



# CLEAResult<sup>®</sup>

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Local Commercial SEM Program –  
Implementation Plan Webinar

6/14/2024



## SAFETY MOMENT – Summer Safety

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### Grill Safety Tips:

Grills and smokers have a great potential for danger.

- Never leave a lit or hot grill unattended.
- Keep the grill at least two feet away from flammable objects such as house siding, deck walls, low hanging branches, outdoor equipment, or toys.
- Designate a “grill master” to control flames and to keep children and pets away.
- Keep a fire extinguisher handy and be prepared to cut off fuel lines if using propane. Read the instructions in advance so you can act quickly in the event of an emergency.

### Water Safety Tips:

- Designate a “pool-watcher” when children are swimming. When many people gather, adults may think someone else is watching but having one person that’s in charge can increase safety.
- Know in advance which children can swim and those that cannot but remember no one is “drown-proof.”
- Always have kids wear appropriately fitted lifejackets when boating and have one available for each adult.





# Today's Agenda

1. Safety Moment
2. Program Overview
3. Program Delivery
4. Strategic Energy Management (SEM)
5. Program Design
6. Program Metrics
7. Program Measures
8. Customer Eligibility
9. Questions?

## Speaker

Patrick Sippel  
Senior SEM  
Program Manager

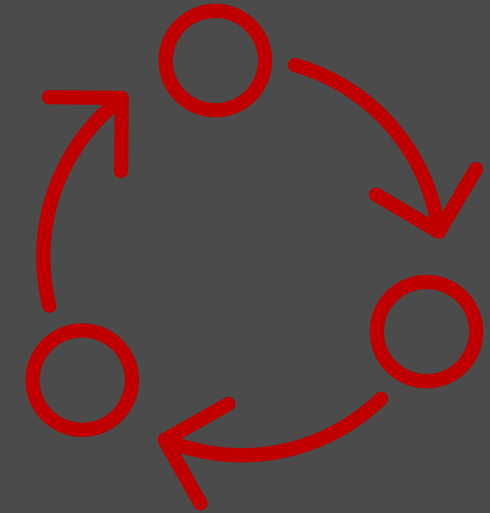


## House Keeping:

If you have a question during the presentation, you may post it in the chat or wait until the end for the Questions section and raise your hand. Thank you!



# Program Overview





# Program Overview

- ✓ CLEARResult's Local Commercial Strategic Energy Management (SEM) Program will provide energy efficiency services, technical assistance, and incentives to the Commercial sector, focused on **behavioral, retro-commissioning, and maintenance and operational (BRO) measures, within Southern California Edison (SCE) service territory.**
- ✓ The SEM program will provide a **comprehensive approach** based on individual customer needs and opportunities through the SEM pathway, **which involves identification of facility wide energy saving opportunities and development of a dynamic baseline model to determine energy savings from all program activity at the facility. This includes the ability to incentivize capital projects through the custom or deemed calculated retrofit process, completed through the SEM measure pathway.**
- ✓ The program will act as a **single point of contact** for these customer segments connecting and leveraging other resources and funding sources including On-Bill Financing (OBF) for capital projects.

