy benefits" in "counts of participants receiving this benefit" until we can monetize. Reporting at least one of: reduced drafts, quieter interior, managed interior temp, other	Indicator
	Safety -"non-energy benefits" in "counts of participants receiving this benefit" until we can monetize. Reporting at least one of: improved safety of appliances, other	Indicator

Key Performance Indicator Schedule

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 of the Agreement	In accordance with Article 5 of the Agreement	Track progress towards achieving annual program savings goals
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 Article 5 of the Agreement	Track progress towards achieving annual program savings goals
Schedule Adherence	Expected Energy Savings vs. Ex Ante Energy Savings; Expected Demand Savings vs. Ex Ante Demand Savings	Expected performance vs. actual performance	In accordance with Article 5 of the Agreement	In accordance with Article 5 of the Agreement	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 ability to	Report of overall customer satisfaction	In accordance with Section	In accordance with Section	Reflects ability to deliver

	respond to customer needs, number of complaints, resolution of complaints, flexibility, reporting accuracy and timeliness	rating of 90% for satisfied or very satisfied	9.05(f) of the Agreement	9.05(f) of the Agreement	Program at a high level of customer satisfaction
Email	Unsubscribes or opt outs	The average unsubscribe rate across all email campaigns			
	Spam (Complaints	The average spam or complaint rate across all email campaigns			
Direct Mail	Unsubscribes or opt outs				
Door – to - Door	Unsubscribes or opt outs				
Safety Ratings	Maintain ISNetworld (ISN) grade of B or better	ISN grade	ISNetworld	Annually	Validate adherence to maintaining a culture of workplace safety
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 – target 35%	As defined in Section 4.05 of the Agreement	In accordance with Section 4.05(c) of the Agreement	Validates that the Diverse Business Enterprise commitment is being met
Disadvantaged Worker	Total number of workers that meet the CPUC definition of disadvantaged worker and are directly involved in implementing the program or installation of measures through the program	Quarterly reporting of total # of disadvantaged workers and total # DAC workers (determined by employee's home address zip code) for Resource Innovations, Trade Allies and each subcontractor	Implementer Survey Administration	Quarterly	Validates the involvement and recruitment of disadvantaged workers

Hard-to-Reach Customers	Evaluates the number of program participants that meet the HTR definition	Target of 15% of the remaining population of participants to be HTR	Per CPUC definition	Quarterly	Validates focus on equity customers
Disadvantaged Communities	Evaluates the number of program participants within DAC	Target of 75% of participants from DACs	As identified in CALEnviro Screen	Quarterly	Validates focus on equity customers
Non-Energy Benefits	Evaluates the number of participants that report receiving non-energy benefits such as health, comfort and safety.	Target of 75% of participants reporting receiving non- energy benefits	Implementer Survey Administration	Quarterly	Validates the added benefits of measures such as improved lighting or indoor air quality
Resource Measure Install Pass Rate	Evaluates quantity and quality of measure installation per SCE inspections	Target of 95% or greater pass rate	Per pre and post inspection findings	Monthly	Validates quality of installations
Sustainability Ratings	Evaluates the Implementer against environmental and sustainability practices and metrics.				Demonstrates Implementer's commitment to sustainability
Non-Resource Measure Projects initiated	Number of Non-Resource Measure Projects and Technology Support Projects accepted by SCE under Article 5 of Agreement	Number of Non-Resource Measure Project Plans approved by SCE	Project Plan		A project pipeline aligned with Program objectives.
Hosted Outreach events	Number of Outreach Events organized and hosted.	Number of Outreach Events Project Plans approved by SCE	Program tracking data		
Number of Energy Assessments initiated	Number of Energy Assessments Projects accepted by SCE under Article 5 of Agreement	Number of Energy Assessments Project Plans approved by SCE	Program tracking data		
Number of Workforce Education training projects initiated	Number of Workforce Education training Projects accepted by SCE under Article 5 of Agreement	Number of Workforce Education training Project Plans approved by SCE	Program tracking data		
Non-Resource Measure Install Pass Rate	Evaluates quantity and quality of non- resource measure installation per SCE inspections	Target of 95% or greater pass rate			Validates quality of installations

