

2023 – 2026 Business Energy Efficiency Surveys (BEES)

Non-Residential Energy Efficiency Program

- 1. Program Name:** Business Energy Efficiency Surveys (BEES)
Program ID: SCG3909
Program Type: Non-Residential Energy Efficiency Program

- 2. Program Overview**

The BEES program is a non-residential energy assessment program that offers SoCalGas customers no-cost energy surveys and referrals to applicable energy efficiency, and water conservation programs. Services include hosting educational webinars for each non-residential sector, customer screening and acquisition, report generation and presentation to customers, [and](#) follow-up calls and meetings with other energy efficiency programs to drive constant improvements.

- 3. Program Budget and Savings**

- a. Program / Sub-program Budget Table**

Table 1: BEES Program Cost Budget by Category

Cost Category	2023	2024	2025	2026	Total
Administration	\$55,896	\$75,580	\$75,580	\$19,394	\$226,450
Marketing	\$25,750	\$25,750	\$25,750	\$2,530	\$79,780
Direct Implementation – Non-Incentive	\$546,894	\$648,470	\$648,570	\$165,686	\$2,009,520
Total Budget	\$628,540	\$749,800	\$749,800	\$187,610	\$2,315,750

- b. Program / Sub-program Gross Impacts Table**

- i. N/A, this is a non-resource program

- c. Program / Sub-Program Cost Effectiveness (TRC)**

- i. N/A, this is a non-resource program

- d. Program / Sub-Program Cost Effectiveness (PAC)**

- i. N/A, this is a non-resource program

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

- i. Third Party Delivered

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

- i. Commercial
- ii. Industrial
- iii. Agricultural

The list above is the targeted market sector with hard-to-reach (HTR) and disadvantaged community (DAC) goals

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

- i. Non-Resource

h. 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.

- i. Market Channels
 - 1. N/A, this is a non-resource program
- ii. Intervention Strategy
 - 1. Audit
 - 2. Technical Assistance
 - 3. Facilitating Customer and EE Program Engagement
 - 4. Education Outreach
 - a. Webinars
 - b. Assessment Review with Customers
- iii. Campaign Goals
 - 1. Engaging Equity Customers
 - 2. Increased Energy Efficiency
 - 3. Water Conservation
 - 4. Education and Outreach
 - 5. Continuous Improvement
- iv. Timeline
 - 1. 3 years (Q2 2023 – Q1 2026)

4. Implementation Plan Narrative

a. Program Description

The program implementer (PI) has proposed and developed a nonresidential energy advisory program called Business Energy Efficiency Surveys-~~(BEES) Program (BEES)~~ to bring together, under one program, all services offered to support customer education, participation in energy efficiency, self-generation energy reducing opportunities and benefits, along with awareness of greenhouse gas and water conservation activities.

The program's overarching objective is to promote energy savings by helping customers, including ~~hard to reach (HTR)~~ and ~~disadvantaged communities (DAC customers.)~~ understand how to benefit from these programs through reduced energy consumption, and participation in SoCalGas energy efficiency programs. These benefits include access to tools that will promote energy efficiency and extend participation in other energy efficiency programs that are offered.

~~The energy efficiency surveys program~~BEES will deliver offerings of targeted customer engagement, data collection and assessment, tailored reports, report reviews and education, customer follow up, coordination with SoCalGas programs, and data driven improvement.

The PI will conduct its own marketing strategies to produce leads, as well, will work closely with SoCalGas to receive customer lead lists. The PI will categorize customers by market sector, consumption threshold, and DAC/HTR classifications. The PI will also coordinate with IOUs and municipal utilities within SoCalGas's service territory to refer eligible customers to the BEES Program.

~~The PI will meet with eligible customers and establish the customer needs, priorities, financial situation, and gather site-specific information hosted on the PI's database. The database will auto generate a custom report for the customer; recommending behavior changes, equipment replacements, estimated energy savings, SoCalGas energy efficiency programs, and contact information of recommended programs. Upon completion of data collection, the PI-s will then review the generated report with each customers. This will allow customers to fully understand the recommendations and ask questions which will support increased program participation. One to two weeks later the PI will conduct follow-up calls with each customers to determine if they implemented or plan on implementing any recommendations, enrolled or plan on enrolling in any other programs, or had any other questions.~~

In coordination with SoCalGas ~~programs~~, the PI will follow-up with energy efficiency programs to gauge if they are contacting generated leads, are noticing program impact as a result, or have any additional feedback.

b. Table 2 – The Program Implementer Total Assessment Goals:

Site Type	PY-2023	PY-2024	PY-2025	PY-2026
Commercial	372	505	505	132
Industrial	168	225	225	55
Agricultural	29	39	39	10
Total	569	769	769	197

Table 2: Provides estimated projection goals for site assessment audits over the course of 3 years for this program.

