

A photograph of a man in a brown beanie and blue jacket smiling in a computer lab. In the background, a woman in a blue turtleneck is working at a computer. A monitor in the foreground displays a 'YOUTH PROGRAM' sign.

Simplified Savings

Southern California Edison Local Small & Medium Business Equity Program

Date: 9 • 28 • 2023



Agenda



Program Overview



Customers: Eligibility, Targeting & Benefits



Timeline

A Program Designed To Meet Non-Residential Equity Customers' Unique Needs



Targeted measure mix will lead to significant bill savings and other Non-Energy Benefits. Equity programs, by nature, allow us to design solutions that put the end user first.



Simplified Savings can serve all customers comprehensively — even the smallest and most difficult-to-engage businesses.



Invests heavily in localized outreach to diverse, hard-to-reach customers, which is key to effectively serving sensitive communities.



Provides customers with a concierge level of service 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 trade ally network, allowing local contractors to expand their business and grow their customer base in a sustainable manner.

Summary

The Program focuses on delivering meaningful energy bill savings to Southern California Edison's (SCE's) Small to Medium Business (SMB) Customers, including Commercial, Industrial, Agricultural, and Public customers. The target customers are those residing in Disadvantaged Communities (DACs) or who qualify as Hard-to-Reach (HTR). Customers will be provided energy education, bill analysis, audits, no-cost direct install (DI) measures, incentives for higher impact measures, as well as health, comfort, and safety benefits.

Filed Name:

- Local Small & Medium Business Equity Program

Program Name and Branding:

- Simplified Savings

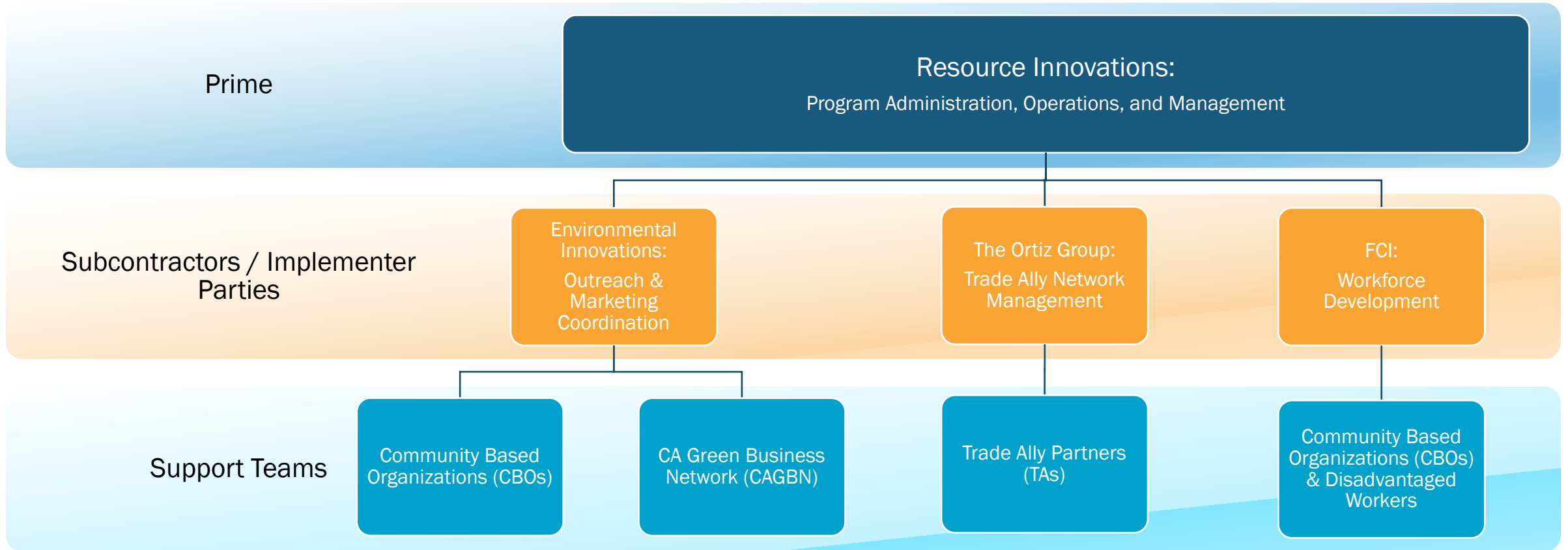
Category:

- Equity- Focus is on bill savings vs energy savings

Expected Initial Delivery:

- December 2023

Program Team & Roles



Program Rationale

Traditional non-residential Demand Side Management program designs:

- Are frequently difficult for SMB customers to access
- Typically offer services and benefits that align with the needs of large customers
- Have performance metrics that make serving small customers prohibitive

Simplified Savings Program helps address such gaps by:

- Focusing exclusively on SMB, non-residential customers within DAC communities or who qualify as HTR customers
- Offering the scale and scope of services required by this customer group to ensure meaningful and continued engagement
- Enabling success by driving customer-facing benefits instead of those of traditional program metrics
- Partnering with TAs and CBOs from DAC/HTR communities with established customer trust and relationships so program benefit extends further into these communities

The Program will increase activity among underserved customer groups and their communities with the goal of facilitating long-term engagement between the SMB DAC/HTR customer, the trade allies and CBOs that support them, and SCE.

Program Features

SMB Focused Services and Measures

Simple to participate

Single point of contact for program engagement

Relevant information and educational support

Relevant no-cost and discounted measures

Custom software configured to support unique small business needs

DAC/HTR MSB Focused Team

Green Business Partners provides a path to improved sustainability

CBOs support local, community-oriented outreach

Local TA Network ready to serve small customers comprehensively and efficiently

Equity Status Enables Prioritization of DAC/HTR SMB Benefits

Bill cost reduction

NEBs

Meaningful customer service

Steppingstones towards long-term engagement



Program Services: Project Type

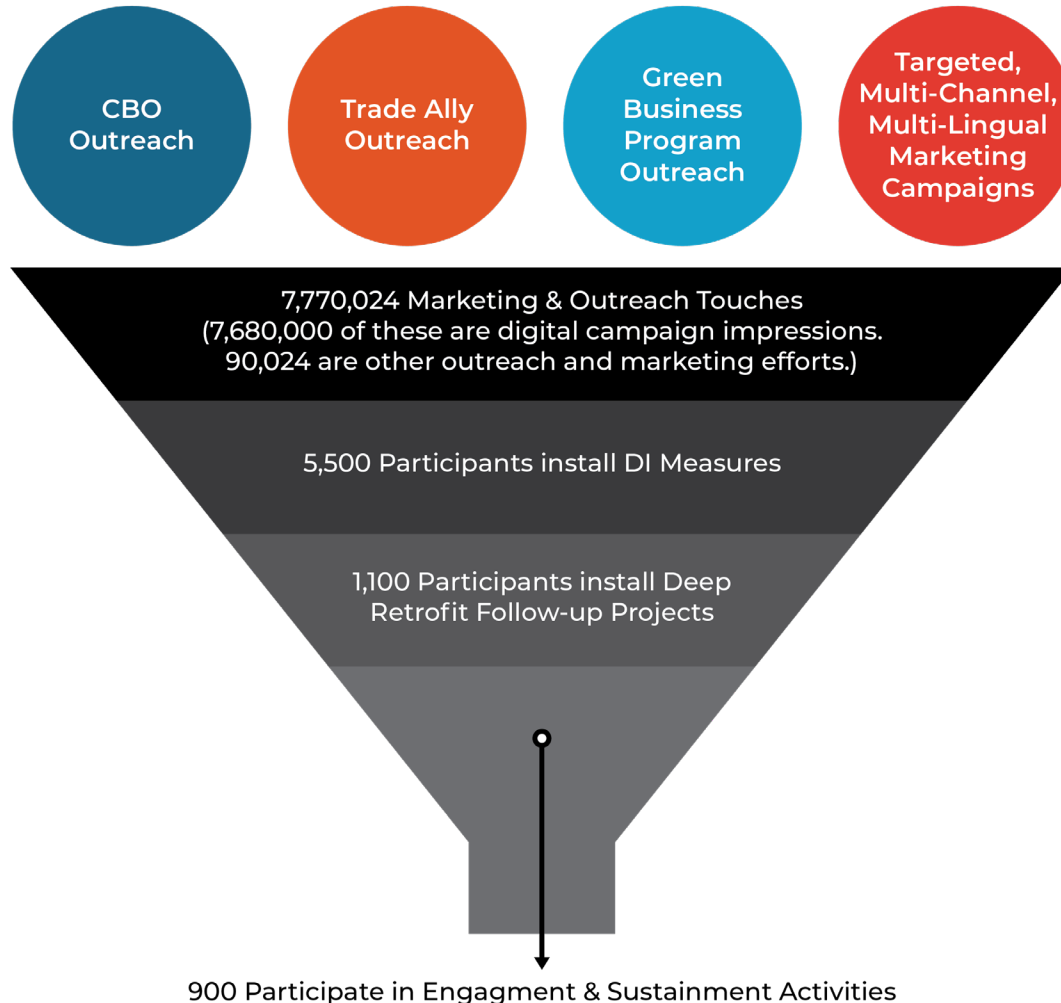
Eligible customers will have access to two categories of projects based on opportunities identified and their willingness to engage:

Participation Type	Benefits
Direct Install (DI)	<ul style="list-style-type: none"> • Provides a more simplified approach to customer participation and improves their access to energy efficiency solutions • Opportunities for DI are found in a high percentage of targeted customer facilities and are simple for TAs to identify and install in a single visit • Little to no customer cost • Real monetary savings on utility bills • Enhanced comfort, health, and safety benefits
Post Direct-Install (Post-DI)	<ul style="list-style-type: none"> • Yield deeper, longer-term energy savings and benefits to the customer, as well as claimable energy savings to SCE • Incentives applied directly to TA invoices to help offset the cost to the customer • TAs will also identify incentives available from third-party/CCA/REN programs to maximize value for the participant

Program Services: Measures

Tech Type	Direct Install	Non-Resource	Resource (Energy Savings)	Post-Direct Install (Instant Discount)	Non-Resource	Resource (Energy Savings)
Envelope				Window Film	X	
HVAC	Smart Thermostats	X		Heat pump replacing a gas furnace		X
	Pipe Insulation		X	Heat pump replacing a heat pump		X
				Variable frequency drive motors		X
IAQ	Room air purifiers	X				
Lighting	LED pin & screw based lamps	X		3-Lamp linear LED lamp hardwired retrofit		X
	LED recessed downlight retrofit kit	X		2-Lamp linear LED lamp hardwired retrofit		X
	LED troffer kits 2X2	X		Indoor low bay: LED		X
	LED troffer kits 2X4	X		Interior LED fixtures - general	X	
	Type A LED tubes		X	LED fixture retrofit kit	X	
	Occupancy sensing wall switches	X		Refrigerated display lighting	X	
Plug Load	Bluetooth smart power strips	X				
	Smart outlets & timers for vending machines		X			
Refrigeration	Auto door closer: Freezer		X	Auto door closer: Cooler		X
				ECM for display cases & alk-ins		X
				Evaporator fan coolers for walk in		X
Water	Faucet aerators		X	Electric to electric water heater		X
	Pre-rinse spray valves		X			

Marketing the Program



- Reach and educate as many customers as possible
- Marketing & outreach designed to reach eligible customers (DACs, etc.)
- Fully leverage our trade allies, CBOs, Green business program outreach, and local program experts
 - Marketing materials/collateral, education, event support, etc.
- **Multi-channel marketing campaigns, hyper-targeted to prioritized customers**
 - Digital, email, direct mail
 - Multilingual

