



# Implementation Plan for the Micro and Small Business Equity Program

Prepared for Pacific Gas and Electric Company

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# 1 Implementation Plan

## 1.1 Program Overview

Simplified Savings Program is an Equity Program that which provide meaningful marketing, outreach and education, direct install services, financing and incentives for deeper bill savings as well as health, comfort and safety benefits to PG&E’s Micro and Small Businesses (MSB) within Disadvantaged Communities and Hard-to-Reach customers.

## 1.2 Program Budget and Savings

1. Program and/or Sub-Program Name

Simplified Savings

2. Program / Sub-Program ID number

PGE\_Com\_SmallBiz

3. Program / Sub-program Budget Table

EE Program Budget	TOTAL PROGRAM BUDGET	BUDGET COST CATEGORIES
3P Program Administrative Costs	\$242,582	2%
Marketing & Outreach Costs	\$741,892	7%
Direct Implementation: Incentives & Rebate Costs	\$473,891	5%
Direct Implementation: Non-Incentive (DINI) Costs	\$8,534,464	85%
<b>TOTALS</b>	<b>\$9,992,829</b>	

4. Program / Sub-program Net Impacts

N/A

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

N/A

6. Program / Sub-Program Cost Effectiveness (PAC)

N/A

**7. Type of Program / Sub-Program Implementer (PA-delivered, third party-delivered or Partnership)**

Third Party-Delivered

**8. Market Sector(s) (i.e., residential, commercial, industrial, agricultural, public)**

Commercial

**9. Program / Sub-program Type (i.e., Non-resource, Resource)**

Equity Program

**10. Market channel(s) (i.e., downstream, midstream, and/or upstream) and Intervention Strategies (e.g., direct install, incentive, finance, audit, technical assistance, etc.), campaign goals, and timeline.**

Market Channel: Downstream and Midstream

Intervention Strategies: Direct Install, Incentives, Audit, Energy Efficiency Education, Non-energy benefits and micro/small DAC/HTR business targeting

Campaign Goals:

- Provide services to over 7,500 businesses, over three years
  - 3,200 Market Support Participants (i.e. customers who receive Energy Education)
  - 4,200 Resource Acquisition Participants (i.e. customers who receive direct install services)
- Achieve more than \$50 average bill savings for 87% of participants, with a goal of delivering \$1,841,442 in estimated bill savings to customers in DACs & to HTR customers
- Recruit, train and manage a minimum of seven Trade Allies, thirteen Green Business Partners (GBPs) and five Community Based Organizations (CBOs).
- Engage disadvantaged workers to support delivery of the program.
- Deliver Health, Comfort and Safety benefits to a majority of businesses.

## 1.3 Implementation Plan Narrative

### 1.3.1 Program Description

#### 1.3.1.1 Brief Summary

The Micro and Small Business Equity Program, branded as the Simplified Savings Program will support PG&E's smallest business customers engage in energy cost reduction activities meant to provide a meaningful stepping-stone on their energy efficiency journey. The program will target non-residential customers <50 kW and operating within Disadvantaged Communities (DAC) and/or considered Hard to Reach (HTR).

#### 1.3.1.2 Program Rationale

Traditional non-residential DSM program designs are frequently difficult for micro and small business customers to access, typically with services and benefits that don't 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.

Simplified Savings Program helps address such gaps by focusing exclusively on non-residential customers below 50 kW operating within DAC and/or HTR communities and, offers the scale and scope of services required by this customer group to ensure meaningful and continued engagement. The program design enables success by driving customer-facing benefits instead of those targeted by traditional DSM programs which prioritize energy savings over all else (e.g. TRC, NTG), hence dramatically improving provision of services to the intended customer categories. Customer Bill Savings is a key metric, as well as other Non-Energy Benefits (NEBs) 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 Trade Ally Network and Community Based Organizations (CBOs) from within DAC and HTR communities to leverage relationships and trust established between these groups as well as to extend program benefit further into these communities

Ultimately, this program will increase activity among underserved customer classes and their communities with the goal of facilitating long term engagement between the DAC/HTR customer, the trade allies and CBOs that support them and PG&E.

#### 1.3.1.3 Program Objectives

The Simplified Savings Program objectives include:

- Engage and increase service to PG&E's micro and small business customers who are considered DAC and/or HTR
- Deliver quantifiable customer bill savings benefit and NEBs to participating customers
- Enable Trade Ally Network members to support the target customer groups

- Coordinate with relevant support services and organizations to facilitate customers' initial and long term engagement (e.g. Community Based Organizations, CA Green Business Network)
- Recruit from and train members of the disadvantaged workforce to enable use of the program for business development and growth opportunities

### 1.3.2 Program Delivery and Customer Services

The Simplified Savings Program will dramatically increase the outreach, engagement and uptake of energy savings activities among PG&E's micro and small business customers operating within DAC and/or HTR communities.

The Resource Innovations team – comprised of Resource Innovations, Ortiz Group, and Environmental Innovations, along with the CA Green Business Network, has the specialized experience, expertise and relationships that will allow the program to target, engage and enable action among the customer communities frequently left underserved or unserved by traditional EE program designs.

A multi-prong outreach approach guided by data and informed by existing team relationships within the market will ensure only eligible customers are engaged, and will receive concierge-level support that matches their specific needs during program participation. Consideration is given to the varying methods in which information can be absorbed by the target customer group, so outreach and marketing strategies will span traditional indirect mail, e-delivery, broadcast via standard media outlets and social media, as well as direct outreach conducted by program team members. In addition to program staff, outreach will be conducted by community based organizations, CA Green Business Network, as well as engagement through the program's Trade Ally Network. Program materials will be translated into multiple languages and culturally-specific channels will be leveraged, and program staff are multi-lingual to ensure maximum distribution of program promotion.