Resource Measures spend performance with Hard-to- Reach Customers and Disadvantaged Communities	Total funds for Resource measures spent through Projects in Hard-to- Reach Customers and Disadvantaged Communities.	Cumulative-to- date, spend achieved on Hard-to-Reach Customers and in Disadvantaged Communities.	Program financial tracking data		Measures compliance with legislative goals
Non-Resource Measures spend performance with Hard-to- Reach Customers and Disadvantaged Communities	Total funds for Non-Resource measures spent through Projects in Hard-to- Reach Customers and Disadvantaged Communities.	Cumulative-to- date, spend achieved on Hard-to-Reach Customers and in Disadvantaged Communities.	Program financial tracking data		Measures compliance with legislative goals

6. For Programs Claiming To-Code Savings

a. Where to-code savings potential resides

The following measures will claim to-code savings:

- Auto door closers, walk-in (SWCR005-03)

- Pipe insulation (SWWH017-02)

- Smart outlets and timers for vending machines (SWAP011-03)

- Variable Frequency Drive (VFD) motors (SWHC018-03)

- Electronically Commutated Permanent Magnet Motors (ECM) retrofit, walk-in cooler or freezer (SWCR004-02)

b. Equipment types, building types, geographical locations, and/or customer segments that promise cost-effective to-code savings

Based on estimates developed by Resource Innovations, the to-code measures with the highest potential impact are pipe insulation and auto door closers for walk-in freezers. The most cost-effective measures are expected to be VFD motors, auto door closers for walk-in freezers, and pipe insulation. Restaurants and retail stores are the building types that are expected to install the largest quantities of these measures.

c. Barriers that prevent code-compliant equipment replacements

Due to common characteristics of small businesses, such as leased facilities, lack of capital to invest, unfamiliarity with energy efficiency opportunities, and competing priorities, many small businesses have neglected their equipment, which leads to more inefficiency in their performance. This Program is designed to target these types of customers to ensure their below-code equipment is brought up to code or exceeds code by providing financial resources and energy efficiency education.

d. Why natural turnover is not occurring within certain markets or for certain technologies

Natural turnover is occurring slowly for small businesses for the same reasons listed above—leased facilities, lack of capital to invest, unfamiliarity with energy efficiency opportunities, and competing priorities. The to-code measures that the Program is incorporating are ones that are more proactive than reactive. Pipe insulation, auto door closers, smart outlets and timers, and VFDs are not required to maintain the operations of a facility. The addition of these measures improves performance but requires investment by the business. ECMs are not visible and may perform poorly or not at all but may not be noticed by the customer until a major maintenance issue occurs. These technologies improve energy efficiency by proactively implementing a project that will either prevent problems or improve operations. Without intervention, the

customer could continue to operate these facilities without any change, therefore not driving natural turnover while paying for more energy than necessary.

e. Program interventions that will effectively accelerate equipment turnover

TAs will perform comprehensive energy assessments in order to identify and educate the customer on opportunities to reduce energy costs by proactively installing measures that reduce the usage of their equipment. The TA will also perform direct installation services to replace the equipment at no or a low cost to the customer. By providing a turnkey experience, the customer will receive services faster with less effort to schedule and oversee the installation. The process for installation will also have minimal impact on operations, which doesn't impact the ability of a customer facility to stay open.

7. Pilots

N/A

8. Workforce Education & Training

The Program will embed workforce development activities into its design and implementation in partnership with the following TAs:

California Green Business Network

In previous engagements, the network of Green Business Programs in the CAGBN has employed underserved individuals from green job training programs, community colleges, and CBOs focused on workforce development. These individuals have traditionally been program employees, interns (many of whom became employees), or contractors. CAGBN is affiliated with Workforce Development Boards across SCE's territory and understands where to find individuals who fit the required training and are most in need of work. For the Program, CAGBN will:

•   Recruit individuals from these same training programs that have been used in the past, especially in underserved communities or DACs.

•   Leverage CBOs to support their efforts in employing individuals with the right culture and language fit for a particular community.