Success Metrics

Top Priority

Benefits

- Annual Bill Savings
- Customer Satisfaction
- 5,500 DAC/HTR Customers are:
 - Well served
 - Better informed
 - More engaged



Secondary Priorities

Co-Benefits

- Additional contingent of Disadvantaged Workers benefitting from Equity Segment programs
- Capturing Energy Savings
- GHG Reduction



Non-Energy Benefits

- Health
- Comfort
- Safety

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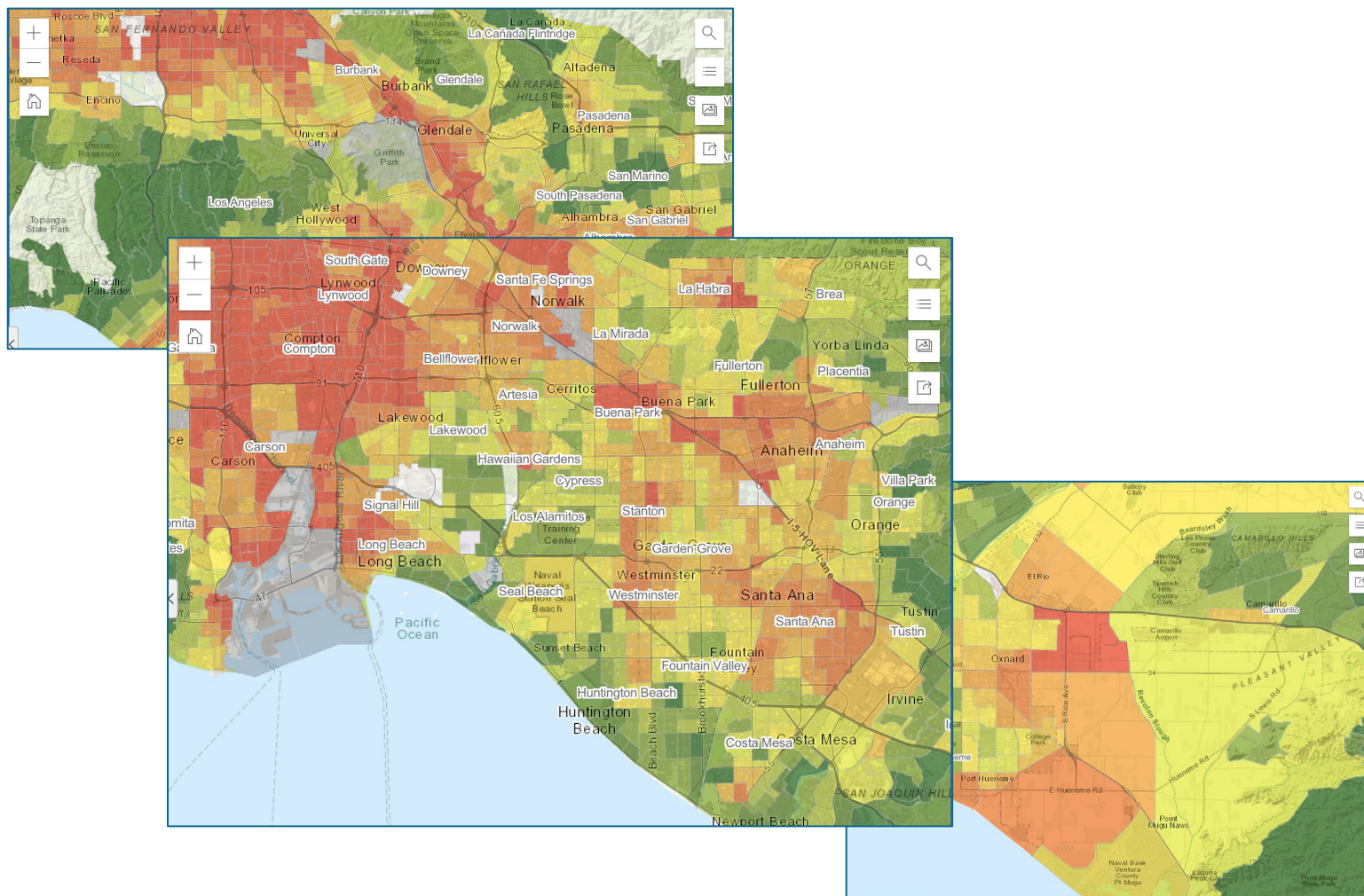
Customer: Eligibility, Targeting & Benefits