Once a customer is enrolled in the program, their need will be assessed in order to determine what services are best suited for the individual customer site. The table below summarizes the two participation types offered through Simplified Savings Program. Market Support Participation is primarily education and informational support meant to help the customer navigate and understand the variety of energy cost reduction options and resources available to them. This may include a facility assessment, assistance with setting up PG&E My Account, simple energy savings tips, or other information relevant to the customers' active participation in their energy efficiency journey (e.g. financing options, programs available through non-utility channels, etc.) If opportunities are identified where a customer site may benefit from the installation of energy saving measures, Resource Acquisition Participation would occur where a qualified installer will be deployed to provide Direct Install measures (no-cost), and potentially Add-on measures (with a copay after incentive is applied). [The potential for customers participating as market support to make the step toward is high and part of the strategy of this approach](#) In both cases of Resource Acquisition steps by the customer, the installer would

utilize the program’s software platform to collect information, prepare forms and file project documentation on behalf of the customer. This software tool is also capable of generating an assessment report and other leave behind content related to the continuation of the customer’s EE journey and program point of contact information for follow up inquiries.

It is estimated that a portion of program participants may choose to continue their journey beyond energy efficiency and may opt to enroll in the CA Green Business Certification program, which Simplified Savings Program will coordinate with in outreach and marketing activities through the duration of the program.

The program will recruit from within DAC and HTR communities to expand its existing Trade Ally Network to help ensure program benefit is extended to contractor-members of these communities. Once enrolled into the Trade Ally Network, a contractor will be trained by program staff to understand program rules and process, utilize program software tools and promote the value of program services to eligible customers.

The program team will use outputs from the software tool to generate reports, conduct inspections and collect customer survey information. Based on outputs, the program team will coordinate with PG&E to validate outcomes and modify strategies leveraging a continuous improvement feedback tactic in order to ensure the program design remains strong and relevant over time.

Participation Type	Program Benefits	Energy Savings Actions
Market Support Participant (MSP)	<ul style="list-style-type: none"> <li>▪ Energy education, assessment</li> <li>▪ Energy savings tips (at a minimum)</li> <li>▪ Basic measure installs</li> </ul>	<p>An MSP receives at least one of the following during phone call or in-person visit from our outreach team:</p> <ul style="list-style-type: none"> <li>▪ Energy savings education/tips</li> <li>▪ Facility assessment</li> <li>▪ MyAccount and Energy Check-up tool set-up and education</li> <li>▪ Information and/or application assistance for other relevant DSM programs</li> </ul>
Resource Acquisition Participant (RAP)	<ul style="list-style-type: none"> <li>▪ MSP benefits (see above)</li> <li>▪ Installed program measures (DI and add-on measure projects)</li> <li>▪ Sustained engagement</li> </ul>	<ul style="list-style-type: none"> <li>▪ No-cost direct installation of energy-saving measures resulting in bill savings</li> <li>▪ Incentives for additional EE measures (add-on measures)</li> </ul>

Participation Type	Program Benefits	Energy Savings Actions
		<ul style="list-style-type: none"> <li>Referrals / Assistance to participate in relevant programs (e.g., Green Business Program Certification)</li> </ul>

Program Timeline based on an approval of the Advice Letter by 12/31/2022.

- Initial Partner Recruitment (TAs, GBPs and CBOs): Completed by February 1st, 2023
- Program Launch Date: March 1st, 2023
- Program recruitment will be phased based on the Phased Roll Out Plan below.
- Program End Date: December 31st, 2025

**Draft Phased Roll Out (Subject to Change):**

Phase Start Month	Region(s)	Counties
<b>Phase 1: March 2023</b>	Bay Area Central Valley Central Coast	San Mateo Santa Clara Alameda San Joaquin Kern Fresno Tulare Monterey* City of Santa Cruz* San Benito* City of Monterey* Santa Cruz*
<b>Phase 2: January 2024</b>	Bay Area Central Valley Central Coast Sierra	Kings City of Watsonville San Francisco Contra Costa Solano



		Stanislaus Merced Sonoma Nevada* Placer* City of Hayward*
<b>Phase 3: July 2024</b>	Bay Area Central Valley Northern Valley	Butte Yolo Yuba Marin* Napa* San Luis Obispo* Santa Barbara*

are listed as geographical references only. Not all counties have census tract DAC areas designated within them. In these circumstances in these areas

### 1.3.3 Program Design and Best Practices

The Program will utilize the following elements and best-practices to overcome identified market barriers:

Market Barrier	Barrier Details	Proposed Program Elements and Best-Practices to Overcome Barriers
Lack of awareness, incentive, and technical knowledge	MSB customers’ limited internal resources require them to prioritize what is perceived to have a direct impact on achieving business goals. EE is typically not included since its not an obvious or simple topic to connect to impacts on the business, therefore does not earn attention	<ul style="list-style-type: none"> <li>Conduct outreach explicitly to MSB through multiple channels they already are engaged with</li> <li>Provide education and connection to the tangible benefits of prioritizing EE activities and upgrades</li> <li>Promote the simplicity of program services that enable prioritization of EE</li> </ul>