FCI Management

FCI will operate the Program's workforce development initiative, working closely with CBOs to recruit disadvantaged workers. Candidates will enter a job-training program that will provide them with new skills and experience and facilitate job placement into well-paying positions in the clean energy industry. The details of the workforce development initiative will be included in the Workforce Development Plan deliverable.

Optional Enhancements

FCI offers an educational path to lighting or HVAC certification through an accredited training program in an affiliated community college, local CBO training program, or local municipal training program. Participants would work towards achieving their educational requirements and the required number of hours working with a contractor to take the test for state certification. FCI would partner with CBOs to identify individuals to participate in the training program and provide mentorship. Depending on the available funding, they could also provide support with tuition and books.

FCI can also provide support to participants who are interested in other careers within the industry, such as conducting energy audits or providing back-office support. Participants would receive classroom-based education as well as on-the-job training with one of their experienced professionals.

To reach individuals who have the residency, aptitude, and desire to receive certification and become licensed contractors, it is important to conduct focused outreach. FCI will conduct market surveys in communities to identify key community market actors, influencers, and organizations (such as faith-based organizations and local elected officials).

9. **Workforce Standards**

   a. **HVAC Measures**

      i. Certain HVAC measures within the Program are likely to exceed the incentive thresholds set within D.18-10-008, and therefore will require that all TA employees involved with the installation of those measures meet the CPUC's specified workforce standards. Resource Innovations will coordinate with HVAC training and education organizations to identify contractors that have the CPUC-mandated certifications and provide resources to other TAs as to how they can obtain the required certifications. For all projects and for each measure, installed, modified, or maintained in a non-residential setting where the project is seeking an energy efficiency incentive of $3,000 or more, RI shall ensure that each worker or technician involved in the project meets at least one of the following criteria:

1. Enrolled in and/or completed an accredited HVAC apprenticeship

2. Completed more than five years of work experience at the journey level per the California Department of Industrial Relations definition, passed competency tests, and received specific credentialed training

3. Has a C-20 HVAC contractor license issued by the California Contractor's State Licensing Board

    b. **Advanced Lighting Control Measures**
        i. It is expected that lighting controls will be required for some projects, such as high/low bay LED lighting installations. In accordance with CPUC requirements, for all lighting projects and for each lighting measure eligible for an energy efficiency incentive of $2,000 or more, RI will ensure that all workers or technicians involved in the project are certified by the California Advanced Lighting Controls Training Program (CALCTP).

Resource Innovations will verify that the TA employees involved with these projects meet or exceed the CPUC standards by tracking certifications and training through the iEnergy software platform. Participating TAs will be required to provide documentation of the applicable licensing, certifications, or training for all participating staff. Through iEnergy, RI will be able to identify the TAs and staff that meet the HVAC workforce standards and support them in maintaining or achieving the necessary certifications and training to help ensure the highest quality installations.

10. Disadvantaged Worker Plan

The RI team will collect information on disadvantaged workers employed by the TA partners and subcontractors by sending voluntary surveys to them for distribution to their workforce on an annual basis to track their inclusion and training efforts. Metrics related to the participation of disadvantaged workers within the Program will be tracked and reported on a quarterly basis.

Supporting Documents

1. Program Manual

The Program Manual will be provided as a separate document

2. Program Theory & Program Logic Model
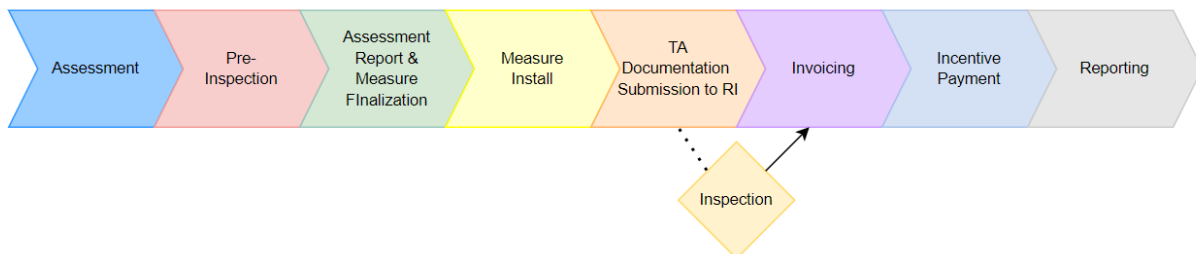
Program Theory

The Program design enables success by driving customer-facing benefits instead of those targeted by traditional DSM programs (e.g., TRC, NTG, etc.), hence dramatically improving the provision of services to the intended customer categories. Customer Bill Savings is a key metric, as well as other non-energy benefits realized by the customer as a result of Program services; however, energy savings claims will also be captured through eligible projects as they occur. In addition, focus will be given to recruitment for the Program's TA network from within DAC and HTR communities to leverage relationships and trust established between these groups as well as to extend Program benefits further into these communities.

