

Appendix G
Strategies & Sample Tactics
(Commercial, Industrial and Agricultural)

Appendix G:
Strategies & Sample Tactics (Commercial, Industrial and Agricultural)
(sorted by Intervention and New, Modified or Existing Strategy)

Intervention	Timing: S = 1-2 yrs M = 3-4 yrs L = 5+ yrs	Sector Focus: C = Commercial I = Industrial A = Agricultural	Customer Size Focus: S = Small M = Mid-size L = Large	N = New M = Modified E = Existing	Intervention Strategies Descriptions	Tactics (Samples)	Legislation, Policy, or Proceeding Support	Sector Overarching Strategies			
								Tailor Service by Customer Size	Increase Cost-Effectiveness	Innovations	Customer Education/Quality Contractor Workforce
Customer Incentives	S	C, I, A	L	E	Provide performance-based custom incentives to large, sophisticated customers	<ul style="list-style-type: none"> Target large, complex energy efficiency technologies and projects for Custom program Transition smaller, simpler energy efficient technologies and projects to pre-approved, cost-efficient deemed incentives 		X	X		
	S	C, I, A	S, M, L	E	Provide deemed incentives programs	Continue Deemed Incentive program (see Existing Programs section)			X		
	S	C, I, A	S, M, L	E	Provide incentives for integrated EE/DR HVAC offerings	Commercial HVAC Quality Maintenance incents the EE portion of smart thermostats and DR-enabling HVAC technology	DR				X
	S	C, I, A	S, M, L	E	Provide incentives to new construction market to prepare for future codes	<ul style="list-style-type: none"> Collaborate and provide incentives to new construction market for above-energy-code construction Coordinate with Codes & Standards program to integrate in-development codes into a new construction program 	CAEESP Comm Goal 1 ZNE Commercial Buildings		X		

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	S	C, I, A	S, M, L	E	Provide a Pump Test program	Continue Pump Test program (see Existing Programs section), but tied to new value proposition based on 2016 CPUC guidance			X		X
	S, M	C, I, A	M, L	M	Leverage meter-based best practices to lower implementation costs for calculating energy savings methodologies	Test different meter-based methodologies to replace calculated energy savings methodologies to achieve lower costs	AB 802	X	X	X	
	S	C, I, A	M, L	M	Focus sophisticated pre- and post-testing and customized energy solutions towards larger savings projects to align costs with benefits	Raise minimum incentive threshold for custom projects (waiver may be applied for grid-constrained regions)		X	X		
	S, M	C, I, A	S, M, L	M	Make energy efficiency more relevant to the customer by evaluating customer's actual savings instead of average technology savings	Set deemed incentive ahead of time, and calculate savings based on customer's actual usage			X		X
	M	C, I, A	S, M, L	M	Maintain cost-effectiveness of energy support services by sharing costs	Evaluate co-pay scenarios with customers			X		

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	S, M	C, I, A	S, M	M	Encourage property owners to make investments to replace HVAC systems, but reward both tenants and the property owners with portions of a performance-based incentive tied to energy savings persistence.	<ul style="list-style-type: none"> Host regular trainings to educate the property management communities about the benefits of energy efficiency improvement Talk to the right person – the energy decision maker Provide incentives to one or multiple parties involved 		X	X	X	X
	S, M	I, A	S, M, L	M	Expand inclusion of non-Lighting technologies into new construction programs	Evaluate Refrigeration cost-effective technologies for Industrial and Agricultural new construction			X		
	S, M	C, I, A	S, M	N	Provide incentives for leased energy efficient products to distributors and end-users	<ul style="list-style-type: none"> Research leased products' customer and distributor decision-making to identify appropriate program intervention Design program to push leased energy efficient products 		X	X	X	
	M, L	C, I, A	S, M, L	N	Provide incentives for new construction occupancy-related energy savings	Pilot performance-based incentive structure to realized vs. modeled savings (called "Savings by Operation" in PG&E because it includes occupancy operation of the building)			X	X	