Site Type	PY-2023	PY-2024	PY-2025	PY-2026
Commercial	372	505	505	132
Industrial	168	225	225	55
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Total	569	769	769	197

c. Program Delivery and Customer Services

Program marketing and outreach are central to driving program participation sufficient to support statewide energy efficiency goals. To achieve high program participation, the PI will enact a multifaceted approach using targeted customer outreach, cross-program referrals from municipal utility programs, SoCalGas referrals and energy efficiency webinars.

Property Targeting and Engagement: The first step in the PI’s marketing and outreach strategy is identifying targets based on customer sectors and prioritizing DAC and/or HTR customers. To do this, the PI will analyze third-party demographic and firmographic data. The PI will collaborate with SoCalGas energy efficiency programs to target priority customer segments or segments that are having trouble have low penetration.

The second step is to develop marketing materials and program resources that clearly explain how the program works, the benefits of participation and how to start the participation process. The PI will work alongside SoCalGas to develop program materials appealing to the target audience. The PI will develop promotional collateral, including emails, fact sheets, brochures, and educational materials. These materials will be used by outreach staff and include information about BEES processes, upcoming webinars, and participant testimonials. Working with SoCalGas’ marketing staff, the PI will make necessary updates and collaborate on collateral for special campaigns or needs.

Cross-program Referrals from Municipal Utility Programs: The PI will work closely to target municipal utility customers located within the IOU’s service territory to achieve program goals. For example, the PI partners with several municipal utilities to support various programs for commercial customers. When these customers are also SoCalGas customers, the PI will refer them to the BEES Program if they are an appropriate fit.

PI Generated & SoCalGas Referrals: The PI will conduct its own marketing to generate leads. In addition, the PI will work with SoCalGas to receive customer contact data, adhering to all security protocols, so that the PI can create further lists.

Non-Residential Energy Efficiency Webinars: The PI will conduct quarterly webinars tailored for each market sector to inform them about the program. The PI will coordinate with SoCalGas to allow other non-residential energy efficiency programs to present information about additional program offerings.

The PI will evaluate the success of each marketing, education-outreach strategies, and activities quarterly, eliminating or revising strategies not driving outcomes and activating innovative approaches that engage target audiences in new ways to achieve the program's forecasted energy savings.

d. Program Design and Best Practices

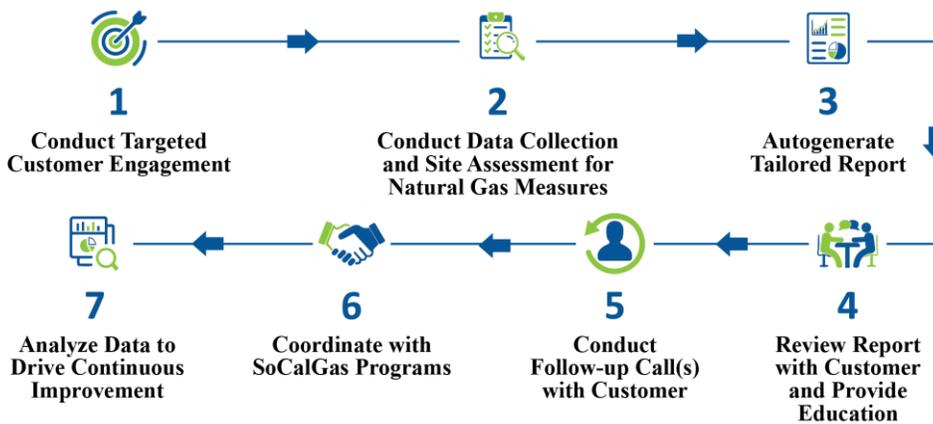
The PI will provide energy assessment audits to agricultural, commercial, and industrial clients. Furthermore, the PI may partner with a sub-contractor who will focus on serving the agricultural and industrial sectors.

The PI has designed the BEES Program such that it emphasizes customer education through comprehensive focused energy assessments tailored to each sector. The PI will drive participation by providing a seamless experience that is attuned to customer needs and challenges, minimizes customer touches, makes it easy to understand and take advantage of recommendations. For key aspects of program detail please see

Figure 1

Figure 1 below:

Figure 1: Key Aspects



Targeted customer engagement: The PI will conduct its own marketing to generate leads. In addition, the PI will work closely with SoCalGas to receive customer lead lists and categorize them by market sector, consumption threshold, as well as DAC and HTR classifications. This will allow outreach personnel (Canvassers) to target customers strategically to drive program participation. The PI will coordinate with IOU's and municipal utilities in SoCalGas' service territory to refer eligible customers to the BEES Program. The PI will also coordinate customer webinars to inform them about BEES and other non-residential programs. Canvassers will prescreen all customers for eligibility prior to scheduling a site assessment ~~appointment~~.