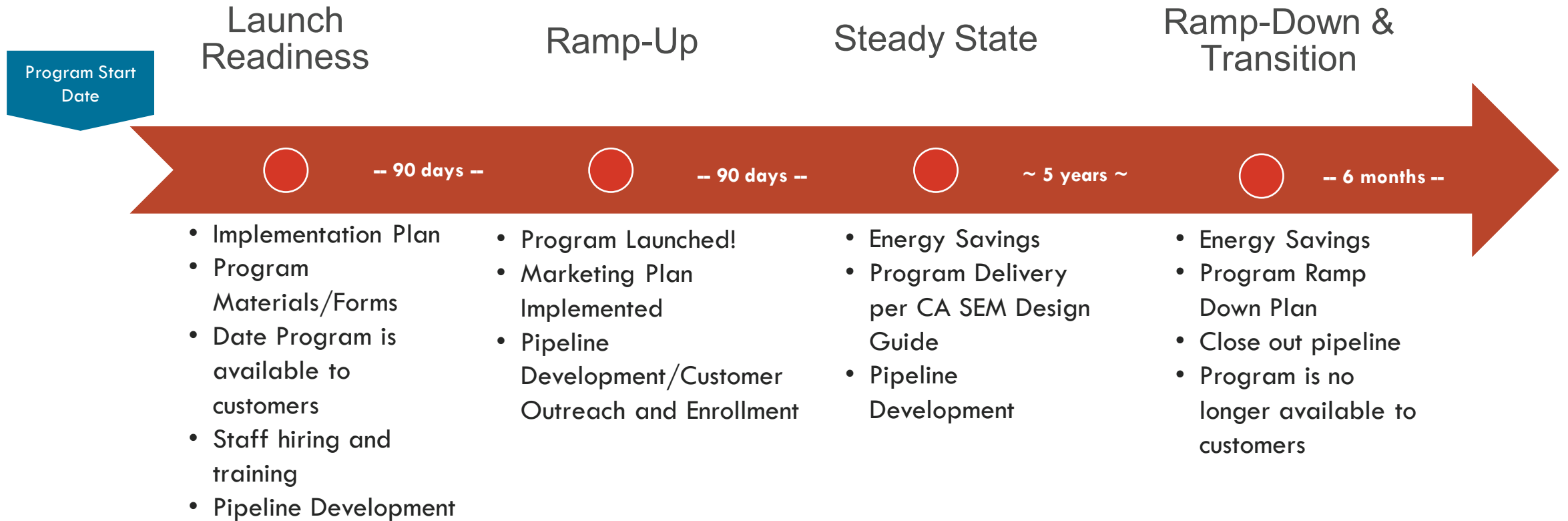


# Savings and Cost Effectiveness Goals

Gross Impacts Table	2024	2025	2026	2027	2028	2029	Total
<b>Total System Benefit (\$)</b>	5,403,246	8,225,371	8,420,152	8,136,612	7,767,192	7,332,980	<b>45,285,553</b>
<b>Gross Energy Savings (kWh)</b>	6,284,250	9,276,750	9,576,000	9,576,000	9,576,000	9,576,000	<b>53,865,000</b>
<b>Gross Gas Savings (therms)</b>	369,360	615,600	656,640	656,640	656,640	656,640	<b>3,611,520</b>

Cost-Effectiveness	2024	2025	2026	2027	2028	2029	Overall Portfolio
<b>TRC</b>	1.24	1.20	1.23	1.28	1.31	1.34	<b>1.27</b>
<b>PAC</b>	1.65	1.80	1.92	1.99	2.05	2.08	<b>2.37</b>