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Delivery Channel	S, M, L	C	S	M	Accelerate incentive transition from direct install to more cost-efficient channels like mid/upstream or Codes & Standards	<ul style="list-style-type: none"> Evaluate technologies periodically for applicability for transitioning to the mid/upstream programs Evaluate market and technology solutions to identify where a direct install delivery channel is the ideal approach channel to influence customers 		X	X		
	S	C, I, A	S, M, L	M	Increase speed of program delivery by including deemed versions of new construction offerings	Transition system-approach new construction measures to deemed	CAEESP Comm Goal 1 ZNE Commercial Buildings		X	X	
Direct Install	S	C	S	E	Provide a Direct Install program for small business customers	Continue Direct Install Program (see Existing Programs section)		X	X		
	S	C	S	M	Target direct install delivery channel for new technologies (beyond Lighting)	Evaluate including non-Lighting end-uses like Pumps (Variable Speed Drive Pool Pumps)		X	X	X	
	M, L	C	S	M	Provide locational targeted offerings to support grid reliability	Redesign existing Commercial DI program for "rapid response" deployment in targeted regions, separate from existing Commercial DI	Locational			X	
Financing	S	C, I, A	S, M, L	E	Provide financing services for energy efficiency projects	Provide OBF and pilot OBR programs	AB 758 S5 Accessible and affordable financing mechanisms		X		

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	S, M	C, I, A	S, M, L	M	Leverage financing to cover all incentive and non-incentive program services provided to customers	Costs born by ratepayers for non-incentive services (e.g., pump tests, lab services, audits, etc.) that collectively result in energy savings (with or without incentives) could be paid for through financing. This could increase the availability of these services while saving ratepayer dollars.	AB 758 S5 Accessible and affordable financing mechanisms		X	X	
	S	C, I, A	S, M, L	M	Incorporate financing of to-code activity	Evaluate methods for incorporating to-code activity into OBF and OBR programs	AB 802		X	X	
	S, M	C, I, A	S, M	N	Provide financing options for distributors to stock and push energy efficient technologies	Evaluate OBF and OBR influence and effectiveness in distributor's purchasing and selling decisions, then create financing offering if found to be cost-effective	AB 758 S5 Accessible and affordable financing mechanisms	X	X	X	
Intelligent Outreach	S	C, I, A	S, M, L	E	Provide continuous RFP intake, review, and approval process for new Third Party programs	Continue IDEEA365 program (see Existing Programs section)				X	
	S	C, I, A	M, L	E	Provide trusted energy advisors to support large energy usage customers in whole building, complex energy efficient projects	Proactively outreach to large customers with dedicated personnel to identify and influence large energy efficiency projects		X	X		X

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	S	C, I, A	S, M	E	Provide tools to support on-site audits, focused on a narrower audience with potentially higher energy savings potential per customer, aligning ratepayer-funded cost of service with potential	Continue providing online and on-site energy advisory services to customers		X	X		X
	S	C, I, A	M, L	E	Provide tools to support self-service audits, focused on a broader audience with potentially smaller energy savings potential per customer, aligning ratepayer-funded cost of service with potential	Develop, support, and improve based on customer feedback to Benchmarking and EEAT	AB 758 S2.1 Easy-to-access data and analytics	X	X		X
	S, M	C, I, A	M, L	M	Pilot new data-based tools to identify energy savings opportunities	Identify untapped stranded potential energy savings opportunities through evaluation of capabilities of data-mining tools	AB 802	X	X	X	
	S, M	C	S	M	Expand direct install to new customer segments where beneficial	Expand to national accounts	AB 758 S4.2 Targeted marketing, education, and outreach	X	X		
	S	C, I, A	S, M	M	Adopt best practices for customer outreach across auditing programs	Social media delivery channel success in one energy audit service can be spread to other energy audit services					X