Market Barrier	Barrier Details	Proposed Program Elements and Best-Practices to Overcome Barriers
Lack of time and resources to dedicate to energy improvements	MSB customers are unable to identify, evaluate, and install energy efficiency projects, especially within DACs due to small budgets and available staff to manage or prioritize EE improvements	<ul style="list-style-type: none"> <li>▪ Simple program process to qualify and install EE upgrades within a single visit</li> <li>▪ Program staff and Trade Ally provided as supplemental resource for MSB to facilitate EE decision-making</li> <li>▪ No-cost and low-cost EE installation</li> </ul>
Leased facilities or equipment	MSB sites typically lease their facility and equipment often times making it not possible or permitted for improvements to occur, or for them to receive full benefits of an improvement for the cost they assume for an upgrade.	<ul style="list-style-type: none"> <li>▪ Program offers measures that would not require landlord approval, permitting or significant construction</li> <li>▪ Measure mix variety includes equipment replacement as well as non-construction improvements and those that supplement equipment operation</li> </ul>
Complexity of traditional programs	MSB typically require simple and small solutions with hand-holding services, which do not align with traditional program designs focused on large scale project scopes and energy savings targeting more self sufficient customer types	<ul style="list-style-type: none"> <li>▪ Program services designed to cater to needs of MSB, and focus on DAC/HTR promotion</li> <li>▪ Program Trade Ally role meant to provide concierge-like, single point of contact services and response</li> <li>▪ Participant follow up and check in built into program process</li> </ul>
Lack of engagement from the market	Due to scale of potential projects at an MSB site, they are not proactively engaged by traditional EE programs or contractors since it is not cost effective to do so. These programs typically are not structured to enable MSB customer self-service or simple navigation	<ul style="list-style-type: none"> <li>▪ Program outreach leverages existing channels that cater to MSB and DAC communities, e.g. CAGBN, CBOs</li> <li>▪ Intentional and exclusive program targeting of MSB DAC and HTR community members</li> <li>▪ Program Trade Ally network members assembled for and tasked with targeted service to MSB DAC</li> </ul>

Market Barrier	Barrier Details	Proposed Program Elements and Best-Practices to Overcome Barriers
Lack of trust in contractors or program staff	MSB and DAC lack resources to become familiar with utility offerings, and typically are not engaged by traditional EE program so intentional promotion by program staff or contractors is met with skepticism and distrust	<ul style="list-style-type: none"> <li>▪ Broad and targeted promotion of the program through channels already utilized and trusted by MSB and DAC.</li> <li>▪ Program training of Trade Ally Network addresses proper promotion of program value case, service offering legitimacy and connection with utility services</li> </ul>

### 1.3.4 Innovation

The Simplified Savings Program design as a whole presents an innovative method of addressing several gaps in service to customers historically left underserved or unserved by traditional energy efficiency program designs.

Historically, small customer focused programs offered a single approach and avenue for these customers to participate resulting in some customers, whose circumstances were a ‘bad fit’ for that approach unserved. By offering three pathways of benefit, the goal is to provide options for ‘best fit’ which address individual customer needs and resources. As an equity program, this program does not bear the burden of traditional NTG or TRC metrics and thus can address non-energy benefits such as increased comfort and safety, optimizing use of existing equipment, and behavioral changes which may result in bill savings. The Direct Install and Retrofit pathways build on these non-energy benefits and may also deliver bill and energy savings.

Offering customers multiple pathways and choices addresses on of key metrics of this program include tracking not only of how many customers are served, but also how many are Hard to Reach and/or located in Disadvantaged Communities. As well, all levels of participation are expected to produce a degree of bill savings which is also an innovative metric with respect to traditional programs offered in this segment.

Program services align with the known needs and barriers of the target market, offering no-cost and low-cost services, information and education that encourages long-term prioritization of DSM decision-making and supports the growth of relationships between DAC and HTR community businesses and DAC/HTR focused Trade Ally Networks.

Program team is comprised of a healthy balance of specialists experienced with serving DAC and HTR communities as well as navigating utility DSM program design and implementation. This intentional combination will serve as a bridge between traditional energy efficiency program practices and ensuring genuine customer and market benefits are obtained by program participants, as well as inform future program design in the DSM space that may seek to leverage best practices established by Simplified Savings Program.

The program will leverage Resource Innovations iEnergy Program Management cloud-based software platform to facilitate streamlined and effective operations of all aspects of the program. This tool will ensure seamless transactions between customers, Trade Ally Network and program management, allowing for high degree of customer and Trade Ally engagement and real-time reporting and data-driven evolution to program strategies.

### 1.3.5 Metrics & Indicators

Program progress will be tracked through the following metrics and indicators.

Metrics:

- Number of Customers Served
- Annual Bill Savings

Key Performance Indicators:

- Non-energy Benefits through market support activities
- Disadvantaged Worker participation
- Supplier Diversity budget spend
- Program Data Quality ensuring most accurate measurement of the equity model of indicators.
- Participation Satisfaction
- Claimable Savings
- Energy Savings in DACs
- Measure Install Pass Rate

### 1.3.6 For Programs claiming to-code savings

Not applicable.

### 1.3.7 Pilots

Not applicable.

### 1.3.8 Workforce Education and Training

Formal workforce education and training is not budgeted for nor included in this program. However, due to its use of a local Trade Ally Network, the Program will increase awareness and training of energy efficiency benefits, as well as best practices for installing energy saving equipment and use of EE as a sales tool to program trade ally network members that work among DAC and HTR communities. This direct engagement with the workforce will provide informal contribution to WE&T desired outcomes.