# CR Timeline & Milestones





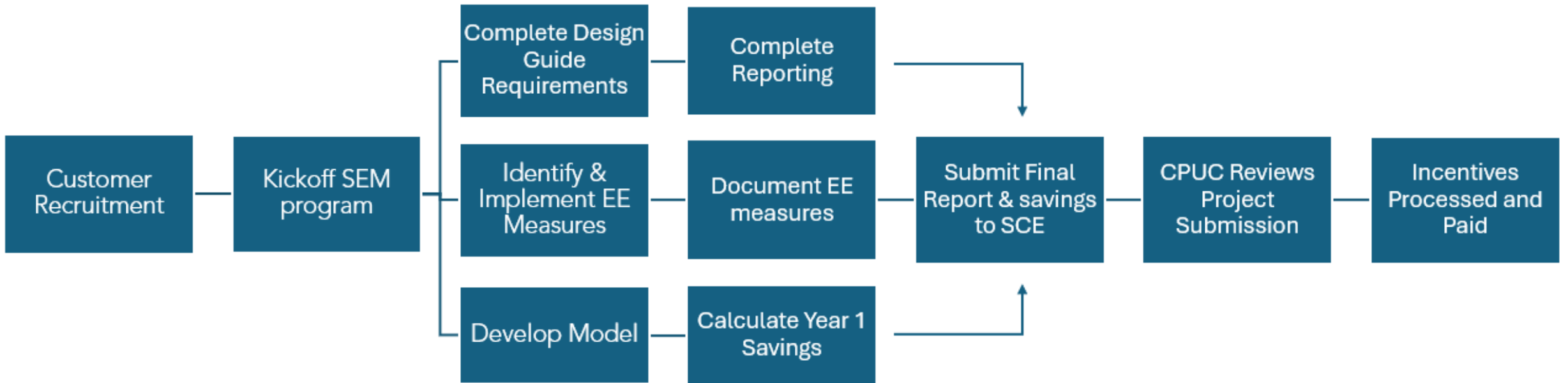
# Program Delivery





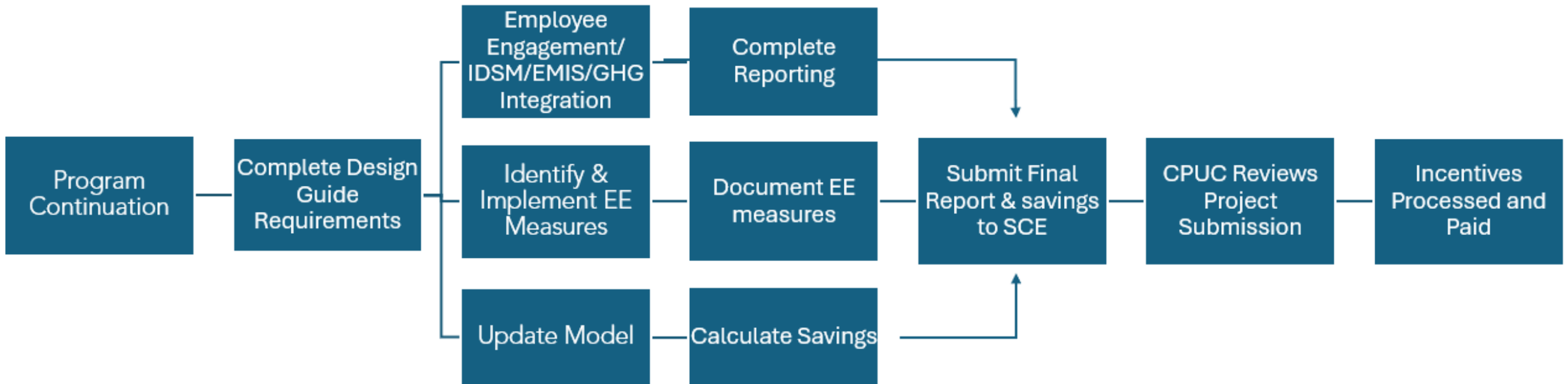
# CR Customer Journey

Year 1



# CR Customer Journey

Years 2-6





# Customer Outreach

- ✓ **Lead generation** will come from a variety of sources including:
  - Utility customer data
  - Direct to customer marketing
  - Program Outreach Managers
  - Manufacturers, distributors, and vendors serving these segments
  - Industry and trade organizations
- ✓ Direct customer outreach will be the key tactic to drive customer participation in the program. Outreach Managers and the SEM program team will coordinate to educate customers and recruit them into the program.
- ✓ The program will focus on **customer satisfaction** as repeat participation and word-of-mouth are key components to ongoing success of engaging and signing new customers.