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	M	C, I, A	S, M, L	M	Evaluate audit tool improvements due to increased data access from AB 802	Review new capabilities in audit tools to achieve AB 802 evaluation requirements	AB 802					X
	S, M	C, I, A	S, M	M	Evaluate effectiveness of remote audits for lower cost audit and targeted marketing solutions	Continue pilots and evaluations on remote audit services to prove efficacy		X	X	X		
	S, M	C, I, A	S, M, L	M	Improve technologies and services supporting new construction	Evaluate new construction software for enabling additional EE measures into new construction programs	CAEESP Comm Goal 1 ZNE Commercial Buildings			X		X
	S, M	I, A	S, M	N	Use remote audits to identify high opportunity customers	Test remote audits for ability to evaluate unique Industrial and Agricultural customers		X	X	X		X
	M	C, I	S, M	N	Engage customers through behavioral offerings to drive energy efficiency adoption and conservation	Explore Non-residential Tenant Behavior Pilot (similar to 10-10-10 in Multifamily)		X		X		X
	S, M	C, I, A	S, M	N	Provide low-cost direct touchpoint for small/mid-size commercial customers' EE awareness	Small & mid-size customers to receive some basic level of services such as a "Customer Care Package" & customer outreach memo on an annual basis. The Commercial Customer Care Package may also include cost-effective LED bulbs, energy-efficient power strips, & other items.		X	X	X		X

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	S, M, L	C, I, A	S, M, L	N	Develop new programs to achieve stranded potential in customer's HVAC equipment	<ul style="list-style-type: none"> Pilot HOPPs combining existing HVAC Early Retirement, Quality Maintenance and Quality Installation into a single menu of HVAC offerings Ensure project quality with spot-checks for systems for initial assessment Spot checks mitigate risk of meter-based usage showing fluctuations due to changes in behavior 	AB 802		X	X	
	S, M	C, I, A	S, M	N	Leverage targeted outreach to identify high-opportunity customers for HVAC programs	Leverage customer targeting through looking at their metered usage for small/medium businesses (e.g., remote audits and disaggregation to identify high HVAC energy consumption)		X	X	X	
	S	A	S, M, L	N	Prepare EE measures and programs to respond to new Ag markets (e.g., legalized recreational cannabis)	<ul style="list-style-type: none"> Identify historical baseline for medical growing community, and/or research other state markets Monitor legalization & emerging crop & market growth 			X	X	X
Midstream / Upstream Incentives	S, M	C, I, A	S, M, L	E	Provide incentives to distributors and vendors for energy-efficient equipment	Influence customer/contractor purchase decisions in Replace-on-Burnout or Normal Replacement scenarios by offering distributor incentives for equipment		X	X		

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	S, M, L	C, I, A	S, M	E	Lower administration costs of programs by transitioning downstream deemed incentives to midstream interventions	Periodically evaluate downstream measures for whether distributor incentives can effectively influence customer adoption of efficient technologies			X		
	M	C, I, A	S, M, L	M	Provide locational targeted offerings for early retirement and upstream HVAC delivery channels to support grid reliability	Evaluate program design to provide simple, fast-track HVAC distributor and contractor-focused incentives in targeted regions	Locational		X	X	
	S, M	C, I, A	S, M	M	Provide cost-effective incentives to all energy saving technologies offered by distributors	Evaluate expanding incentives beyond current Lighting and HVAC technologies to Controls and Refrigeration as savings become claimable by PAs	AB 793	X	X	X	X
	M	C, I, A	S, M	M	Leverage distributor market positions and relationships with customers to influence early retirement	Develop cost-effective, easy-to-participate distributor/customer co-incentive early retirement program with compliant preponderance of evidence requirements		X	X	X	
	M	C	S	N	Provide incentives at the most cost-effective step in the technology supply chain	Evaluate effectiveness and costs of coupons for EE technology sales for customers to distributors in a midstream program vs. the more costly door-to-door direct install delivery channel		X	X	X	X

