Implementation Plan

Residential Energy Solutions

DRAFT

Program Implementer: Synergy Companies

Portfolio Administrator: Southern California Edison

May 2025
Version 1.0

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1. Program Overview

The Residential Energy Solutions (RES) Program provides the direct installation of comprehensive energy efficiency measures to Residential Single-family and Manufactured Housing customers at no cost. It targets specific geographic areas to alleviate energy hardship and electric system constraints and to assist the lower—to medium-income population not eligible for income assistance programs. The program enhances energy efficiency knowledge and program participation of the Single-family and Manufactured Housing market segments to motivate them to undertake deeper energy efficiency activities and retrofits.

Table 1: Budget and Savings			
1	Program Name		Residential Energy Solutions
2	Program ID Number		SCE_3P_2025R_002
3	Program Implementer		Synergy Companies
4	Portfolio Administrator		SCE
5	Program Implementer Type		Third Party-Solicited
6	Portfolio Segment[1]		Resource Acquisition
7	Total Program Budget		$33,000,000
8	Program Budget by Year	2025	$3,000,000
		2026	$10,000,000
		2027	$10,000,000
		2028	$10,000,000
9	Program Duration		6/1/2025 - 12/31/2028
10	TSB by Total and Program Year	Total	$46,402,898
		2025	$3,959,539
		2026	$13,626,206
		2027	$14,197,536
		2028	$14,619,617
11	CO_2	Lifecycle	
		First Year	
		Net	
		Gross	
12	kW (demand reduction)	First Year	
		Net	
		Gross	

[1] D.21-05-031 Ordering Paragraph 2.

Table 1: Budget and Savings			
12	KWh (energy savings)	Lifecycle	
		First Year	
		Net	
		Gross	
13	Therms (Lifecycle, First Year, Net, Gross)		NA
14	Program Cost Effectiveness: Total Resource Cost (TRC) Ratio	Total	1.28
		2025	1.21
		2026	1.25
		2027	1.30
		2028	1.34
15	Program Cost Effectiveness: Program Administrator Cost (PAC) Ratio	Total	1.41
		2025	1.34
		2026	1.38
		2027	1.44
		2028	1.48
16	Market Sector(s)		Residential
17	Program Type		Resource
18	Delivery Type(s)[2]		Downstream
19	Intervention Strategies		Direct Install
20	M&V Methods		Deemed

2. Implementation Plan Narrative

1. Program Description

The Residential Energy Solutions (RES) Program provides the direct installation of comprehensive energy efficiency measures to Residential Single-family and Manufactured Housing customers at no cost. It targets specific geographic areas to alleviate energy hardship and electric system constraints and to assist the lower—to medium-income population not eligible for income assistance programs. The program is designed to enhance energy efficiency knowledge and program participation of the Single-family and Manufactured Housing market segments to motivate them to undertake deeper energy efficiency activities and retrofits.

[2] Database for Energy Efficiency Resources (DEER) 2026 Delivery Types.

Cost-effectiveness is achieved by installing a mix of energy efficiency technologies that yield a high Total System Benefit (TSB) and Total Resource Cost (TRC) that is supported by CPUC-approved Measure Packages located on California's Electronic Technical Reference Manual (eTRM). Clean energy is achieved primarily by reducing greenhouse gas emissions from the energy efficiency technologies installed. In addition to energy efficiency, the program promotes Integrated Demand Side Management (IDSM) by installing demand response-ready smart thermostats with the option for customers to be enrolled in SCE's Smart Energy Program by a RES program installer.

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

This program plans to concentrate on deemed fuel substitution measures (not custom) targeting single-family and manufactured housing customers by Climate Zone (HVAC type) with a whole building approach for cost-effectiveness. Secondary or sub-objectives are to assess all other measure offerings that might also meet the customer's needs at the site. Listed below are the guiding principles to achieve the program objectives:

(a) Maintain a cost-effective program.