Customer Eligibility Requirements

- ✓ SCE customer with a non-residential account
- ✓ Demand 200kW or less
- ✓ Operates within a DAC
 - Based on CalEPA CalEnviroScreen SB535 Disadvantaged Communities data
- or-
- ✓ Considered Small Business HTR
 - Language – English is not the primary language
 - Business Size – less than 10 employees
 - Leased Facility – customer does not own their facility

NAICS Code	Sector Title
11	Agriculture, Forestry, Fishing and Hunting
44-45	Retail Trade
53	Real Estate Rental and Leasing
54	Professional, Scientific and Technical Services
56	Administrative and Support, Waste Management and Remediation Services
61	Educational Services
62	Health Care and Social Assistance
72	Accommodation and Food Services
81	Other Services (except Public Admin)
92	Public Administration

Finding and Addressing the Most Vulnerable Businesses



- There are pockets of vulnerable businesses in non-DAC areas
- 307 tracts of vulnerable communities per SB535
- Green Business Programs are mandated by funders to find and serve underserved businesses. They know how to find them and have done deep dives with businesses in pockets of a few square miles.
- We use mapping as a tool to focus on these areas. Our Programs also have knowledge of the vulnerable areas. Many businesses are considered vulnerable and HTR themselves, either by speaking English as a second language, renting their facility, or being a micro-business.

Customer Targeting and Outreach

Customer Targeting

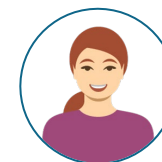
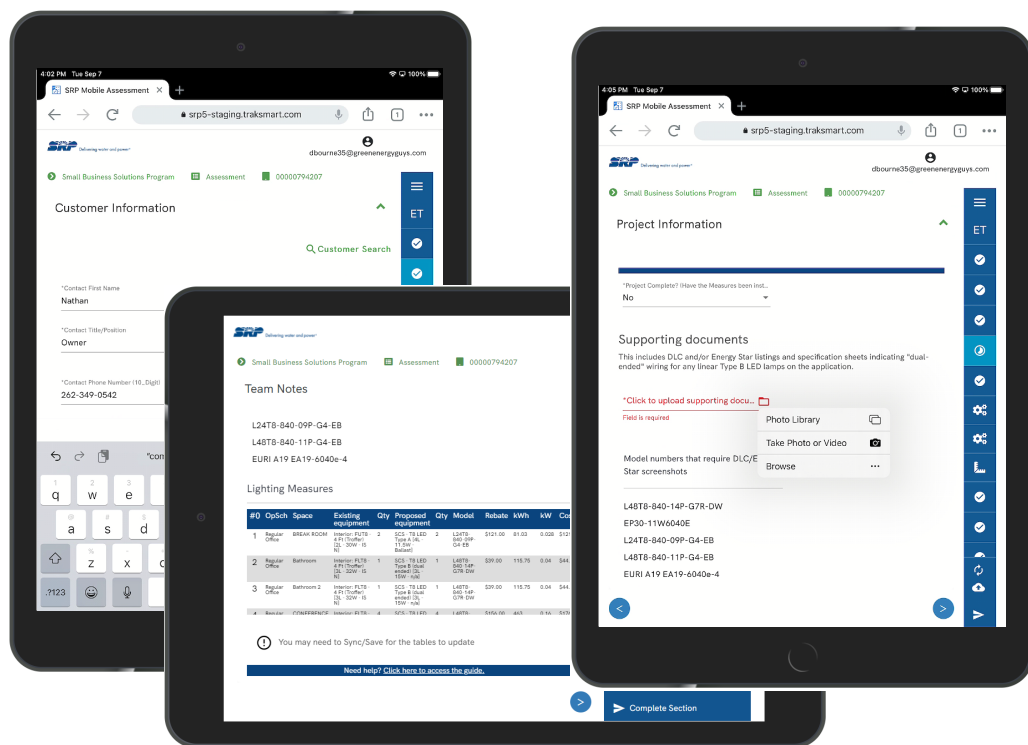
- CalEnviroScreen
- Demographic data from businesses participating in the Green Business Program
- [Minority-Owned Business Vulnerability - Urban Displacement Map](#)