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	M, L	C, I, A	S, M	N	Ensure lowest cost / highest effect for customer incentives by using market forces to set incentive levels	Pilot reverse-auction mechanism for high-volume technologies and projects		X	X	X	
Partnering	S	C	S	E	Reduce direct install administration costs through market forces	Launch competitive solicitations to reduce costs			X		
	S, M, L	C, I, A	S, M	E	Ensure lowest cost / highest effect for customer incentives by keeping up to date on changing technology costs	Use distributor partnerships to maintain up-to-date technology costs to maintain appropriate incentive levels and cost-effectiveness			X		
	S, M, L	C, I, A	S, M, L	M	Ensure lowest cost / highest effect for customer incentives by keeping up to date on changing technology costs	Use customer authorized agent partnerships to maintain up-to-date technology costs to maintain appropriate incentive levels and cost-effectiveness			X		
	S, M, L	C, I, A	S, M, L	M	Leverage industry experts for understanding HVAC O&M-based energy savings for customers and program administrators	Participate and apply information from Western HVAC Performance Alliance (WHPA) working groups around evaluating energy savings from Fault Detection & Diagnostic equipment and other HVAC equipment	CAEESP HVAC Goal 4 New HVAC Technologies and Systems Diagnostics		X		X
	S	C, I, A	S, M, L	M	Expand outreach to the new construction market	Improve program design and market adoption of new construction offerings by partnering with relevant trade associations	CAEESP Comm Goal 1 ZNE Commercial Buildings		X		X
Quality	S, M, L	C, I, A	S, M, L	E	Push market towards quality installation and	Provide incentives and training to customers and contractors for	CAEESP HVAC Goal 2				X

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Assurance					maintenance of HVAC equipment	quality maintenance and installation of HVAC equipment	Quality HVAC Installation & Maintenance				
	S, M	C, I, A	S, M	M	Expand quality maintenance to small/medium customers	Evaluate lessons learned from large customer participation in quality maintenance incentive and training programs to expand cost-effectively to small/medium customers	CAEESP HVAC Goal 2 Quality HVAC Installation and Maintenance	X	X		X
Single Point of Contact	M, L	C	S, M, L	N	Target specific Commercial businesses to achieve ZNE retrofit goals	<ul style="list-style-type: none"> Develop whitepaper on how to target and provide services/incentives to achieve ZNE businesses. Pilot would explore how to stitch together all funding sources (EE, DR, IDSM, etc.) under this EE program. 	IDER; CAEESP Comm Goal 1 ZNE			X	
	M, L	C, I, A	S, M, L	N	Develop fast-acting IDSM program for targeting businesses in targeted regions for grid reliability solutions	When SCE is experiencing a grid congestion situation (i.e., Aliso Canyon, SONGS-affected area, other identified transmission and distribution congested locations, etc.), this pilot will supply a rapid response set of EE, DR, Solar, & IDSM responses to help alleviate grid constraints.	Locational		X	X	
	S	C, I, A	S, M, L	M	Cross-promote additional EE measures when working with the customer-critical EE products and services	Establish activities like the pump test as the influence point for additional measures installation					X