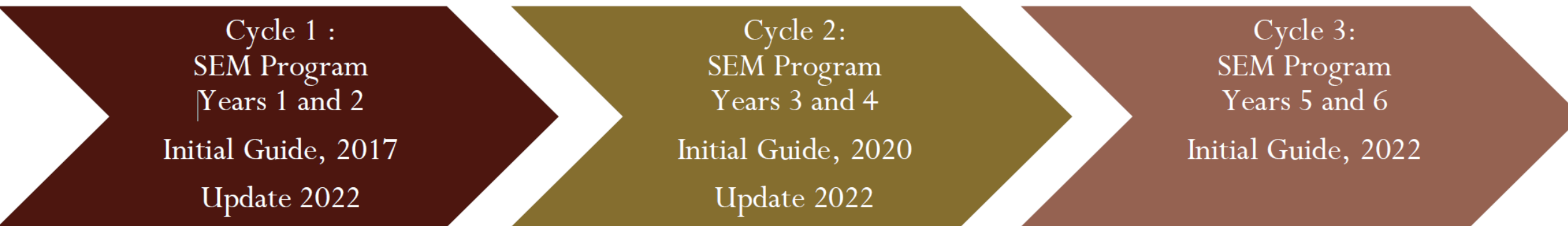
# Customer Services and Support

- ✓ **Simple Program Processes:** The SEM program team will focus on face-to-face and virtual meetings, cohort-type training workshops, facility energy analysis, and Measurement and Evaluation (M&V) activities to create and sustain relationships and drive program success.
- ✓ **Creating Energy Experts:** We educate participants to better understand their energy usage, recognize energy improvement opportunities, and envision a long-term energy roadmap.
- ✓ **Flexible Program Structure:** We deliver a targeted, high-touch customer experience and subsequent increase in savings through our structure that helps guides each participant towards the path to savings that best fits their operational and financial needs.
- ✓ **Diverse Pathways:** We will reach diverse communities and organizations with high levels of service and rapid realization of low/no-cost energy savings. Accomplish through webinars and virtual peer-to-peer learning events to reach remote locations and help them feel connected. This model encourages a collective increase of enthusiasm for energy efficiency and a recognition that gains in efficiency are available to all customers, regardless of location.

# Strategic Energy Management



# History of Strategic Energy Management in California



Cycle 1 :  
SEM Program  
Years 1 and 2  
Initial Guide, 2017  
Update 2022

Cycle 2:  
SEM Program  
Years 3 and 4  
Initial Guide, 2020  
Update 2022

Cycle 3:  
SEM Program  
Years 5 and 6  
Initial Guide, 2022

[California SEM Design Guide For: Cycle 1, 2, and 3](#)