(b) Promote SCE's Demand Response Smart Energy Program.

(c) Coordinate with and integrate other Investor-Owned Utility (IOU) and water agency programs.

(d) Collect, store, and submit installation data that aspires to 100% accuracy, along with supporting documentation that provides proof of installation, including secure and tamper-proof geotagged time-stamped photos and proof of permit closure, where applicable.

(e) In accordance with Decision 21-06-015, target customers with the following characteristics: Disadvantaged Communities (DAC), Hard-to-Reach (HTR), Rural, and Climate Zones (9, 10, 13, 14, and 15).

2. Performance Tracking

The RES Program expects to treat a combined 10,000 single-family and manufactured homes annually. Also, the program targets include TSB, energy savings, demand reductions, and TRC ratios by program year as listed in Table 1 above. A list of the primary Key Program Indicators (KPIs) is shown in Table 2 below.

Table 2 – Key Program Indicators

KPI	Description	Measurement	Purpose of KPI
Energy Savings (kWh, kW, therms)	A comparison of net lifecycle energy savings achieved vs. net lifecycle energy savings targets	Based on numeric value of the total net lifecycle energy savings achieved	Track progress towards achieving annual program savings goals

Table 2 – Key Program Indicators			
KPI	**Description**	**Measurement**	**Purpose of KPI**
Project Pipeline Target (kWh, kW, therms)	A comparison of net life cycle energy savings associated with future project pipeline in relation to the net life cycle energy savings targets	Numeric value of the total net lifecycle energy savings tracked in the program pipeline	Track progress towards achieving overall program savings goals
TSB	TSB Achieved	Dollars	
Schedule Adherence	Expected TSB vs. Ex Ante TSB; Expected TRC Ratio vs. Ex Ante Annual TRC Ratio	Expected performance vs. actual performance	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 respond to customer needs, number of complaints, resolution of complaints, flexibility, reporting accuracy and timeliness	Report of overall customer satisfaction rating	Reflects ability to deliver Program at a high level of customer satisfaction

The Program also consists of an expected volume of measures installed by year as follows:

Table 3 - Expected Measures Installed by Program Year					
Measure	**2025**	**2026**	**2027**	**2028**	**Total**
Duct seal and test, residential	600	1,733	1,733	1,733	5,799
Central brushless fan motor	325	780	780	780	2,665
Residential smart thermostat	1,006	3,200	3,200	3,200	10,606
Smart fan controller	1,500	4,800	4,800	4,800	15,900
Lifecycle refrigerant mgmt. + refrigerant charge	600	2,076	2,076	2,076	6,828
Lifecycle refrigerant management	500	1,900	1,900	1,900	6,200

In addition to energy efficiency, the program implements EE/DR integration by installing demand response-ready smart thermostats and enrolling customers in SCE's Smart Energy Program (SEP). The

SEP enrollment takes place during the energy efficiency installation visit. The program forecasts to enroll 3,000 single-family customers annually into SCE's Smart Energy Program.

3. Program Delivery and Customer Services

Eligible Customer: SCE residential homeowners residing in a single-family or manufactured housing building type are eligible to participate in the program. A single-family building type is a detached residential building with one dwelling unit and a valid SCE residential meter type. A manufactured home building type is a prefabricated detached residential building with one dwelling unit and a valid SCE residential meter type. Manufactured homes are located within manufactured housing communities, neighborhoods, and privately owned or leased land. There are no income requirements to participate in the program.

Program Strategies/Tactics: Synergy uses Google Maps for Business to create single-family direct outreach territories with virtual borders. These territories contain 5 to 8 single-family neighborhoods with climate zones and DAC overlays. Outreach teams of energy specialists are assigned territories based on climate zone, DAC, and energy savings goals. Program outreach associates use iPads to display maps and indicate which program measures are eligible by single-family home, increasing the enrollment productivity of the outreach. The program flyers and door hangers provide program credibility to the customer while in the field.