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Single Point of Contact	S	C, I, A	S, M, L	M	PA-run customer support services should link to 3P programs	Assure linkage for PA-run pump test preliminary findings to 3P administered programs			X	X	
	S, M, L	C, I, A	S, M, L	M	Integrate non-EE energy solution options for customer's HVAC equipment	Continuously evaluate integrated DR solutions into efficient HVAC equipment such as DR-enabled Thermostats (currently offering DR-enabling Automatic Digital Economizer Controls [ADEC])	DR			X	X
	L	C, I, A	S, M, L	M	Integrate new construction market with Distributed Energy Resources	Evaluate and claim benefits of EE's interactive consequence to reduce Distributed Generation's (DG) size requirements	CAEESP Comm Goal 1 ZNE Commercial Buildings; IDER/IRP		X		X
	S, M	C, I, A	S, M, L	M	Integrate non-EE energy solution options for customer pumping equipment	Evaluate including DR-capability into pumps and pump tests (such as Base Interruptible Program [BIP])	DR			X	
Strategic Energy Management (SEM)	S	C, I, A	S, M, L	M	Discuss policy changes to enable cost-effective approved savings methodology (meter-based) for CEI, claim savings for impacts of nonresource activities such as audits, and allow SEM beyond Commercial into Industrial and Ag energy usage, as appropriate	Coordinate with CPUC/Energy Division to align state policies with SEM goals	AB 802	X	X	X	

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	M, L	A	S, M, L	M	Based on lessons learned on high potential Comm and Ind SEM programs, adapt CEI program to Ag sector	Develop a cohort, web-based, or other "SEM lite" options that can be integrated into Ag customer's business models		X	X	X	X
	M	C, I	S, M	M	Based on success of years 1-2, plus AB 793 implementation, spread the SEM model or variations further to Commercial in years 3-4.	<ul style="list-style-type: none"> Develop a cohort, web-based, or other "SEM lite" options that are lower cost Evaluate method to claim AB 793 technology energy savings through CEI M&V methodology 	AB 793; AB 758 S2.2 Strategic energy plans	X	X	X	X
	L	C, I, A	L	N	Solution provider for larger customer's energy management needs and utilities' grid reliability and cost-effectiveness requirements beyond EE	Integrate EE into IDER offerings	IDER/IRP	X	X	X	X
	S	C, I	L	N	Implement resource Strategic Energy Management for large business customers (Comm and all Ind)	PAs are developing methodology for SEM savings claims including data collection protocols and guidebooks for implementation		X	X	X	X
	M, L	C, I, A	S, M	N	Train SEM implementer workforce	WE&T pilots for driving engagement with SEM contractors and customers to scale SEM assuming it is cost-effective	AB 758 S2.2 Strategic energy plans	X	X	X	X

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Sustainable Offerings	S, M	C, I, A	S, M, L	M	Reduce administration costs of third party programs	<ul style="list-style-type: none"> Consolidate similar third party program contracts by sector (e.g., consolidate all Commercial Third Party programs into one contract) Include Diverse Business Enterprise (DBE) contracting requirements to maintain current levels of DBE market support 			X		
	S	C, I, A	S, M, L	M	Reduce overhead costs by applying best practices for energy support services contracts	<ul style="list-style-type: none"> Merge contracts Use fixed-costs contracts 			X		
	S, M	C, I, A	S, M, L	M	Ensure sustainability of pump testing program by transitioning existing offering to be more cost-effective	<ul style="list-style-type: none"> Validate savings impacts and customer benefits Evaluate customer co-pay for increasing program cost-effectiveness Consider applicability for pump tests as an AB 802 resource measure Evaluate whether pump tests affect customer behavior and reducing energy usage, and consider revamping into a non-incentive resource offering 	AB 802		X		
	M, L	C, I, A	S, M, L	N	Increase non-incentive services to the customer by showing influence of cost-effective energy efficiency savings	<ul style="list-style-type: none"> Incentives to the customer may not just be cash to the customer, but paid-for services (e.g., pump tests, workforce education, lab services, etc.) that can be connected to energy savings 		X	X	X	X

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						<ul style="list-style-type: none"> M&V research validates that services, not just incentives, can influence EE activity 					
	S, M, L	C, I, A	S	N	Energy Management Systems upgrades to be evaluated for resource benefits to enable greater incentives and ratepayer cost-effectiveness	<ul style="list-style-type: none"> Work with customers to upgrade EMS Work with EMS developers for software upgrades (that could also count for resource benefits) 	AB 793	X	X	X	X