### 1.3.9 Workforce Standards

Workforce standards for both HVAC Measures and Advanced Lighting Control Measures are applicable to the Simplified Savings Program on a project-by-project basis, as dictated in D. 18-10-008. Resource Innovations will provide training on Workforce Standards to participating Trade Allies who may be responsible for installing the covered measures. It is unlikely that a project will trigger these standards due to size and measure type, however if it does, Resource Innovations will document trade ally qualifications and provide to PG&E upon request.

### 1.3.10 Disadvantaged Worker Plan

Resource Innovations, through its subcontractor Environmental Innovations is affiliated with Workforce Development Boards across PG&E territory and understand where to find individuals that fit the requirements for training and are most in need of work. For Simplified Savings Program, Environmental Innovations will:

- Recruit new TAs and other individuals through connections with Workforce Development Boards, especially in underserved or DACs
- Leverage CBOs to support efforts in employing individuals with the right culture and language fit for a particular community.
- Provide program materials and training in multiple languages to facilitate the promotion and use of the program among underserved or DACs
- Resource Innovations will track and report metrics associated with supplier diversity and disadvantaged worker participation

Disadvantaged Worker information will be initially collected during the onboarding process for all subcontractors. We will send voluntary surveys to the participating workforce on an annual basis in order to track the program participation and training efforts of disadvantaged workers. Responses to the surveys will be completely anonymous and will only be used for understanding and reporting on disadvantaged worker participation in the Advanced Energy Program.

### 1.3.11 Additional information

None

# 1.4 Supporting Documents

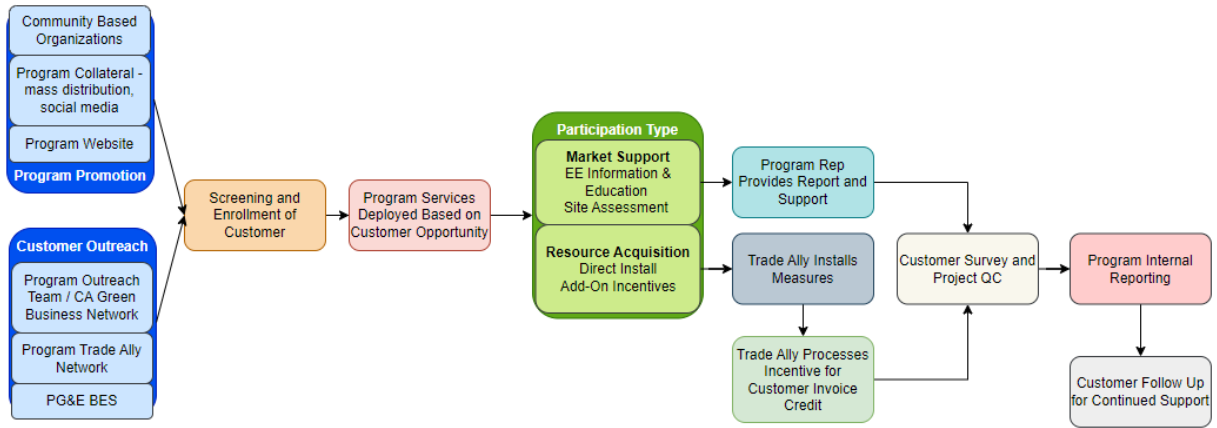
## 1.4.1 Program Manual

Provided in a separate document

## 1.4.2 Program Theory and Program 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	<ul style="list-style-type: none"> <li>Provide DI measures at no, or low, cost to the customer</li> </ul>	<ul style="list-style-type: none"> <li>Simplified DI measure list</li> <li>Incentives for highest value measures</li> <li>Measure catalogue in Onsite Assessment Tool</li> <li>Direct buy down of project costs</li> </ul>			
Difficult and Expensive to Reach and Serve	<ul style="list-style-type: none"> <li>Leverage CBOs &amp; local CAQBN coordinators</li> </ul>	<ul style="list-style-type: none"> <li>Engaged, trusted program coordinators</li> <li>Localized, engaged expertise</li> <li>Increased awareness in energy efficiency benefits</li> <li>Expanded awareness of other programs such as IDSM, EVs, etc.</li> <li>High customer satisfaction</li> </ul>			
Lack of Awareness, Incentive, and Technical Knowledge	<ul style="list-style-type: none"> <li>Conduct targeted marketing and outreach in communities considered DACs / HTRs</li> </ul>	<ul style="list-style-type: none"> <li>Expanded, localized customer marketing and outreach specific to the needs of DACs/ HTRs/prioritized areas</li> <li>Messaging that speaks to the customer where they are (i.e., high fire areas, multilingual, segment specific)</li> </ul>	<ul style="list-style-type: none"> <li>Immediate realized benefits through streamlined process</li> <li>Enhanced customer trust and awareness of program offerings</li> <li>75% or more participants are from DAC locations</li> </ul>	<ul style="list-style-type: none"> <li>Delivery of cost efficient energy and HCS benefits</li> <li>Significantly increased MSB engagement and participation in DACs/HTRs</li> <li>Improved TA presence and engagement with DAC and HTR customers</li> <li>Improved customer satisfaction</li> <li>Increased program awareness and participation in DSM / peak load reduction opportunities</li> </ul>	<ul style="list-style-type: none"> <li>Achieve deep penetration with customers in DAC / HTR communities with increased HCS and resiliency as well as energy benefits</li> <li>ESJ Goal 5: Enhanced outreach and public participation by ESJ communities in CPUC's decision-making process and benefit from CPUC programs</li> <li>Ensure compliance with all CPUC policies while maintaining an element of nimbleness and flexibility that can ensure high stakeholder satisfaction</li> <li>Increase adoption rates of EE and IDSM programs that result in decreased GHG emissions in DACs</li> </ul>
Lack of Time and Trust	<ul style="list-style-type: none"> <li>Deploy a locally based trade ally network</li> </ul>	<ul style="list-style-type: none"> <li>Pre-vetted, diverse Trade Ally network</li> <li>Assessment tools provided to TAs</li> <li>Provide on-going training, QA/QC, &amp; inspections</li> <li>Allow customer to choose TAs</li> <li>Concierge level service to facilitate streamlined program participation</li> </ul>	<ul style="list-style-type: none"> <li>Well-trained, experienced TA and CBO network to deliver program services</li> <li>Targeted average of 5% in bill savings, with a priority for peak demand savings</li> </ul>		
Split Incentive	<ul style="list-style-type: none"> <li>Develop tools to synthesize and facilitate participation in relevant DSM programs</li> </ul>	<ul style="list-style-type: none"> <li>Offer energy assessments at no cost to the customer</li> <li>Post-assessment, provide customer with optimized project plan that details project savings potential, incentive opportunities, other program options, and available financing tools</li> <li>Offer opportunities for ongoing engagement e.g., CAQBN certification</li> </ul>			
Lack of Capital / First Cost	<ul style="list-style-type: none"> <li>Provide financing options</li> </ul>	<ul style="list-style-type: none"> <li>Standardized on-bill financing and CHEEF small business program offerings</li> </ul>			