Ultimately, this Program will increase activity among underserved SMB customer groups and their communities with the goal of facilitating long-term engagement between the DACs and HTR customers, the TAs that support them, and SCE.

Logic Model

BARRIERS	ACTIVITIES to address barriers	OUTPUT (results / deliverables)	OUTCOMES		
			Short-Term (12 months)	Mid-Term (24-36 months)	Long-Term (36+ months)
Program Complexities	• Provide DI measures at no, or low, cost to the customer	• Simplified DI measures list • Incentives for highest value measures • Measure catalogue in Onsite Assessment Tool • Direct buy down of project costs	• Immediate realized benefits through streamlined process • Enhanced customer trust and awareness of program offerings • 75% or more participants are from DAC locations • Well-trained, experienced TA and CBO network to deliver program services • Targeted average of 5% in bill savings, with a priority for peak demand savings	• Delivery of cost efficient energy and HCS benefits • Significantly increased MSB engagement and participation in DACs/HTRs • Improved TA presence and engagement with DAC and HTR customers • Improved customer satisfaction • Increased program awareness and participation in IDSM / peak load reduction opportunities	• Achieve deep penetration with customers in DAC / HTR communities with increased HCS and resiliency as well as energy benefits • ESJ Goal 5: Enhanced outreach and public participation by ESJ communities in CPUC's decision-making process and benefit from CPUC programs • Ensure compliance with all CPUC policies while maintaining an element of nimbleness and flexibility that can ensure high stakeholder satisfaction Increase adoption rates of EE and IDSM programs that result in decreased GHG emissions in DACs
Difficult and Expensive to Reach and Serve	• Leverage CBOs & local CAGBN coordinators	• Engaged, trusted program coordinators • Localized, engaged expertise • Increased, awareness in energy efficiency benefits • Expanded awareness of other programs such as IDSM, EVs, etc. • High customer satisfaction			
Lack of Awareness, Incentive, and Technical Knowledge	• Conduct targeted marketing and outreach in communities considered DACs / HTRs	• Expanded, localized customer marketing and outreach specific to the needs of DACs/ HTRs/prioritized areas • Messaging that speaks to the customer where they are (i.e., high fire areas, multilingual, segment specific)			
Lack of Time and Trust	• Deploy a locally-based trade ally network	• Pre-vetted, diverse Trade Ally network • Assessment tools provided to TAs • Provide on-going training, QA/QC, & inspections • Allow customer to choose TAs • Concierge level service to facilitate streamlined program participation			
Split Incentive	• Develop tools to synthesize and facilitate participation in relevant DSM programs	• Offer energy assessments at no cost to the customer • Post-assessment, provide customer with optimized project plan that details project savings potential, incentive opportunities, other program options, and available financing tools • Offer opportunities for ongoing engagement e.g., CAGBN certification			
Lack of Capital / First Cost	• Provide financing options	• Standardized on-bill, financing and CHEEF small business program offerings			

