

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

WAYPOINT CONNECT PROGRAM

PGE210137

JULY 2014

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- 1) Sub-Program Name: IDEEA365 - Waypoint Connect
- 2) Sub-Program ID number: PGE210137
- 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

NAICS Code	Description of Customer Segment
531110, 531120, 531130, 531190, 531210, 531311, 531312, 531320, 531390	Real Estate and Rental and Leasing
523920	Portfolio Management
921190	Public Property Management Services
493119, 4393120, 493130, 493190	Warehouse

- c. Industrial
- d. Agricultural
- 5) This sub-program is primarily a non-resource program
 - e. Non-resource program Yes No
 - f. Resource acquisition program Yes No
 - g. Market Transformation Program Yes No
- 6) Indicate the 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 Sub-Program 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
PGE210137 Waypoint Connect	\$158,678	\$19,041	\$583,936	-	\$761,656

9) Sub-Program Description, Objectives and Theory

a) **Sub-Program Description and Theory:**

A central feature of Waypoint’s Connect Program (or “Program”) is its innovative customer outreach strategy, deployed through a strategic partnership between Waypoint and the nation’s leading and largest public property management firms, CBRE, JLL, and Colliers. Through them, the Program will gain early insight into key intervention points in the retrofit cycle and help influence decision-makers at critical times in order to drive significantly greater adoption of existing PG&E program offerings. Together, Waypoint’s partners manage over 60 million square feet of office and retail space in PG&E’s service territory and provide additional advisory services to an even greater portfolio of square footage in the service territory.

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

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

- Analyze buildings/portfolios with attention to end customer (owner/tenant) characteristics
- Document improved customer experience through innovative engagement strategy
- Improve PG&E program performance through staff education and development
- Highlight program effectiveness by generating customer applications
- Overcome inherent market split incentive barriers
- Establish long term customer relationships through building efficiency plans that span multiple year periods
- Develop future pipeline of projects for capture by PG&E programs
- Develop additional market deployment channels by expanding number of property manager partner relationships over time

d) **Cost Effectiveness/Market Need:**

The California commercial real estate industry is a highly complex environment marked by multiple stakeholders with conflicting incentives, complex investment cycles and priorities, and multiple decision makers. The Program will actively address key market barriers that have led to low penetration of energy efficiency (EE) programs into office and retail space within PG&E’s territory. Barriers include: split incentive, lack of customer access, difficulty meeting commercial real estate project timing, and difficulty identifying project opportunities.

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

10) Program Implementation Details

a) **Timelines:**

Table 2. Milestones

Milestone	Date
Portfolio Benchmark Report 1 (55 buildings)	7/31/2014
Portfolio Benchmark Report 2 (55 buildings)	10/31/2014
Targeted Building Analysis Reports	12/15/2014
Incentive Applications received by PG&E	12/31/2014

b) **Geographic Scope:**

The Waypoint Connect Program is offered throughout PG&E’s service territory with a primary focus on higher density commercial buildings located in San Francisco, Oakland, and San Jose.

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)
Waypoint Connect	Program Planning and Management		Waypoint		
	Contract execution	X			

Review and approve program materials	X			
Service Territory Market Analysis		Waypoint		
Preparation of invoice packages and invoicing		Waypoint		
Program materials development		Waypoint		
Training and presentation to PG&E personnel		Waypoint		
Partner Program Strategy, Outreach and Implementation		Waypoint		
Reporting and Data Management		Waypoint		

d) Program Eligibility Requirements:

i. Customers:

Table 4: Customer Eligibility Requirements

Customer Eligibility Requirement (list of requirements)	PG&E
Non-residential customer	X
Commercial Office Building >50,000 Sq Ft	X

ii. Contractors/Participants: Not applicable for this program.

e) Program Partners:

i. Manufacturer/Retailer/Distributor partners: Not applicable for this program.

ii. Other key program partners: Potential key outreach partners include:

- Cushman & Wakefield
- CBRE
- Colliers

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

g) **Additional Services:**

Table 5: Additional Services

Additional Services that the Sub-Program Will Provide	To Which Market Actors	PG&E
Conduct Partner Portfolio Analysis	Property Management Firm Partners	X
Conduct Target Building Analysis	Property Management Firm Partners	X
Manage Customer Satisfaction	All	X

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

The Program will mitigate split incentives by actively addressing key market barriers that have led to a low penetration of energy efficiency programs into office and retail space within PG&E’s service territory. By understanding the lease structure, PG&E program offerings will be directed at the party who will benefit from the improvement (owners or tenants).