Customer Outreach

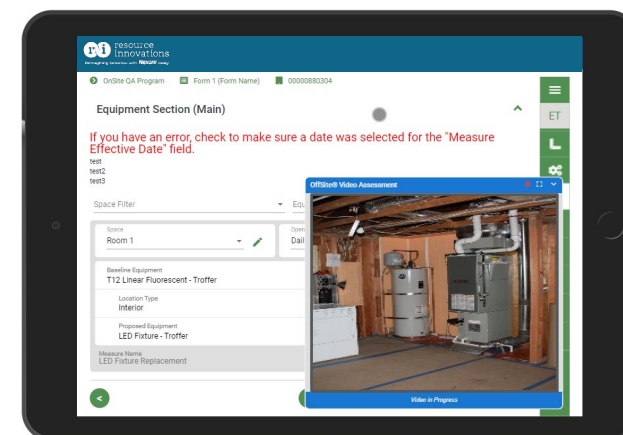
- Green Business Partners
- Community Based Organizations
- Contractors via Trade Ally Network
- Program marketing collateral
- Promotion through traditional and social media communication outlets

Enrolled Customer Engagement - Input

Customer information and site detail captured through program assessment tool by program liaison




- Video audits
- Screenshots with mark-ups
- Recordings



Enrolled Customer Engagement - Output

Project Plan provides summary of site-specific opportunities, information and next steps


Simplified Savings Program Project Plan

Thank you for participating in the Simplified Savings Program. The following report provides a summary of recommendations for you to consider during your journey towards improved energy efficiency for your business.

SAVINGS OVERVIEW

Estimated PG&E Bill Savings*
\$1,537 Over 3 Years

Estimated PG&E Incentive**
\$3,258

* Utility Bill Savings are estimates based on blended PG&E rate for small businesses; \$0.30/kWh and \$1.50/therm. Actual rates and cost savings may vary.
** Incentive amounts are based on the Simplified Savings Program Measure List and will be paid by the program directly to the installing contractor for projects selected by the customer for installation.

Application #: 0000228808

Prepared For:
Customer preferred business name
Customer Address

Prepared By:
Installer Company
Installer Contact Name
[Installer Contact Email](#)

Summary of Program-Installed Upgrade Opportunities			
Upgrade Category	Estimated Annual Bill Savings Potential	Estimated Out-of-Pocket Cost	Estimated Simple Payback (Years)
Building Envelope	\$512	\$0	0.0
Totals	\$512	\$0	0.0

Simplified Savings Program Preferred Business Name 1

1 Program-Installed Project Opportunities

As a participant of the Simplified Savings Program, you qualify to receive incentives towards the following energy bill-reducing equipment upgrades from PG&E.

Please review the following summary and let us know which projects you'd like to move forward with.

Proposed Upgrades	Estimated Savings	Estimated Cost and Payback
Room Air Purifiers <small>Quantity: 3 This measure includes installation of air purifiers. Space must not have an existing air purifier or it must be a less efficient.</small>	390 kWh/year -4 Therms/year \$110 PG&E Bill Savings Potential	Program Installed, No Cost
Window Film <small>Quantity: 400 This retrofit includes placing tint on windows without film or significant tint, or replace film that has been significantly damaged and no longer provides efficiency gains. The window film must be installed on single-pane glass.</small>	1,552 kWh/year -42 Therms/year \$402 PG&E Bill Savings Potential	Cost \$520 \$2,520** Payback 1.3 years 6.3 years**