Synergy has a database of all manufactured housing parks in SCE's service territory, organized by California Climate Zone and DAC eligibility. Energy specialists are assigned territories based on climate zone, DAC, and energy savings goals. Program energy specialists use iPads with manufactured housing park maps that indicate which program measures are eligible by space number, increasing the enrollment productivity of the outreach. The program flyers and door hangers provide program credibility to the customer while in the field.

The program's energy specialists and manufactured home liaisons get approval from homeowners association (HOA) presidents and manufactured housing park management to do outreach in single-family neighborhoods and the manufactured home park (MHP) so that program participation can begin. They also set up single-family and clubhouse presentations, which draw large crowds to learn about and enroll in the program. They also strategically place the program in the HOA and mobile home park's available social media channels.

Double-Dipping Prevention Plan: Before conducting installation or other program services for a customer, Synergy performs a Duplicate Measure Request Inquiry (DMRI) of its program database to determine what measures and services the customer is eligible for. Additionally, when invoicing, the same DMRI is conducted as an additional control to prevent payment requests for a measure installed previously by Synergy.

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

When the project is completed, the customer receives a walkthrough of what was installed and signs off on the work being installed to their satisfaction. The customer is then invoiced for the work performed

and pays according to the terms outlined in the agreement. See Figure 1 below for an illustration of the coordination process.

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

The next phase of the strategy involves surveying program participants to determine their HTR status. During the installation, participants are surveyed to define their primary language, income, housing type, and home ownership criteria.

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

Targeted Customer Groups: Single-family and manufactured residential building types. The program also targets Energy Savings Assistance (ESA) ineligible populations, high energy users, Disadvantaged Communities (DAC), and Hard-to-Reach customers. ESA-eligible customers are referred to SCE's ESA program for follow-up and coordination of ESA program services.

4. Program Design and Best Practices

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The program design addresses the most common market barriers in the single-family and manufactured housing sectors with specific program strategies. See Table 4 below.

Table 4 - Single-family and Manufactured Housing Market Barriers and Strategies	
Market Barriers	**Program Strategies to Overcome Barriers**
Deep, holistic, and quality whole-home retrofits and building electrification have high costs relative to expected energy savings.	Cost-effective direct installation measures awaken interest in low-cost advanced clean energy technology improvements, which then awakens interest in full-cost advanced clean technology. For advanced clean technology, financing with specific terms to offset the finance fees by the energy savings is provided. If available, the financing is provided through residential energy efficiency loans such as REEL or on-bill financing (OBF).
Need for engagement tools to drive continuous customer behavior, persistence, and program participation.	During the direct install visit, customers receive a complimentary walkthrough energy assessment and sales consultation that identifies advanced energy efficiency and building electrification opportunities. Interested customers receive additional information on these opportunities and a sales quote from the implementer to purchase and install these technologies.

5. Innovation

Table 5 – Program Innovations		
Innovative Features	**Description**	**How These Increase Participation and/or EE Adoption**
Advancing a Technology – Synergy Tech System® v.2.0 with Kaizen & Six-Sigma Process Engineering	Synergy Tech System® v.2.0 contains all the features of Synergy Tech System® v.1.0 and Fluix forms baked into one platform. All the measure package field data collection requirements, geotagged timestamped photos, and measure quantities are recorded in one place. The data is extracted from the platform and, with automation, translated to match SCE's iEnergy program bulk upload template. Kaizen and Six Sigma are applied to engineering the data reporting process. Synergy Tech System® is the tool, and the engineered process maximizes the tool and drives the program toward zero defects in delivery. The Synergy technician, data entry staff, and invoicing and reporting staff have written instructions to implement the process. Feedback is given from the process players, and the process is improved over time.	Technological advancement results in higher program performance by increasing the technician's efficiency, reducing the number of invoicing errors, and improving the program management experience for SCE and Synergy. With fewer digital platforms and forms to fill out, the technician can dedicate more time to installing program measures and fulfilling appointments. With reduced errors, invoices are approved more quickly, and energy savings are claimed without delay.
Marketing Strategy – Professional Grade Videos Demonstrating Energy Efficiency	Synergy's marketing department produces professional-grade videos demonstrating the energy efficiency measure installation process and benefits.	The videos increase the uptake of cost-effective program measures that may not have been understood.
Delivery Approach – Clean Energy Pathway, Water Agency Leveraging, Virtual Power Plant, ESA Enrollment Driver	The delivery approach begins with clean energy in mind, unlike the past's direct installation-only energy efficiency programs. Along the way, it is expandable to include water energy nexus opportunities with the implementer's water agency agreements that overlap SCE's service territory. RES is a unique platform for constructing a demand response virtual power plant. Its foundation lies in the quality installation of smart thermostats and	The RES program offers a comprehensive and diverse range of opportunities, catering to a broad audience and advancing energy efficiency. This inclusivity opens up program opportunities that would not have been available in a direct-install