The Program will improve customer access by leveraging multiple staff throughout the property management chain (designated as Energy Conservation Managers) to engage owners on a daily basis. These individuals are trusted advisors for thousands of owners and tenants in PG&E’s service territory with preexisting relationships and access to key decision makers.

The Program will identify and utilize its own proprietary data analytics platform to identify and analyze performance of buildings with the highest EE opportunities. The Program will coordinate with assigned PG&E account representative to develop engagement strategy for each customer.

i) **Sub-Program Specific Training:**

Waypoint will attend training as requested by PG&E staff. Training will include, but is not limited to, webinars that provide training on the use of PG&E’s data reporting systems, invoicing procedures, regulatory and environmental activities and updates, codes and standards, energy efficiency and demand response products and other information pertinent to Program implementation.

j) Sub-Program Software and/or Additional Tools:

- i. List all eligible software or similar tools required for sub-program participation.
 MineralTM - Waypoint’s proprietary data analytics platform. The tool analyzes building energy use profiles, controlling for weathers, occupancy and other key market elements in order to gauge which buildings are optimal targets for participation.
- ii. Indicate if pre and/or post implementation audits will be required for the sub-program.
 Pre-implementation audit required ___ Yes X No
 Post-implementation audit required ___ Yes X No
- iii. As applicable, indicate levels at which such audits shall be rebated or funded, and to whom such rebates/funding will be provided (i.e. to customer or contractor).
 Not applicable for this non-resource program.

k) Sub-Program Quality Assurance Provisions:

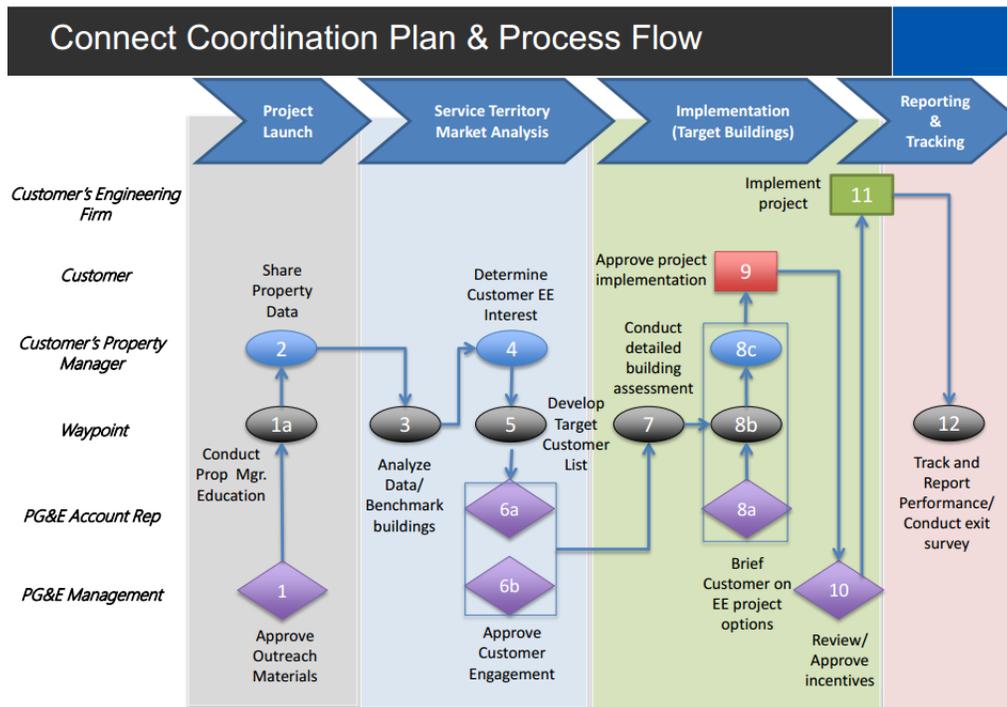
Table 6: Quality Assurance (QA) Provisions