3. Resource Innovations Program Process Flow Chart

4. Incentive Tables for Measures, Measure Packages

Measures	Resource or Non-Resource	Direct Insall or Post-Direct Install	Measure Package ID	Direct Install Payment per Unit	Incentive per Unit	Measure Unit	URL Link for Resource Measures
Smart thermostats	Non Resource	Direct Install	SWHC039-06	$315.00		Each	
LED lamps (int and ext) pin and screw-based lamps	Non Resource	Direct Install	PGECOLTG165	$10.50		Each	
Bluetooth smart power strips	Non Resource	Direct Install	SWAP010-01	$89.00		Each	
Occupancy sensing wall switches	Non Resource	Direct Install	SCE13LG025.2	$155.00		Each	
Room air purifiers	Non Resource	Direct Install	SWAP008-02	$419.50		Each	
LED troffer kits 2X2	Non Resource	Direct Install	SWLG012-01	$175.00		Each	
LED troffer kits and fixtures 2X4	Non Resource	Direct Install	SWLG012-01	$205.00		Each	
LED recessed downlight retrofit kit	Non-Resource	Direct Install	SWLG012-01	$25.00		Each	
Type A LED tubes (not B&C listed)	Resource	Direct Install	SWLG009-04	$15.50		Each	https://www.caetrm.com/measure/SWLG009/04/

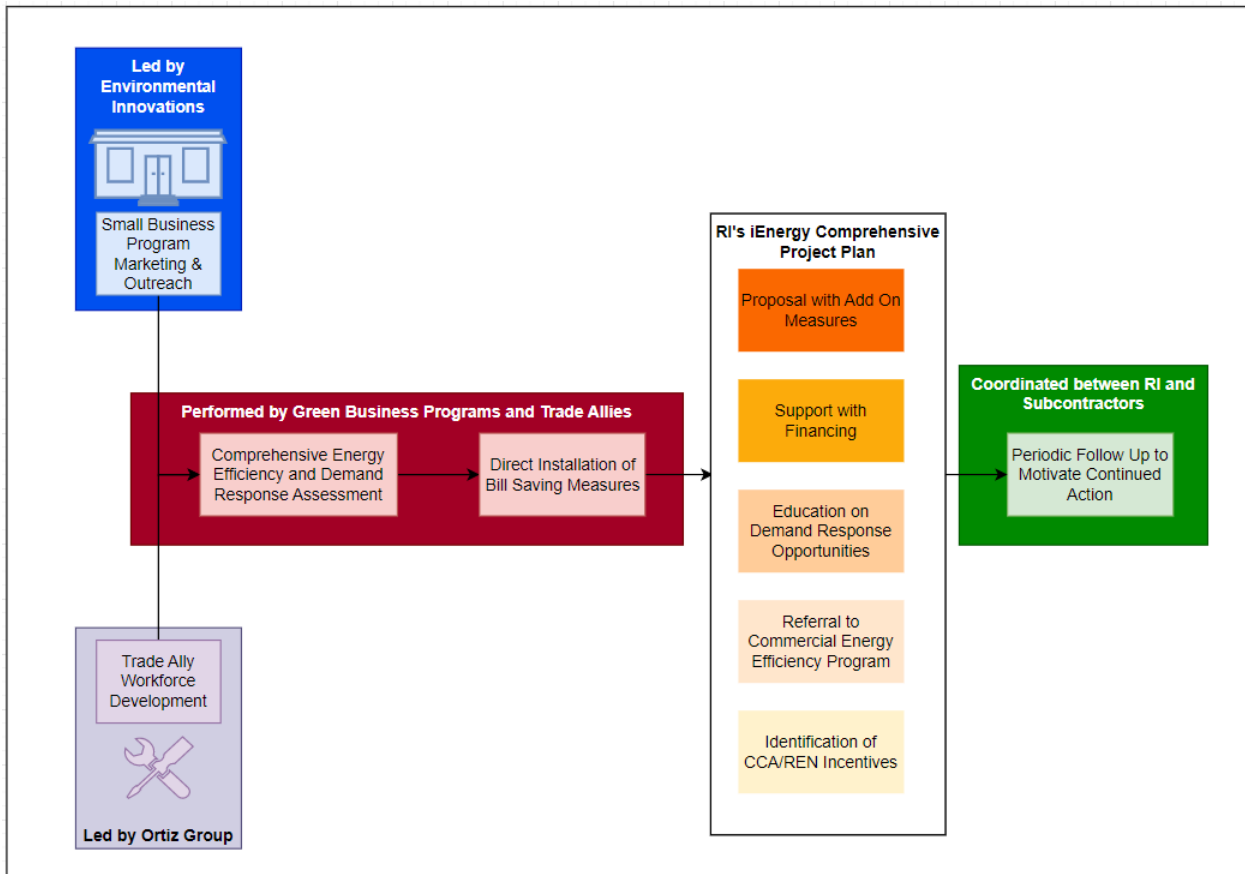|							
Faucet aerators	Resource	Direct Install	SWWH019-04	$14.45		Each	https://www.caetrm.com/measure/SWWH019/04/
Pre-rinse spray valves	Resource	Direct Install	SWFS013-02	$117.24		Each	https://www.caetrm.com/measure/SWFS013/02/
Auto door closers - Freezer	Resource	Direct Install	SWCR005-03	$350.00		Each	https://www.caetrm.com/measure/SWCR005/03/
Pipe insulation	Resource	Direct Install	SWWH017-02	$11.50		Per Len-ft	https://www.caetrm.com/measure/SWW017/04/
Smart outlets and timers for vending machines	Resource	Direct Install	SWAP011-03	$214.00		Each	https://www.caetrm.com/measure/SWAP011/03/
2-Lamp Linear LED Lamp Hardwired retrofit	Resource	Post Direct Install	SWLG018-03		$20.00	Each	https://www.caetrm.com/measure/SWLG018/03
3-Lamp Linear LED Lamp Hardwired retrofit	Resource	Post Direct Install	SWLG018-03		$30.00	Each	https://www.caetrm.com/measure/SWLG018/03
Interior LED Fixtures - General	Non-Resource	Post Direct Install	SWLG012-01		$75.00	Each	
LED Fixture Retrofit Kit	Non-Resource	Post Direct Install	SWLG012-01		$50.00	Each	
Refrigerated Display Lighting	Non-Resource	Post Direct Install	SCE13LG098.4		$2.00	Len-ft	
Window Film	Non-Resource	Post Direct Install	SCE13HC002.2		$5.00	Glass square foot	
Auto door closers - Cooler	Resource	Post Direct Install	SWCR005-03		$100.00	Each	https://www.caetrm.com/measure/SWCR005/03/
Evap fan coolers for walk in	Resource	Post Direct Install	SWCR004-02		$50.00	Each	https://www.caetrm.com/measure/SWCR004/02/