Table 5 – Program Innovations		
Innovative Features	**Description**	**How These Increase Participation and/or EE Adoption**
	Smart Energy Program demand response program enrollments, setting it apart from similar initiatives. The delivery approach also includes ESA enrollment by a Synergy-certified ESA associate.	energy efficiency-only program.

6. Pilots

Not applicable; the program does not have pilots planned.

7. Workforce Education & Training (WE&T) [3]

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

8. Workforce Standards [4]

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

Table 9 – Workforce Standards	
Relevant Workforce Standards, Skills, Certifications to Ensure Quality Installations and Measure Persistence:	Fulfilling the entire scope of the program requires the workforce to carry a general building contractor's license (B), insulation (C2), electrical (C10), HVAC (C20), plumbing (C36), and potentially solar (C46) if solar technologies are added to the program in the future. It is recommended that a North American Technician Excellence (NATE) certified supervisor be on staff. The Implementer holds these licenses, certifications, and more under CSLB license # 835016 and has North American Technician Excellence (NATE) certified supervisors.
Quality Workforce Assurance:	Quality measure installation training and quality installation field managers ensure measures are installed to the customer's satisfaction and provide safe, clean, reliable energy savings.

[3] D.18-05-041, Page 20-21 and Ordering Paragraph 7.
[4] D.18-10-008, Ordering Paragraph 1-2 and Attachment B, Section A-B, Page B-1.

	To ensure high production quality and customer satisfaction, the Implementer employs full-time Quality Production Managers (QPMs) who physically inspect the work completed on the program. The QPMs also actively resolve customer questions and concerns regarding the work performed and warranty. While physically inspecting the job, the QPMs ensure that measures are correctly installed and perform as they should. These managers focus on maintaining an overall pass rate of 99% on all measures and services inspected. From their inspections, QPMs provide one-on-one technician training to maintain a consistent, high-quality result. The Implementer uses the Synergy Tech System® to securely capture measure installation data in the field and electronically transfer it for invoicing and energy savings reporting. Every two weeks, Synergy Managers hold on-site training with Synergy outreach and technicians at the Synergy company facilities. They review industry changes/trends emailed and communicated throughout the week and provide program-specific training. Synergy employs a full-time safety and compliance director who reviews and directs compliance with applicable laws and regulations.
Compliance with Prescriptive Workforce Standards:	Synergy is committed to continuing its compliance with the prescriptive workforce standards outlined in Ordering Paragraphs 1 and 2 of Decisions 18-10-008 and 18-05-041 and to adopting any modifications and adjustments to these standards.

9. Disadvantaged Worker Plan:[5]

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

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

10. Market Access Programs:

Not applicable.

[5] D.18-10-008, Attachment B, Section D, page B-9.

11. Additional Information

Not applicable.