Data collection and site assessment: The PI's Assessors will meet with customers to conduct interviews and site assessments tailored to the customer's market sector. Through this process, customer needs will be established, in conjunction with, priorities, financial situation, and site-specific information.

Tailored report: The database will then autogenerate a custom report recommending ways the customer can potentially be more energy efficient. This will include behavior changes and equipment replacements as well as estimated energy and monetary savings associated with the recommendations. The report will also include descriptions of other energy efficiency programs and contact information for SoCalGas energy efficiency programs that the customer is able to leverage ~~to for a each~~ specific site and situation.

Report review and education: Assessors will review the report with the customer during the site assessment appointment. This will allow the customer to fully understand the recommendations and ask questions. Reviewing the report at the ~~time completion~~ of the assessment will increase program participation. In the PI's experience, the longer the time between the appointment and follow-up, the more likely the customer ~~will~~ is to not proceed with ~~the any~~ program ~~participation~~. This process will make it easy and convenient for the customer to participate. The PI will also forward the report and customer contact information to the referenced energy efficiency programs so that ~~a SoCalGas program advisor they~~ can follow-up with the customer. This will help ensure that customers take advantage of relevant energy efficiency opportunities.

Customer follow-up: The PI will conduct up to a 15-minute follow-up call with customers one week after the site assessment and again at two weeks, to determine if customers implemented or ~~plans to on~~ implementing any recommendations, enrolled ~~or plans on enrolling~~ in any programs, or have any questions. If customers have not taken any action, the PI will seek to understand why and gather feedback on what ~~PI our team can further offer or~~ could have done differently to have the customer participate.

Coordination with IOU programs: The PI will also conduct regular calls with SoCalGas energy efficiency programs to gauge if programs are following up with leads, are noticing an impact to programs because of referrals or have any additional feedback. This type of coordination motivates programs to follow-up ~~with~~ leads if programs have not ~~and will help fine tune the leads provided~~.

Data-driven continuous improvement: The PI will track all data and feedback received in an internal database. The PI will regularly share data with SoCalGas, and the database can produce customized reports and dashboards. The PI will ~~periodically~~ share its analysis with the SoCalGas' non-residential programs.

e. **Innovation**

First and foremost, if programs do not fit customer needs and priorities or are not easily accessible and convenient, participation suffers. Therefore, the PI has designed a program that creates a customer experience that is tailored to customer sectors and makes it easy for customers to follow through on recommendations. Innovative elements of the design include:

Customers will be served in a single appointment. The ~~PI's~~ **BEES** program will serve customers in one appointment; ~~it~~ conduct the assessment, generate the report, and review the information with the customer all during the same visit. The PI will share the information with other SoCalGas energy efficiency programs for which the customer may be eligible. This proactive approach will be more convenient for customers and support increased program participation.

Assessment reports will be tailored and easily understandable. The PI's internal database will autogenerate reports immediately following the energy assessment, tailoring all information produced to the customer's needs, priorities, and sectors. Among the recommendations, other SoCalGas programs and contact information will also be available to the customer. This will provide ease of access for the customer to take advantage of programs and help mitigate potential program dropouts, especially for DAC and HTR customers who have greater participation barriers.

Customer follow-ups will support implementation of recommendations. The PI will conduct two follow-up calls with customers, one week and two weeks after the assessment appointment. The PI will ask customers if they have proceeded or would like to proceed with any recommendations, ~~and, if~~ they have not, the PI will inquire as to the reason. The PI will also inquire about customers' overall program experience. This will encourage customer follow through on recommendations and allow the PI to adjust its approach, if needed, to improve customer experience and drive participation.

Coordination with IOU programs will support continuous improvement and achievement of goals. The PI will meet with and seek feedback from SoCalGas ~~programs~~. During regular calls, the PI will ask whether SoCalGas programs followed up with participating customers, have seen an impact due to leads, and whether they have any feedback on the customers that were referred. This feedback loop will allow the PI to improve ~~its~~ its approach continuously to ensure the achievement of program goals.