Indoor Low Bay Lighting: LED Fixtures	Resource	Post Direct Install	SWLG011-04		$75.00	Fixture	https://www.caetrm.com/measure/SWLG011/04/
Heat pump replacing a gas furnace	Resource	Post Direct Install	SWHC046-02		$100.00	CAP-Tons	https://www.caetrm.com/measure/SWHC046/02/
Heat pump replacing a heat pump	Resource	Post Direct Install	SWHC014-03		$100.00	CAP-Tons	https://www.caetrm.com/measure/SWHC014/03/
Electric to Electric Water Heater	Resource	Post Direct Install	SWWH031-02		$500.00	Each	https://www.caetrm.com/measure/SWWH031/02/
ECM Motors for display cases and walk ins	Resource	Post Direct Install	SWCR003-02		$50.00	Each	https://www.caetrm.com/measure/SWCR003/02/
Variable Frequency Drive Motors	Resource	Post Direct Install	SWHC018-03		$50.00	Rated-HP	https://www.caetrm.com/measure/SWHC018/03

5. Quantitative Targets

Please refer to the quantitative targets in the CW2274752 Resource Innovations EE Local SMB Equity contract.

![Resource Innovations logo](ri resource innovations)

6. Diagram of Program

Diagram contents:

Led by Environmental Innovations
- Small Business Program Marketing & Outreach

Performed by Green Business Programs and Trade Allies
- Comprehensive Energy Efficiency and Demand Response Assessment
- Direct Installation of Bill Saving Measures

Trade Ally Workforce Development
- Led by Ortiz Group

RI's iEnergy Comprehensive Project Plan
- Proposal with Add On Measures
- Support with Financing
- Education on Demand Response Opportunities
- Referral to Commercial Energy Efficiency Program
- Identification of CCA/REN Incentives

Coordinated between RI and Subcontractors
- Periodic Follow Up to Motivate Continued Action

