

**PACIFIC GAS AND ELECTRIC COMPANY  
2013-2014 ENERGY EFFICIENCY PORTFOLIO  
LOCAL PROGRAM IMPLEMENTATION PLAN  
THIRD PARTY  
INNOVATIVE DESIGNS FOR ENERGY EFFICIENCY  
APPROACHES (IDEEA365)  
  
ICF BRIDGES TO ENERGY SECTOR OPPORTUNITIES**

**PGE210134**

**JULY 2014**

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- 1) Sub-Program Name: IDEEA365 - ICF Bridges To Energy Sector Opportunities
- 2) Sub-Program ID number: PGE210134
- 3) Type of Sub-Program:  Core  Third Party  Partnership
- 4) Market sector or segment that this sub-program is designed to serve:
  - a.  Residential
    - i. Including Low Income?  Yes  No;
    - ii. Including Moderate Income?  Yes  No.
    - iii. Including or specifically Multifamily buildings  Yes  No
    - iv. Including or specifically Rental units?  Yes  No
  - b.  Commercial. NAIC codes: Not applicable for this non-resource program
  - c.  Industrial
  - d.  Agricultural
- 5) This sub-program is primarily non-resource
  - e. Non-resource program  Yes  No
  - f. Resource acquisition program  Yes  No
  - g. Market Transformation Program  Yes  No
- 6) Primary intervention strategies
  - h. Upstream  Yes  No
  - i. Midstream  Yes  No
  - j. Downstream  Yes  No
  - k. Direct Install  Yes  No
  - l. Non Resource  Yes  No
- 7) Projected Sub-program Total Resource Cost (TRC) and Program Administrator Cost (PAC):  
 Not applicable for this non-resource program.
- 8) 2013-2014 Sub-Program Budget

**Table 1. 2013-2014 Subprogram Budget**

Sub Program ID SubProgram Name	Total Administrative Cost	Total Marketing & Outreach	Total Direct Implementation (Customer Services)	Direct Implementation (Incentives & Rebates)	Total 2013-2014 Compliance Budget
PGE210134  ICF Bridges to Energy Sector Opportunities	\$38,083	\$19,041	\$323,704	--	\$380,828

9) Sub-Program Description, Objectives and Theory

a) **Sub-Program Description and Theory:** The overarching objectives of ICF's Bridges to Energy Sector Opportunities (BESO) program are to increase the supply and demand for energy efficiency services and the workers that provide them. This will be achieved by coordinating efforts that will result in increased: 1) implementation of energy efficiency projects in small- and medium-sized commercial businesses as a result of contractors' increased knowledge of financing options and enhanced sales skills; 2) demand for contractor services to undertake efficiency projects in small- and medium-sized commercial businesses; 3) demand from contractors for students (including low-income students) who are skilled in implementing energy efficiency projects; and 4) availability of skilled entry-level workers.

b) **Sub-Program Energy and Demand Objectives:** Not applicable for this non-resource program.

c) **Program Non-Energy Objectives:**

To accomplish the four objectives described above, the program will:

- Enhance current community college, DOE, and IOU training through the development of two webinars and two educational videos about financing and sales approaches that will increase contractors' ability to market to small- and medium-sized businesses;
- Increase contractor awareness and use of financing options and incentives to help transition the market; and
- Train and place 18 individuals from low-income populations with contractors that work with small- and medium-size businesses.

d) **Cost Effectiveness/Market Need:** The program will work with contractors to target small- and medium-sized commercial businesses to increase the number of energy efficiency projects undertaken at their facilities defined as those with less than 50,000 square feet of floor space or fewer than 50 workers on site. According to findings presented at the 2010 American Council for an Energy-Efficient Economy (ACEEE) Summer Study on Energy Efficiency in Buildings, these facilities are found to account for between 40 percent and 50 percent of total commercial energy consumption in California, but only three percent implement energy efficiency projects. Even when contractors are successful in selling energy efficiency projects to clients, many of them lack a skilled and versatile workforce to implement the projects.

e) **Measure Savings/ Work Papers:** Not applicable for this non-resource program.

10) Program Implementation Details

a) **Timelines:**

**Table 2: Milestones**

Milestone	Date
Final Video	July 15, 2014
Host Webinar 1	May 15, 2014
Host Webinar 2	October 15, 2014
Complete Training	October 2014
Confirm Placement	December 2014

b) **Geographic Scope:** The Bridges to Sector Opportunities Program is offered throughout PG&E’s service territory.