### 1.4.3 Process Flow Chart



#### 1.4.4 Incentive Tables, Workpapers, Software Tools

Simplified Savings Program will install no-cost and low cost measures. No cost measures will be covered by a deemed material and labor payment that was agreed upon with PG&E. These values are proprietary. The program will also provide incentive payment for Add-On measures, which are summarized in the following table:

Add-On Measure Name	Unit	Incentive Rate
2-Lamp Linear LED Lamp Hardwired retrofit	Each	\$20.00
3-Lamp Linear LED Lamp Hardwired retrofit	Each	\$30.00
Auto door closers - reach-in	Each	\$100.00
ECM Motors for display cases and walk ins	Each	\$50.00
Electric to Electric Water Heater	Each	\$500.00
Evap fan coolers for walk in	Each	\$50.00
Heat pump replacing a gas furnace	CAP-Tons	\$1,000.00
Heat pump replacing a heat pump	CAP-Tons	\$1,000.00
Indoor Low Bay Lighting: LED Fixtures	Fixture	\$75.00
Interior LED Fixtures - General	Each	\$75.00
LED Fixture Retrofit Kit	Each	\$50.00
Refrigerated Display Lighting	linear foot	\$2.00
Variable Frequency Drive Motors	Rated-HP	\$50.00
Window Film	glass square foot	\$5.00



### 1.4.4.1 Workpapers

Simplified Savings Program will base savings for measures installed on existing or pre-existing deemed workpapers. The Program will base claimable savings achieved through its Resource Acquisition Participation service based on workpapers that are currently approved. Below is a table that outlines the Workpaper that will be used for bill savings and/or energy savings and demonstrates which have claimable energy savings. It also delineates Direct Install from Add On measures.