7. Evaluation, Measurement & Verification

Project Verification and Post Inspection

The Resource Innovations team will implement various protocols to verify the accuracy of reported measure installations for energy efficiency measures as well as health, comfort, and safety measures. The verification process starts at project submission, when TAs will submit customer information, baseline condition equipment details, measures installed including geotagged photographs, copies of invoices, number and cost of units, incentives applied, and dates of installation. Additional data will be collected at this time in accordance with the requirements of each specific measure package. RI will capture this information in a program management platform, which will prompt TAs to submit the necessary general project information as well as the measure-specific requirements that come from the measure packages. The submitted information is then easily accessible to reviewers and inspectors who are conducting QA/QC and virtual or on-site inspections. A QA/QC checklist will be developed for each measure based on the specific data collection requirements described within the measure package.

An important part of the verification process is the post-installation inspection. Inspections will verify measure eligibility, installation, types and quantities of equipment, and quality of commissioning by completing checklists based on established procedures and criteria. For example, for LED lighting installations, in addition to the general information listed above, RI will confirm that the new lighting meets color rendering index (CRI) standards and appropriate light output (lumens) for the application. Lower CRI values and lumen output may be acceptable for storage rooms and stairwells, while higher values would be appropriate for display lighting. Projects will be selected for inspection based on a randomized sampling or on past performance of the contractor. RI will work with the customer and/or the TA to resolve any discrepancies, if applicable

Resource Innovations will use iEnergy OnSite to streamline the post-installation inspection process. The tool captures real-time data directly from the program management platform and enables appropriate changes in the system while inspectors are conducting inspections. The project facilitation tool has an online checklist to validate projects and uses specific criteria to conduct inspections based on each project's approved measures.

Inspectors will finalize, record, and track all QA findings and any necessary project remediations. The Resource Innovations team will use information that is collected during the post-inspection to inform best practices, develop or modify trainings, and inform Program design changes. The team will also use this information to mentor TAs so they can:

- Install the Program's comprehensive measures

- Provide high-quality services

- Complete projects per Program specifications

Verification and Validation of Non-Resource Activities

Non-resource activities include:

- Providing energy education and/or site assessments for SMB customers

- Performing direct installation of energy, health, and safety measures

- Coordinating customer participation in follow-up projects, including their participation in complementary programs

- Providing TA training and oversight

- Leading workforce development activities focused on disadvantaged workers

The Program leverages a team of TAs to serve qualifying SMB customers, including those in targeted, underserved communities. Once a TA has established contact with an eligible customer, they will gauge the customer's interest in participating in the Program. The TAs will be trained to highlight the benefits of installing DI and Post-DI measures to improve access to energy efficiency for SCE's SMB customers.

For customers that show interest in DI and/or Post-DI measures, the TAs will complete a site assessment that focuses on key energy efficiency opportunities, including HVAC and lighting, as well as health, comfort, and safety measures such as pipe insulation and room air purifiers. With the customer's approval, DI measures will be installed during the same visit, and Post-DI opportunities will be referred to qualified contractors/TAs for a follow-up visit. It is expected that all contacted customers, regardless of whether DI measures are installed, will be provided with targeted energy education, including collateral that has been developed for the specific customer segment, such as retail, food stores/convenience stores, and restaurants. Energy education materials will include a list of complementary programs that customers can consider, and TAs will be available to coordinate customer participation in the other programs. Customers receiving energy education materials, as well as the subset of customers receiving a site assessment, will be entered into the project facilitation tool by the TAs and will be available for validation purposes.

Resource Innovations provides TAs with initial training and ongoing mentorship so that SCE customers receive quality project installations. The initial TA training Program provides TAs with extensive Program and measure installation training, education, and sales assistance to equip them for success in the field. The mentorship program provides TAs with ongoing training, support, and hands-on technical assistance. This includes Program onboarding, iEnergy systems training, ride-alongs, and "train the trainer" working sessions throughout the lifecycle of the Program. RI will work with the TAs and provide coaching on sales and work practices; verify measure installation skill proficiency and adherence to Program specifications; and offer feedback that will increase their efficiency in the field and increase the TAs' conversion rates. By reinforcing Program training in the field, RI verifies that TAs understand and adhere to the Program requirements while simultaneously increasing customer satisfaction with SCE and the Program and reducing the post-installation verification costs.