Webinars will further inform customers of BEES and IOU program offerings. The PI anticipates hosting quarterly webinars ~~for~~ tailored to each customer sector served (commercial, industrial, and agricultural) to raise awareness of the BEES Program. The PI will coordinate with other SoCalGas energy efficiency programs so more information can be communicated to eligible customers.

~~As well, the PI will work closely with SoCalGas to expedite contact leads. Furthermore, the PI will conduct and participate in several webinars tailored to each sector to inform about SoCalGas programs.~~

f. **Metrics**

- i. Reference KPI attachment

g. Workforce Education and Training

- i. Expand/initiate partnerships with entities that do job training and placement.
 - 1. The PI has experience managing energy efficiency, water conservation, outreach, and other programs throughout California. The PI has developed strong partnerships with utilities, municipalities, water agencies, state organizations and more. As a result, the PI has numerous strategic partnering opportunities that can be drawn from and holds vast knowledge of program offerings, including those in the non-residential sector
- ii. Require placement experience for any new partners in the workforce, education, and training programs and new solicitations.
 - 1. Coordination with industry partners that provide training and job-related services such as the Career & Workforce Readiness program, workforce development partners, community colleges, apprenticeship programs, career centers and community-based organizations to outreach to communities through job fairs, community events, social media, and other digital outlets
- iii. Require “first source” hiring from a pool of qualified candidates, before looking more broadly, beginning with self-certification
 - 1. The PI will work with contractors who have historically served HTR and DAC customers and are hired from those communities.
- iv. Facilitate job connections, by working with implementers and contractor partners, and utilizing energy training centers.
 - 1. PI will work with numerous municipal utilities in SoCalGas territory to provide energy audits, outreach, and technical assistance services. Additionally, the PI will use existing relationships to assist in establishing agreements between municipal utilities who have existing audit/assessment programs to leverage programs to serve overlapping customers cost-effectively. The PI has numerous grassroots partners who can be utilized to engage DAC and HTR populations. As a part of the BEES Program, the PI will maintain comprehensive knowledge of existing energy efficiency programs in the non-residential sector. This knowledge will be used to not only appropriately refer customers to SoCalGas programs, but to also co-exist with other IOU programs of similar scope. Overall, the PI will maintain awareness of such programs to support the efficient and effective operation of the BEES Program.

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e. Work Force Standards

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The PI has more than 14 years of experience providing comprehensive assessments and audits for non-residential customers. The PI's team has conducted approximately 5,900 assessments/audits [within](#) the last five years.

The PI's experience working on utility energy programs creates an intimate and familiar experience with the regulatory landscape and CPUC policies. Such experience includes:

- Developing program installation standards inclusive of CPUC guidance as a SoCalGas Technical Consultant
- Attending all relevant CPUC hearings and Low-Income Oversight Board meetings to gain holistic insight into the issues, politics and stakeholders impacting energy efficiency programs
- Following intervenor responses to understand political dynamics and potential impacts
- Working with allied industry partners and stakeholders to support the development and implementation of program innovations
- Supplying data and analysis for regulatory reporting and satisfying CPUC requests
- Maintaining familiarity with and following all CPUC policies relevant to third-party, multifamily, and custom projects

f. Disadvantaged Worker Plan

The PI is certified as a Minority Business Enterprise (MBE) by the Southern California Minority Supplier Development Council, an affiliate of the National Minority Supplier Development Council. If the need arises to add additional subcontractors in the future, the administration will prioritize MBE subcontractors and support a robust supplier diversity program. The PI reaffirms that CPUC Disadvantaged Worker requirements apply to the BEES program. As an MBE, the PI will engage thoughtfully in the recruiting process to attract, hire, and retain individuals well-suited for work. The PI hires diverse candidates and strives to facilitate an environment where all team members feel safe showing up authentically.

The PI's approach to supporting job access for Disadvantaged Workers will include:

- Requiring recruiting practices that actively promote workplace diversity, equity, and inclusion, including redacting personal information (name, gender, and educational institutions) from applications and resumes during initial reviews to address unconscious bias, tracking demographic data of applicants, hires, and accepting work experience in lieu of education

- Coordinating with industry partners that provide training and job-related services such as the Career & Workforce Readiness program, workforce development partners, community colleges, apprenticeship programs, career centers and community-based organizations to outreach to communities through job fairs, community events, social media, and other digital outlets
- Working with contractors who have historically served HTR and DAC customers and hired from those communities
- Providing materials on job opportunities to properties served, especially when serving HTR and DAC customers

Maintaining an Equity and Inclusion Task Force, which identifies opportunities for improvements and provides recommendations regarding policies and practices that ensure the PI is continuously evolving to support all team members