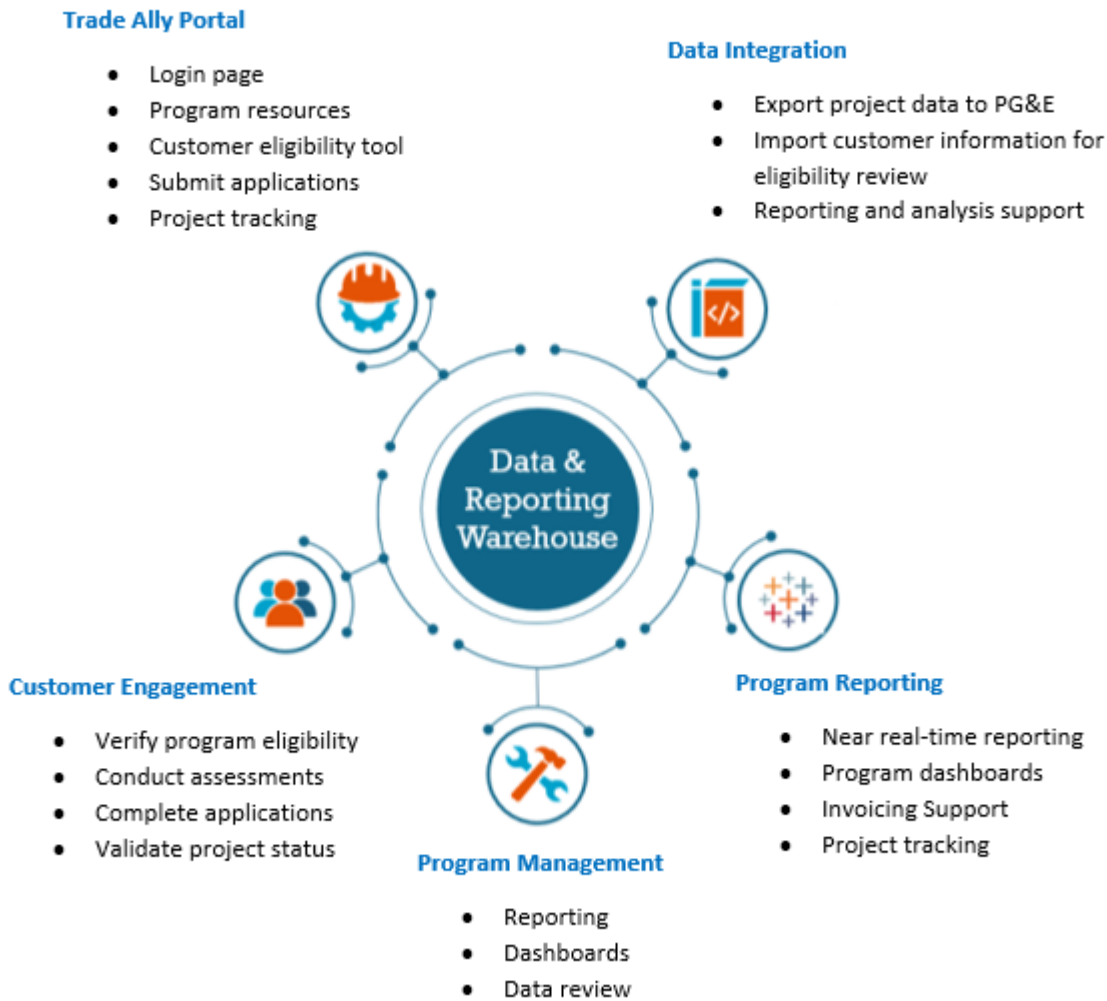
Measure Name	CPUC Workpaper or DEER	Claimable Savings (Yes / No)	Direct Install or Add On
Smart thermostats	SWHC039-04	NO	DI
LED lamps (int and ext) pin and screw based lamps	PGECOLTG165	NO	DI
Refrigerator and ice machine gasket and coil cleaning	PGECOREF105	NO	DI
Bluetooth smart power strips	SWAP010-01	NO	DI
Occupancy sensing wall switches	PGE3PLTG183 Occupancy Sensors, DI	NO	DI
Room air purifiers	SWAP008-01	NO	DI
Faucet aerators	SWWH019-03	YES	DI
Pre rinse spray valves	SWFS013-01	YES	DI
Auto door closers - walk-in	SWCR005-02	YES	DI
Pipe insulation	PGECOREF113	YES	DI
Smart outlets and timers for vending machines	SWWH017-02	YES	DI
LED troffer kits 2X2	SWAP011-02	NO	DI
LED troffer kits and fixtures 2X4	SWLG012-01	NO	DI
LED recessed downlight retrofit kit	SWLG012-01	NO	DI
Type A LED tubes (not B & C listed)	PGECOLTG175	NO	DI

Measure Name	CPUC Workpaper	Claimable Energy Savings	Direct Install or Add On
Auto door closers - reach-in	SWCR005-02	NO	AO
Evap fan coolers for walk in	SWCR004-01	YES	AO
2-Lamp Linear LED Lamp Hardwired retrofit	SWLG018-01	NO	AO
3-Lamp Linear LED Lamp Hardwired retrofit	SWLG018-01	NO	AO
Interior LED Fixtures - General	SWLG012-01	NO	AO
Indoor Low Bay Lighting: LED Fixtures	SWLG011-03	YES	AO
LED Fixture Retrofit Kit	SWLG012-01	NO	AO
Heat pump replacing a gas furnace	SWHC046-01	YES	AO
Heat pump replacing a heat pump	SWHC014-02	YES	AO
Electric to Electric Water Heater	SWWH031-01	YES	AO
Refrigerated Display Lighting	PGECOLTG174 - LED Refrigeration Case Lighting	NO	AO
ECM Motors for display cases and walk ins	SWCR003-01	YES	AO
Variable Frequency Drive Motors	SWHC018-02	YES	AO
Window Film	SCE13HC002.2 Reflective Window Film	NO	AO

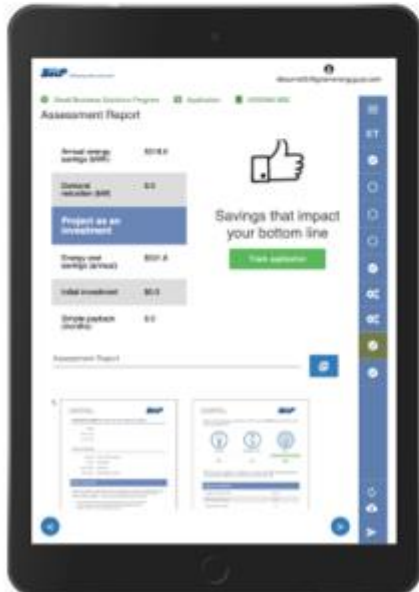
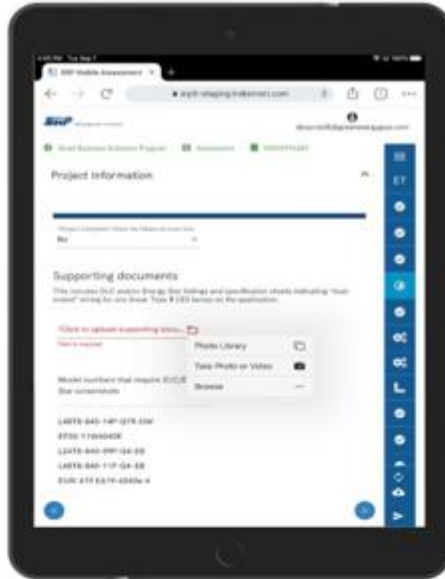
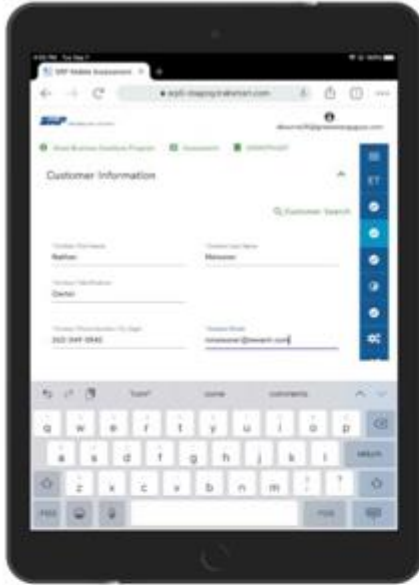
#### 1.4.4.2 Software Tools