**before PG&E reduction

Simplified Savings Program Preferred Business Name 2

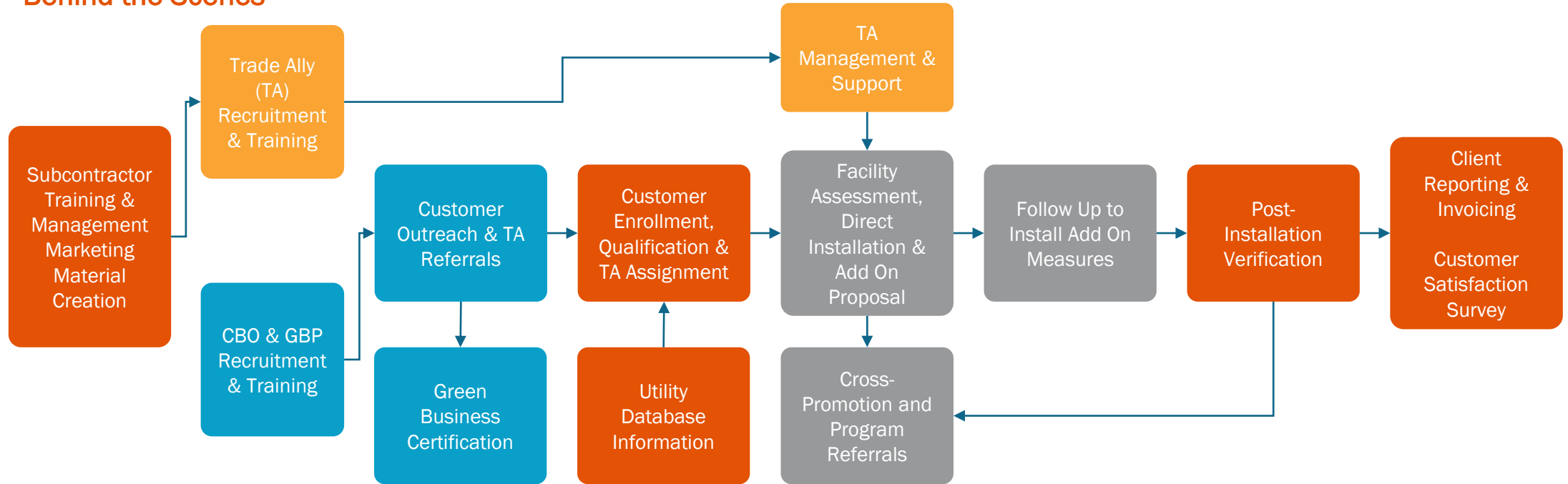


- Summary of opportunity, e.g.
 - Measure Recommendations
 - Estimated Bill Savings
 - Operation & Maintenance Opportunities
- Resource Guide
- Program liaison contact information
- Next steps
- Program Terms & Conditions