c) **Program Administration:**

**Table 3: Program Administration of Program Components**

Program Name	Program Component	Implemented by IOU Staff? (X = Yes)	Implemented by contractors to be selected by competitive bid process (if Yes then enter type of contractor/other market actor possibly used)	Implemented by contractors NOT selected by competitive bid process (list prime contractor and sub-contractor names)	Implemented by local government or other entity (X = Yes)
BESO	Contract execution	X			
	Webinar Development and Implementation		ICF		
	Review and approval of Webinar	X			
	Training and Recordkeeping		ICF		
	Curriculum Development		ICF		
	Review and approval of materials	X			
	Student Recruitment		ICF		
	Student Enrollment/Data Entry		ICF		
	Student Evaluation		ICF		

	Career Counseling and Placement Services		ICF		
	Video development		ICF		
	Review and approval of videos	X			

d) **Program Eligibility Requirements:**

i. Customers:

**Table 4. Customer Eligibility Requirements**

Customer Eligibility Requirement	PG&E
Non-residential customer	X
Small- to medium-sized commercial facilities with less than 50,000 square feet of floor space or fewer than 50 workers on site	X

ii. Contractors/Participants:

**Training Eligibility:** Eligibility requirements for enrollment in the BESO training program are:

- Must reside in PG&E service area
- Must meet the William M. Maguy School of Education program requirements listed below:
  - Be 18 years old or older
  - Have a high school diploma, general education development (GED) high school equivalency certificate, or take the Wonderlic placement test.
  - Meet the income eligibility requirements listed below. The household income limits are based on low-income guidelines established by the California Public Utilities Commission (CPUC) for the Energy Savings Assistance (ESA) Program.<sup>1</sup>

<sup>1</sup> Income guidelines are available on the CPUC’s website:  
<http://www.cpuc.ca.gov/PUC/energy/Low+Income/liee.htm>

**Table 5. Low income limits effective June 1, 2014, through May 31, 2015:**

Household Size	Income Eligibility Upper Limit*
1	\$31,460
2	\$31,460
3	\$39,580
4	\$47,700
5	\$55,820
6	\$63,940
7	\$72,060
8	\$80,180
Each Additional Person	\$8,120

*\* Upper Limit Calculation = 200% of Federal Poverty Guidelines*

**e) Program Partners:**

- i. **Manufacturer/Retailer/Distributor partners:** Not applicable for this program.
- ii. **Other key program partners:** ICF will work with the following partners in implementing the BESO program:
  - Proteus – Training and job placement assistance
  - Executive Institute of Energy Efficiency (EIEEE) – Contractor webcasts
  - Energy Commercialization, LLC – Education video production

**f) Measures and incentive levels:** Not applicable for this non-resource program.

**g) Additional Services:** The program intends to build awareness and availability of training for contractors through in-person courses and two short videos about financing opportunities (including BayREN’s Commercial PACE, and PG&E’s On-Bill Financing programs) and how to sell energy projects to small- and medium-sized commercial businesses, regardless of whether the business rents or owns the facility. The program will work with Energy Commercialization, LLC to develop two videos that will be distributed and highlighted in on-line webinars for contractors, as well as being made available on the Energy Workforce Sector Strategy website. The videos will build on the success of relatively new curriculum and courses that have addressed these topics but are customized for service providers of small- and medium-sized commercial businesses.

BESO will use a proven market strategy with contractors that provide, or are interested in providing, energy services to small- and medium-sized commercial businesses— understand, design, implement, and evaluate. In 2012, through PG&E’s Energy Efficiency Sector Strategy, the ICF team researched the issues related to the needs of the energy efficiency workforce. The BESO plans to use the information gathered from

this previous research to design and implement two hour-long webinars as well as two videos that provide new training information for both contractors and employees.

Furthermore, BESO will utilize its existing relationship with building owners and contractors (including connections of Energy Commercialization, LLC), community colleges, electrical contractors (through the International Brotherhood of Electrical Workers and the National Electrical Contractors Association), and business owners, through those that have identified energy efficiency through PG&E’s “My Energy” website, and electrical component supply houses to disseminate information about the program.

**h) Sub-Program Specific Marketing and Outreach:**

2014 Task	Apr	May	June	July	August	Sept	Oct	Nov	Dec
Kick-off Meeting	█								
Preliminary Outline of Content for first webinar	█								
Training #1	█	█	█						
Team Review of Content for Webinar/Video #1		█							
Outreach Assist for Webinar One		█							
Training #2			█	█	█	█			
Conduct Webinar Number One			█						
Webinar One Immediate Follow-Up			█						
Release of Video #1			█						
Training #3				█	█	█	█		
Preliminary Outline of Content for second webinar				█					
Webinar One Follow Up				█					
Team Review of Content					█	█			
Outreach Assist					█	█			
Conduct Webinar Number Two							█		
Webinar Two Immediate Follow Up							█		
Release of Video #2							█		
Webinar Two Follow-Up									█
Close-out Meeting or Report								█	█

**i) Sub-Program Specific Training:** As shown above, Proteus will provide three 10-week training courses for students. Topics include:

- Module 1:** Safety
- Module 2:** Basic Building Science
- Module 3:** Construction Math
- Module 4:** Introduction to Heating, Ventilation, Air Conditioning/(HVAC)
- Module 5:** Introduction to Tool, Equipment
- Module 6:** Commercial audits
- Module 7:** Off Site Field Experience

**Module 8:** Basic Electrical Skills

**Module 9:** Job Preparedness

- j) **Sub-Program Software and/or Additional Tools:** No software or tools are to be developed.