# CR STRATEGIC ENERGY MANAGEMENT (SEM)



HOLISTIC



CONTINUOUS  
IMPROVEMENT



LOW/NO COST &  
BEHAVIORAL

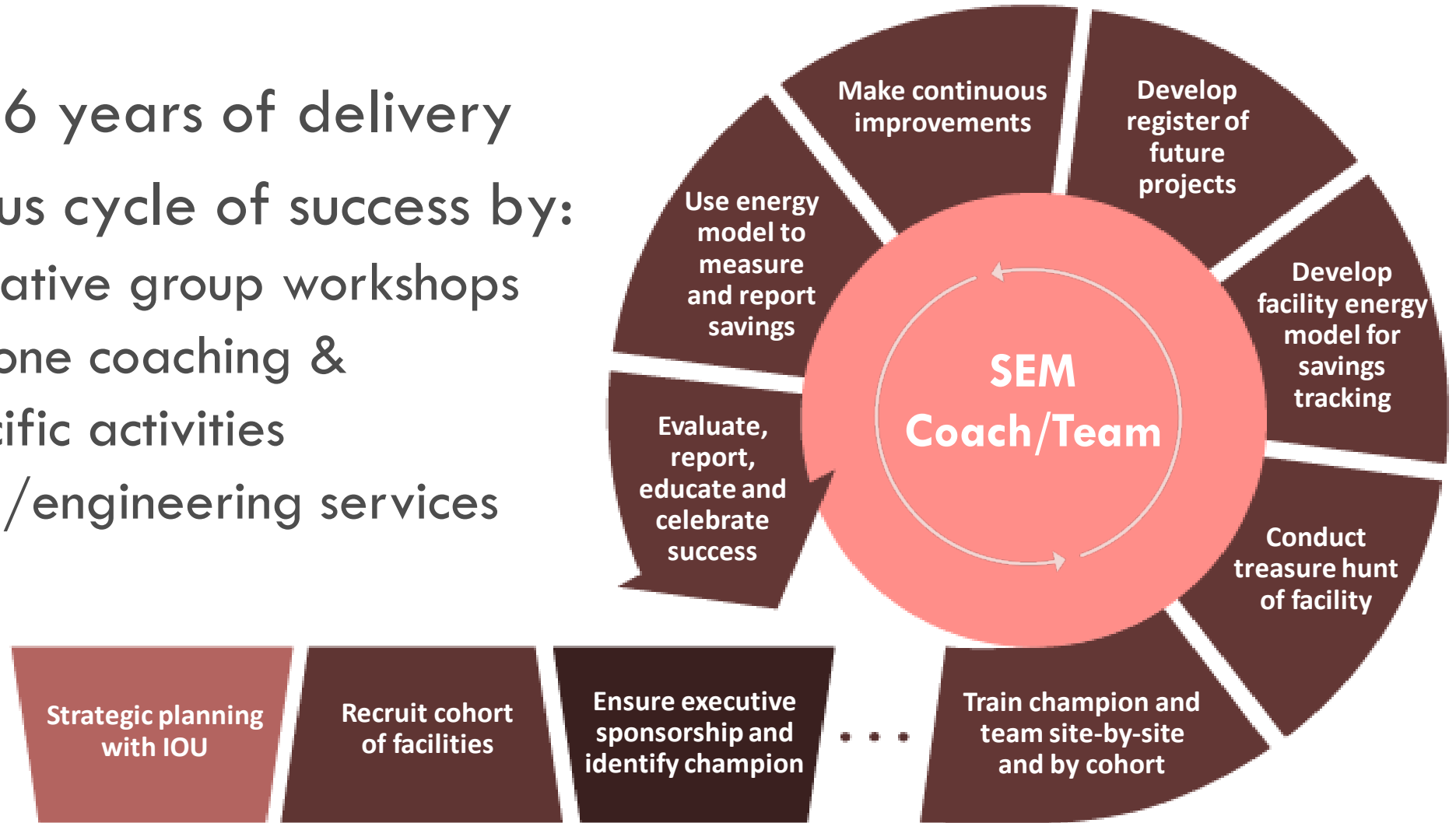


STAKEHOLDER  
ENGAGEMENT



# How does SEM work?

- ✓ 3 Cycles - 6 years of delivery
- ✓ A continuous cycle of success by:
  - Collaborative group workshops
  - One-on-one coaching & site-specific activities
  - Technical/engineering services