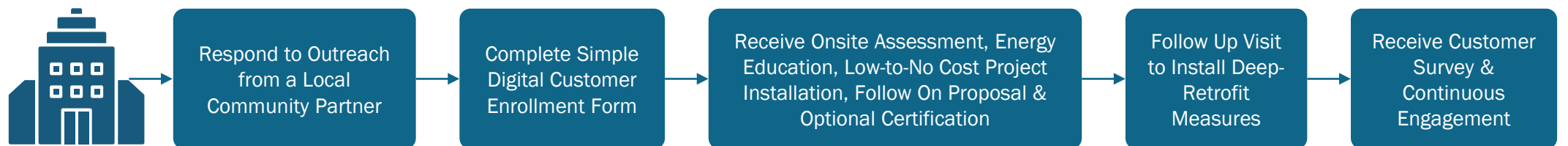
Simplified Savings Process Flow

Process Flow

Behind the Scenes



From the Customer Perspective



Resource Innovations

Environmental Innovations

Community-Based Organizations

Green Business Programs

Ortiz Group

Trade Allies

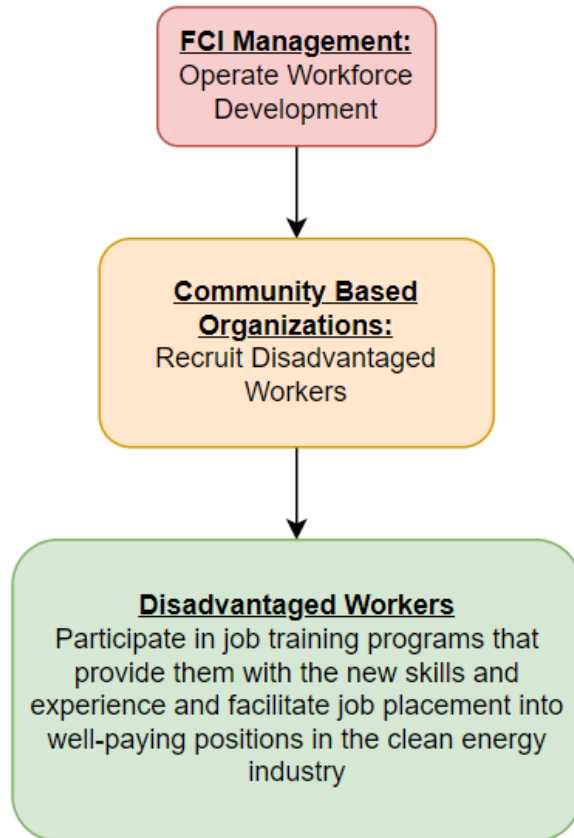
Metric: Customer Benefits

Annual Bill Savings: $(\text{Avg } 1^{\text{st}} \text{ year kWh} \times \$0.30) + (\text{Avg } 1^{\text{st}} \text{ year therm} \times \$1.50)$

Measure Family	Estimated Adoption (# of Units)	Estimated Bill Savings
Lighting	185,240	\$1,762,380
Plug Loads	2,723	\$154,737
Refrigeration	707	\$196,799
HVAC	23,320	\$135,902
Water Heating	29,411	\$730,579

*Estimated Simplified Savings Measure Mix

Co-Benefit: Workforce Development



FCI Management's Optional Enhancements

- Educational path to lighting or HVAC Certification through an accredited program
 - Participants achieve educational requirements and the required number of hours working with a contractor needed to sit for the state certification exam
 - Partnership with CBOs to identify DAW for participation in the training program and provide mentorship
- Support for participants interested in other careers in the clean energy industry (e.g., energy audits, back-office support) in the form of classroom-based education and/or on-the-job training

Co-Benefit: Energy Savings

Energy Savings Goals (Program)	Total
Therms	133,162
kW	478
kWh	4,158,016

Notes:

- Savings delivery timeline is subject to change based on updates to the Initial Delivery Period
- Savings goals are subject to change based on finalized measure list for resource and non-resource measures

Metric: Non-Energy Benefits

Reported Non-Energy Benefits (NEBs):

Collected via customer survey

- Health – Indoor Air Quality, Outdoor Air Quality, Reduction in Interior Contaminants, other
- Comfort – reduced drafts, quieter interior, managed interior temperature, other
- Safety – improved safety of appliances, improved visibility
- Economic or other Non-Energy Benefit



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Timeline

Milestone Schedule

Projected Days After CPUC Approval	*Projected Date	Milestone
90 days	11/13/2023	Finalize Configuration of iEnergy Software
120 days	12/13/2023	Initial TA, GBP, and CBO Roster and Training
150 days	1/12/2024	Commence Marketing Activities
165 days	1/27/2024	Initiate Enrollment of Customers for the first Delivery Period Month
180 days	2/11/2024	Initial Project Delivery

*Estimate based on the August 15, 2023 CPUC approval date



Program Contact Information

Simplified Savings Program PM

Melanie Stutler

mstutler@resource-innovations.com

Coming Soon:

Website Address

Program Email Address

Program Phone Contact



Thank You!

8 • 29 • 2023



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