QA Requirements	Activities	Measurement/ Tracking
Customer Satisfaction	<ul style="list-style-type: none"> • Scheduled check-ins • Prompt dispute resolution • Ensure availability for Q&A • In person visit with PG&E account rep 	Brief exit survey upon completion
Dispute Resolution	<ul style="list-style-type: none"> • Hotline available to customers for submitting complaints • Waypoint conducts initial screen • Waypoint to handle minor issues • Foundational issues will be referred to utility staff 	Waypoint logs and tracks complaint responses through Customer Relationship Management tool

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

As explained in the program description, a central feature of Waypoint’s Connect Program is its innovative customer outreach strategy, deployed through a strategic partnership between Waypoint and the nation’s leading and largest public property management firms, CBRE, JLL, and Colliers. Through them, the Program will gain early insight into key intervention points in the retrofit cycle and help influence decision-makers at critical times in order to drive significantly greater adoption of existing PG&E program offering. Waypoint will work closely with PG&E assigned account reps to identify high priority buildings and to develop strategies for conducting outreach to each targeted customer.

m) **Sub-program Process Flow Chart:**



n) **Cross-cutting Sub-program and Non-IOU Partner Coordination:** The Program will work with assigned PG&E Energy Solutions & Service (ES&S) account representatives to identify opportunities for customers to participate in other PG&E cross-cutting sub-programs.

Table 7: Cross-cutting Sub-program and Non-IOU Partner Coordination

Waypoint Connect Program		
Other IOU Sub-program Name	Coordination Mechanism	Expected Frequency
Nonresidential Deemed & Calculated	Individual or Group Meetings and Email	As needed, roughly monthly
Emerging Technologies	Individual or Group Meetings and Email	As needed, roughly quarterly
Third Party and Direct Install	Individual or Group Meetings and Email	As needed, roughly quarterly
Codes and Standards	Individual Calls or Meetings	As needed, roughly twice annually

11) Additional Sub-Program Information

- a) **Advancing Strategic Plan Goals and Objectives:** The Connect Program is a commercial real estate outreach and improvement program developed to address the missing information and deployment link between utilities and the commercial real estate industry. The Program provides property managers, building owners and tenants with easy and streamlined access to their energy performance information and available incentives to maximize their buildings' performance. The Program enables access to key energy efficiency decision-makers by working with the trusted agents and advisors for building owners and tenants. The Program gains early insight into key intervention points in the retrofit cycle and provides information and support to key decision-makers at critical times in order to drive significantly greater adoption of existing utility program offerings and deeper energy savings. The Program addresses the split-incentive barrier in multi-tenant buildings and incorporates a comprehensive approach to the energy conservations measures for buildings.

- b) **Integration**
 - i. **Integrated/coordinated Demand Side Management:** Program will work with assigned PG&E ES&S account representatives to identify opportunities for customers to take advantage of other DSM options.

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

- c) **Leveraging of Resources:** Program will utilize its own Mineral™ proprietary software tool to analyze building energy profiles and identify optimal targets for multi-measure retrofit opportunities. Through energy signal decomposition, Waypoint will determine which upgrades are most applicable to each building and establish peer-to-peer benchmarking. The assigned Waypoint Energy Conservation Manager will use this data to help engage key buildings withing their portfolios. The program will also use PG&E generated customer lists, including usages and dats, in order to identify buildings with highest potential.

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

- e) **Knowledge Transfer:** Program will work closely with assigned ES&S reps.

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

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