3. Supporting Documents

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

1. Program Manuals and Program Rules

All programs must have manuals[6] uploaded in CEDARS to clarify the eligibility requirements and rules of the program for Implementers and customers. Program rules must comply with CPUC policies and rules. Table templates are available at CEDARS. At minimum, these manuals should include:

#	Information Required	Short Description
1	**Eligible Measures or measure eligibility, if applicable**	Provide requirements for measure eligibility or a list of eligible measures
2	**Customer Eligibility Requirements**	Provide requirements for program participation (for example, annual energy use or peak kW demand)
3	**Contractor Eligibility Requirements**	List of any contractor (and/or developer, manufacturer, retailer or other "participant") or sub-contractor eligibility requirements. (For example: specific required trainings, specific contractor accreditations, and/or specific technician certifications required.)
4	**Participating Contractors, Manufacturers, Retailers, Distributors, and Partners**	• For upstream or midstream incentives and/or buy-down programs indicate these, if applicable.
5	**Additional Services**	Briefly describe any additional sub-program delivery and measure installation and/or marketing & outreach, training, and/or other services provided, if not yet described above.
6	**Audits**	Indicate whether: • Pre- and post-audits are required • Funding or incentive levels have been set for audits • Eligibility requirements for audit incentives • Which demand-side resources will be included within the audit's scope, and • Who will perform the audit.
7	**Sub-Program Quality Assurance Provisions**	Please list quality assurance and quality control requirements, including accreditations and/or certification or other credentials.
8	**Other Program Metrics**	List all documentation and data used to calculate Program Metrics. This includes but is not limited to data supporting sector-level and portfolio-level metrics.

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

2. Program Theory [7] and Program Logic Model [8]

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

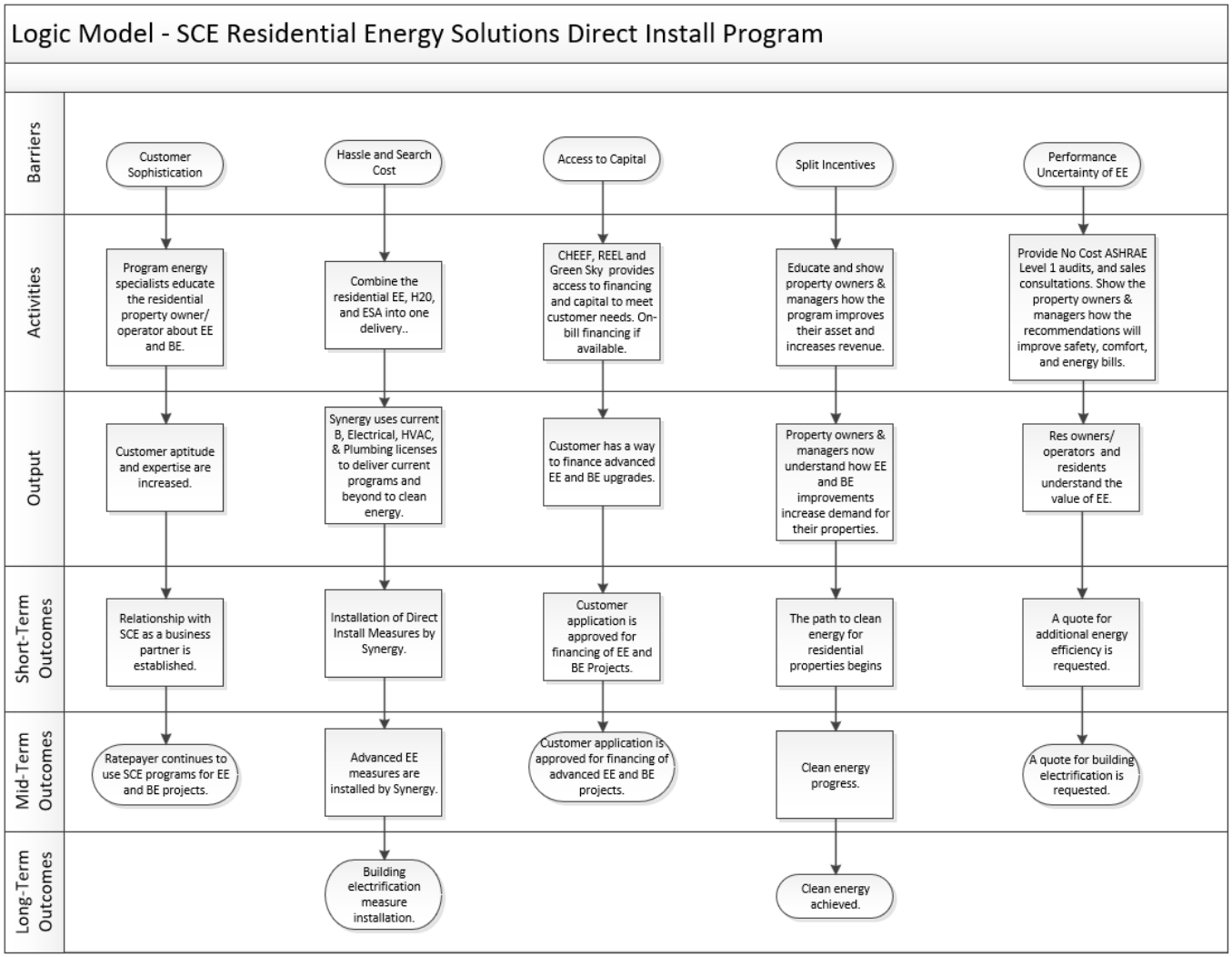
- Disadvantaged Communities (DAC)
- Hard-to-Reach (HTR)
- Rural
- Climate Zones (6, 8, 9, 10, 13, 14, and 15)