Simplified Savings Program will utilize Resource Innovations iEnergy Program Management cloud-based software platform to facilitate streamlined and effective operations of all aspects of the program; including but not limited to customer outreach and engagement, trade ally network coordination and management, tracking project, incentive, assessment and survey data, and real time insights and reporting.

Simple diagram of iEnergy Program Management platform:



Screenshots of the auditing component of the platform, named OnSite which will be deployed in support of the Program’s outreach and customer support activities.



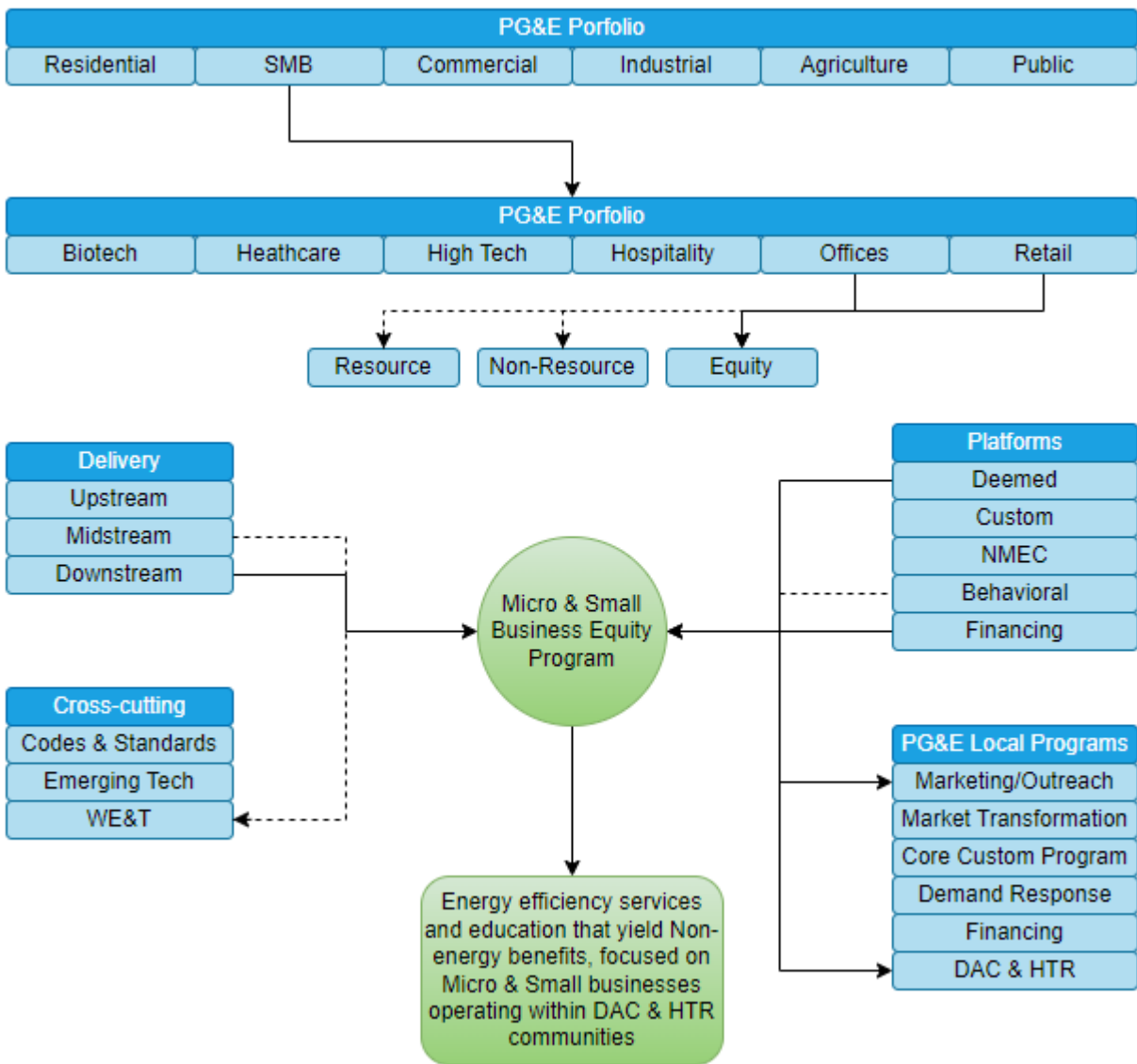
### 1.4.5 Quantitative Program Targets

See section 1.2 for details about program budget and goals.