The Executive Institute of Energy Efficiency (EIEE) will reach out to each webinar participant following the event to ensure their issues were addressed and they have the resources to market energy efficiency projects to small- and medium-sized businesses. A second outreach survey will be conducted 60 days after webinar completion to determine how the materials from the trainings were utilized.

- k) **Sub-Program Quality Assurance Provisions:**

***Customer Satisfaction Surveys Methodology***

ICF will use a web-based survey driven by the Survey Gizmo4 platform, which will take advantage of time and cost savings associated with eliminating the printing and mailing of a survey instrument and having survey data returned in electronic format.” In addition, research shows email surveys are more effective in terms of response time, response quality, and data tracking.

Surveys will focus on customer satisfaction and impact of events. Each survey will be conducted immediate upon completion with one follow-up 90 days later to confirm impact of the training.

***Quality Assurance***

ICF will follow a quality assurance “audit” model utilizing best practices. To do this, ICF will perform desk and in-person random audits on all trainings, presentations, and support for programs conducted by sub-contractors and ICF. Written reports on all quality assurance activities will be disseminated.

- l) **Sub-program Delivery Method and Measure Installation/Marketing or Training:**

EIEE will lead two webinars in 2014 for contractors and outreach to assist in promoting the webinars. The webinars will cover two separate topics. The generic theme to be discussed is how to develop the business value proposition for energy efficiency activities and how to explain that business proposition to decision makers. The webinars will be crafted to help PG&E contractors who will be calling on subject matter experts (SMEs) within PG&E’s service territory. The webinars will be designed to provide knowledge transfer to assist these contractors in securing contracts with the SMEs to perform energy efficiency related activities with the SME’s facilities.

The webinars will be 60 minutes in length with an additional 30 minutes allocated for questions and answers (Q&A). All information technology activities related to the webinars will be conducted or managed by ICF. EIEE will develop the content for the webinars, plan the timing and dialogue during each webinar, and deliver the webinar

content. Marketing for the webinars will be managed by ICF. EIEE will assist with webinar outreach by contacting appropriate members in its network and making them aware of this program.

Full details of the webinar content will be co-developed by ICF and EIEE, but general features will include:

- SME facilities are assumed to be approximately 50,000 sq. ft. in size or less;
- Discussion of tools and resources that are available to contractors when they are developing their value proposition;
- Key marketing methods to employ;
- Case studies of efforts that were successful and unsuccessful; and,
- Content will be developed and delivered in the English Language.

m) **Sub-program Process Flow Chart:** Not applicable for this program.

n) **Cross-cutting Sub-program and Non-IOU Partner:** Not applicable for this program.

#### 11) Additional Sub-Program Information

a) **Advancing Strategic Plan Goals and Objectives:** The program will work with contractors to target small- and medium-sized commercial businesses to increase the number of energy efficiency projects undertaken at their facilities.

The Strategic Plan has a secondary goal, beyond the primary goal of energy savings, to engage disadvantaged communities in the workforce education and training (WE&T) opportunities created by energy efficiency investments. This program aims to support this secondary goal by preparing community members with historical barriers to employment for work in the small and medium businesses targeted through this effort. The program also aims to place these workers in employment opportunities, which is one of the principal goals of any WE&T investment.

#### b) **Integration**

i. **Integrated/coordinated Demand Side Management:** The BESO program will develop up to three 3-5 minute videos targeted toward small and medium-sized business. These videos will utilize different methods to convey to target business owners why invest in energy efficiency projects? How to get started? How to find the resources to make these investments possible. Top reasons why a company should get involved in energy efficiency will be the underlying theme of the videos. These include:

1. Save money on energy costs in the long term because costs are only going up
2. Enhance your brand image and secure your market share among the growing number of environmentally concerned consumers

3. It doesn't take a lot of effort, so start now

In developing the marketing videos, the BESO Team will identify messages that will resonate with the target audience, some including some quick tips to making businesses energy efficient

ii. **Integration across resource types** (energy, water, air quality, etc): Not applicable for this program.

c) **Leveraging of Resources:** Not applicable for this program.

d) **Trials/Pilots:** Not applicable for this program.

e) **Knowledge Transfer:** Not applicable for this program.

12) Market Transformation Information: Not applicable for this program.

13) Additional information as required by Commission decision or ruling or as needed: None.