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

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

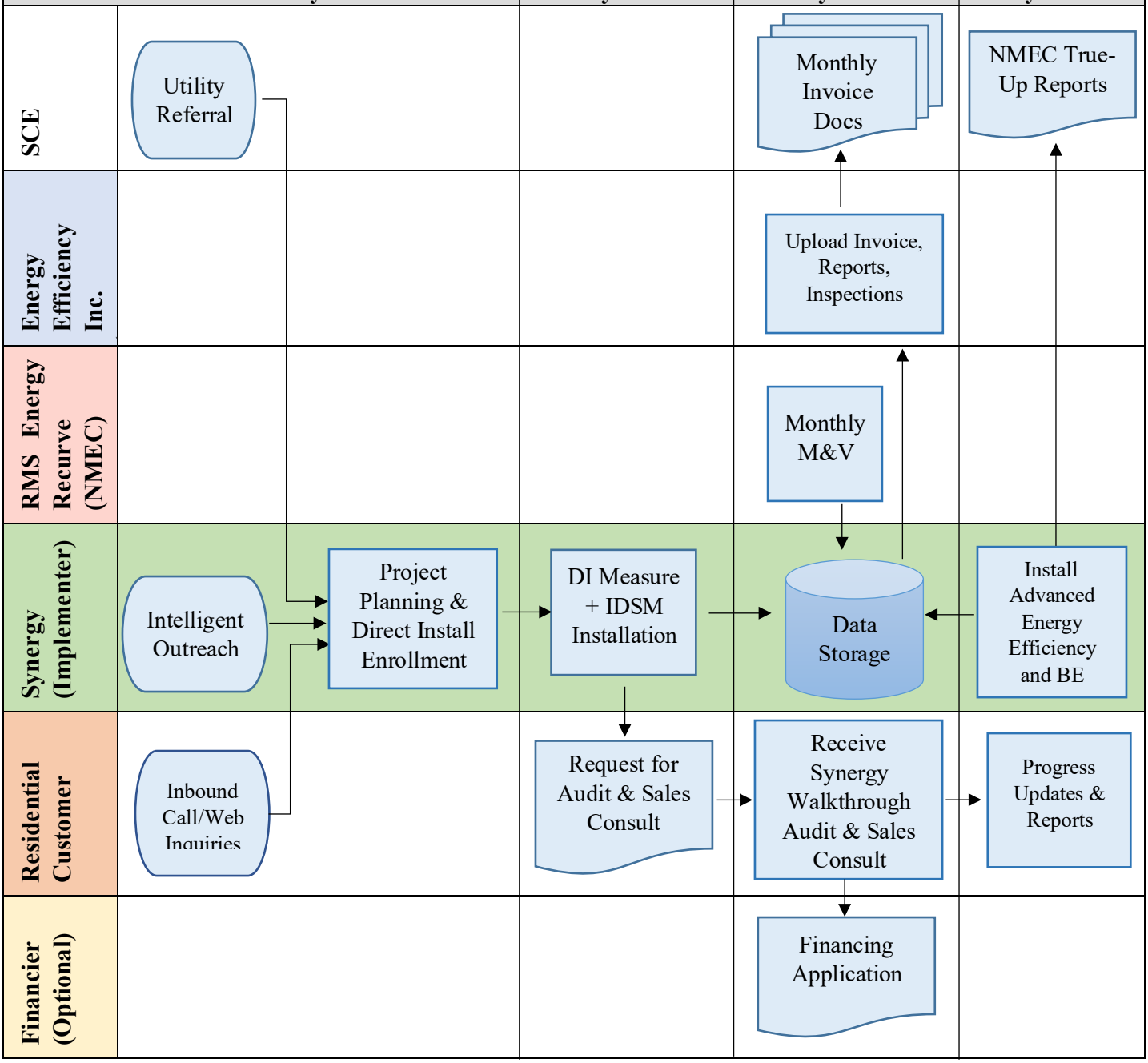
[8] The graphical representation of the program theory showing the flow between activities, their outputs, and subsequent short-term, intermediate, and long-term outcomes. *California Evaluation Framework*, June 2004.