Simplified Savings Program will target a total of 7,500 participants over 3 years where participation levels is expected to be split into Market Support (MS) or Resource Acquisition (RA), of which 75% of the participants will be DAC and 17% of participants will be outside of DAC but considered HTR.

CUSTOMERS SERVED				7,500
	2023	2024	2025	
MS	1,050	1,200	750	3,000
RA	1,575	1,800	1,125	4,500
<i>DAC = 75%</i>				
MS	788	900	563	2,250
RA	1,181	1,350	844	3,375
<i>HTR Outside DAC = 17%</i>				
MS	179	204	128	510
RA	268	306	191	765

### 1.4.6 Diagram of Program



### 1.4.7 Evaluation, Measurement & Verification (EM&V)

Verification for Resource Acquisition Participants will happen at the project level with TAs submitting 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.

The Program will capture the project information in the Resource Innovations' Program Management Platform making it easily accessible to reviewers and inspectors via the web-accessible project facilitation software tool, whether conducting virtual or in-field inspections.

The Program will use their mobile assessment and inspection tool (MAT) to streamline the post-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 MAT has an online checklist to validate projects and uses specific criteria to conduct inspections based on each project's approved measures. During the post-inspection process, Implementer will:

- Select projects based on a randomized sampling or based on past performance of the contractor;
- Verify measure eligibility, installation, and quality of commissioning by completing checklists based on established procedures and criteria;
- Work with the customer and/or contractor to resolve any discrepancies, if applicable; and
- Inspectors will finalize, record, and track all quality assurance findings and any necessary project remediations.

Verification for Market Support Participants will be tracked within the Program Management Platform for those receiving energy education/energy tips and/or assessments. This will include customer contact information, date of interaction, and any other program outcomes (e.g., referral to another program, referral to a TA for Direct Install measures).

Bill savings will be calculated by using measure savings values as codified in the Simplified Savings Measure List multiplied by the average blended electric and gas rates for MSB customers as provided by PG&E (\$0.30/kWh and \$1.50/therm).

### Third-Party Performance Data Collection Plan

Implementer will use a data-driven approach to provide effective and comprehensive end-to-end data collection, analysis, and reporting in order to drive continuous improvement to reduce risk and increase participation, savings, forecast accuracy, and cost-efficiencies. Table 6 summarizes the data types and sources, and frequency of use, which will be considered for internal use only for Implementer's program management and reporting purposes, and shared only with PG&E.

**Table 6. Program Data Description and Cadence**

Outreach and Marketing Reports to track Program operations, increase forecasting accuracy, and analyze the effectiveness of marketing spend and pivot.	
Frequency: Monthly Data Sources: <ul style="list-style-type: none"> <li>• iEnergy OnSite</li> <li>• Contractor management software</li> <li>• Web analytics engine</li> <li>• Salesforce customer relationship manager (CRM)</li> </ul>	Sample Data Points: <ul style="list-style-type: none"> <li>• Pipeline: Number/percent of projects by stage and aging</li> <li>• Website Metrics: Page views, time per page</li> <li>• Campaign and Reach Metrics: Number of customers engaged, conversion rates</li> </ul>
Customer Data and Firmographics to assess and develop projects, maintain effective customer communications, and track Program operations and customer satisfaction KPIs.	
Frequency: Quarterly Data Sources: <ul style="list-style-type: none"> <li>• iEnergy Onsite</li> <li>• Customer Applications</li> <li>• Salesforce CRM</li> <li>• Customer satisfaction survey</li> </ul>	Sample Data Points: <ul style="list-style-type: none"> <li>• Facility Data: Type, location, size</li> <li>• Systems and Equipment Information</li> <li>• DAC/HTR Status</li> <li>• Satisfaction Ratings</li> <li>• Contact Information</li> </ul>
Program Management to assess overall Program performance vs. goals, review energy/bill savings and Program operations, KPIs, and identify underperforming areas and create action plans.	
Frequency: Monthly Data Sources: <ul style="list-style-type: none"> <li>• iEnergy Program Management,</li> <li>• PG&amp;E's Energy Insights Database</li> </ul>	Sample Data Points: <ul style="list-style-type: none"> <li>• Program deliverables and milestones</li> <li>• Budget metrics: Percent spent vs. goal</li> <li>• Realized vs. Forecasted Energy Savings</li> <li>• Bill Savings &amp; Benefits in DACs</li> <li>• Non-Energy Benefits</li> <li>• Measure and Cost Project Details</li> <li>• Safety, diversity, and compliance: Incidents, accuracy of incentives processed, diverse business spend</li> </ul>
TA/Subcontractor Management to highlight areas for improvement, identify TAs and subcontractors for rewards and recognition, forecast and allocate resources, and track and report on customer satisfaction and Program KPIs.	
Frequency: Monthly with quarterly and annual roll-up Data Sources: <ul style="list-style-type: none"> <li>• iEnergy OnSite</li> <li>• Contractor management software</li> <li>• Salesforce CRM</li> <li>• Customer/Project Applications</li> </ul>	Sample Data Points: <ul style="list-style-type: none"> <li>• Pipeline: Number/percent of projects by stage, aging metrics</li> <li>• Conversion Rates</li> <li>• Savings vs. Targets</li> <li>• Measure Mix</li> <li>• Referrals</li> <li>• TA Satisfaction</li> </ul>



### 1.4.8 Normalized Metered Energy Consumption (NMEC)

Not Applicable



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Internal