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



3. Process Flow Chart

Figure Q2(a) - SCE Residential Energy Solutions Project End-to-End Process



4. Measure and Incentives[9]

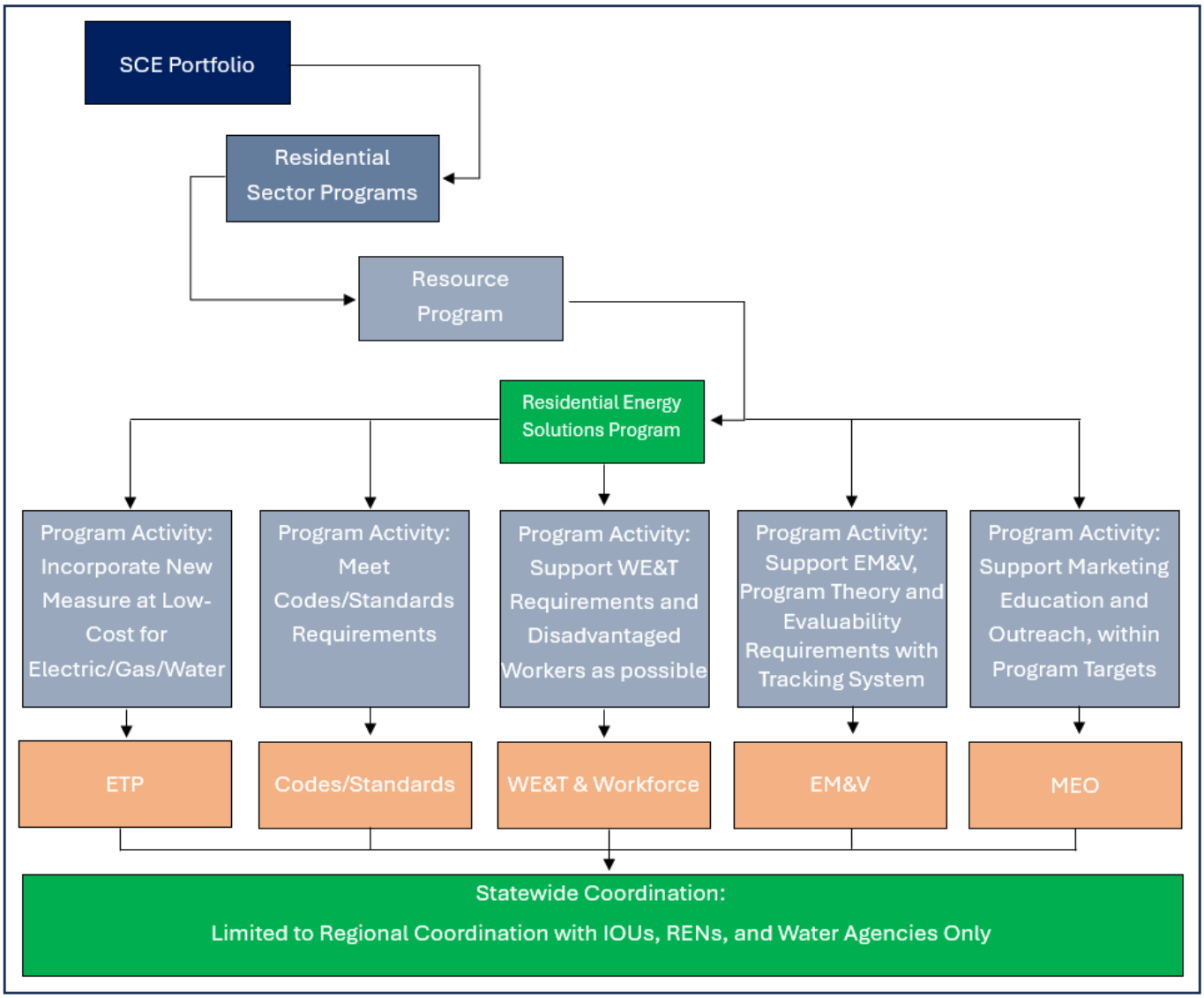
#	Measure	Incentive Level
1	Duct Seal, Residential	Direct Install
2	Brushless Fan Motor Replacement, Residential	Direct Install
3	Smart Thermostat, Residential	Direct Install
4	Smart Fan Controller, Residential	Direct Install
5	Lifecycle Refrigerant Management, Residential	Direct Install
6	Heat Pump Water Heater, Residential, Fuel Substitution	Direct Install
7	Faucet Aerator, Residential	Direct Install
8	Low-Flow Showerhead, Residential	Direct Install
9	Ceiling Insulation, Residential	Direct Install
10	Duct Optimization, Residential	Direct Install

#	Measure Package ID	Short Description	URL link or location name
1	SWSV001	Duct Seal, Residential	www.caetrm.com
2	SWHC038	Brushless Fan Motor Replacement, Residential	www.caetrm.com
3	SWHC039	Smart Thermostat, Residential	www.caetrm.com
4	SWHC059	Smart Fan Controller, Residential	www.caetrm.com
5	SWSV014	Lifecycle Refrigerant Management, Residential	www.caetrm.com
6	SWWH025	Heat Pump Water Heater, Residential, Fuel Substitution	www.caetrm.com
7	SWWH001	Faucet Aerator, Residential	www.caetrm.com
8	SWWH002	Low-Flow Showerhead, Residential	www.caetrm.com
9	SWBE006	Ceiling Insulation, Residential	www.caetrm.com
10	SWSV013	Duct Optimization, Residential	www.caetrm.com

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

5. Diagram of Program

Residential Energy Solutions Program Diagram



6. Program Measurement, and Verification (M&V):

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

For load impact evaluations, SCE will rely on CPUC's Energy Division to plan and fund this activity.

7. Normalized Metered Energy Consumption (NMEC):

Not applicable.