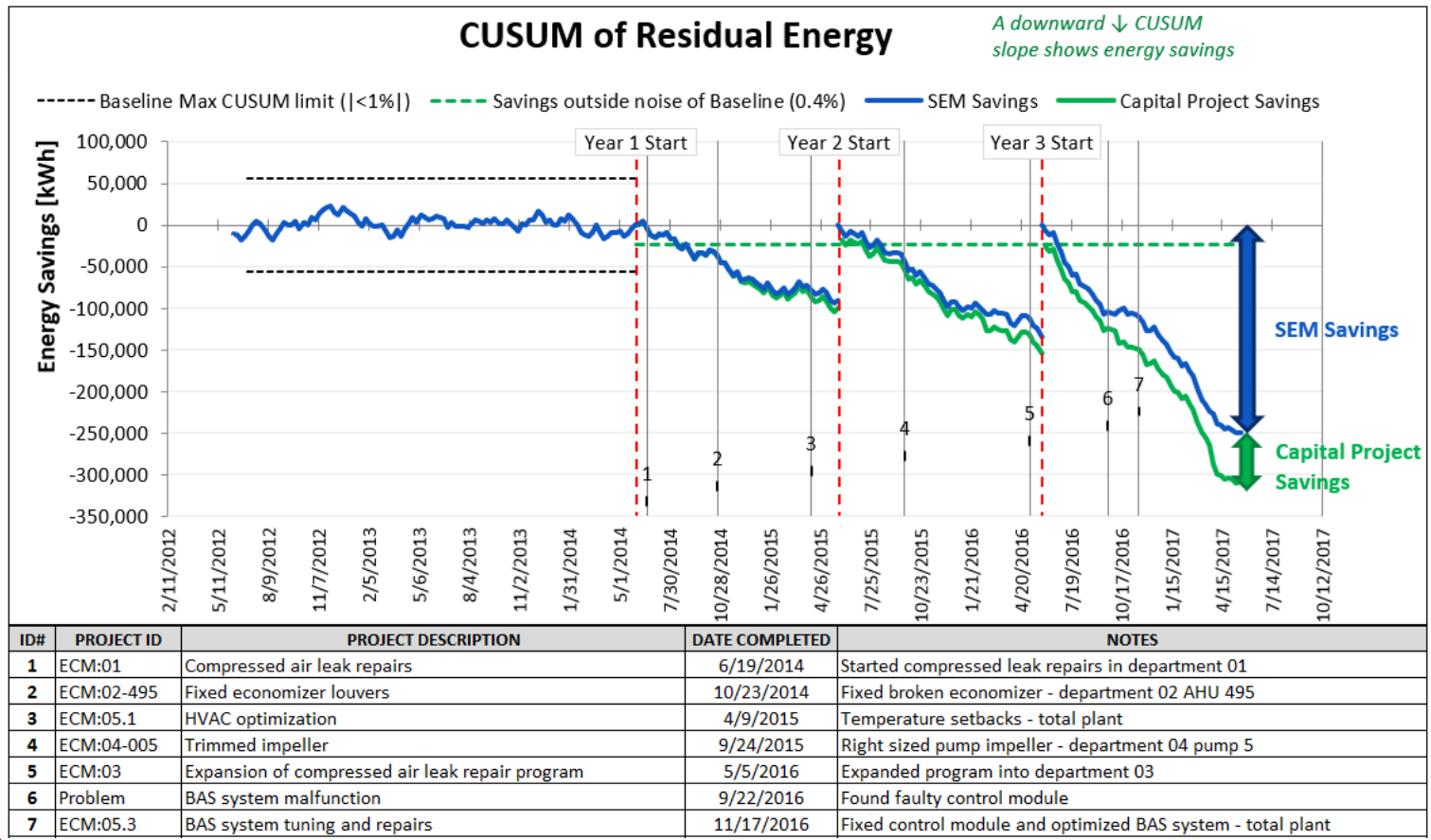




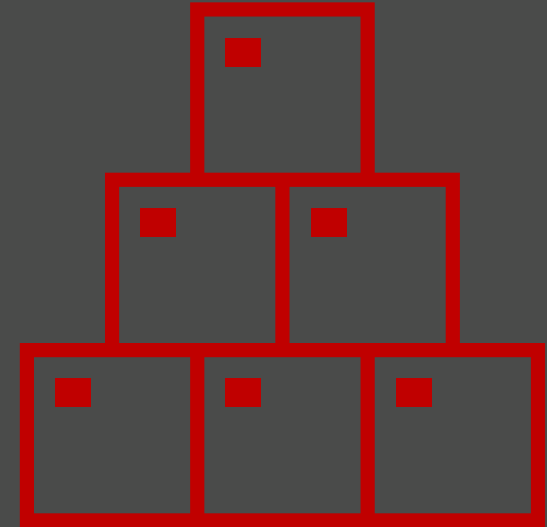


## California SEM M&V Guide

- ✓ Latest version of the guide will be followed (currently 3.02)
- ✓ CPUC has specified in decision and other documentation that M&V Guide provides the basis by which energy savings shall be determined for CA SEM
- ✓ Designed to work in coordination with CA SEM Design Guide
- ✓ California SEM M&V Guide



# Program Design



# CR Program Design

The program is designed to meet the needs of the local commercial sector with market barriers being addressed through the following strategies and tactics:

## Provide Combined Technical Assistance, Tools, and Expertise

- ✓ Virtual Assessment
- ✓ On-site Treasure Hunt
- ✓ Engineering support
- ✓ Cohort workshops
- ✓ Highly refined tools
- ✓ 1:1 SEM coaching

## Security & Access Restrictions

- ✓ Robust IT security policies
- ✓ Data Security

## Financial and Procurement Support

- ✓ Integration of On-Bill Financing (OBF)
- ✓ Alternative funds sourcing
- ✓ Direct incentives

## Commitment to SEM

- ✓ Ensure participants understand what the program entails
- ✓ Peer interactions through cohort workshops
- ✓ Have 2+ personnel each participate in each workshop

# CR Benefits of Participation - Innovation

## Strategic Energy Management

- Holistic, whole facility approach
- Expert energy coaching and technical services
- Goal of 3-5% annual reduction through BRO measures

## Hybrid Virtual/In-Person Delivery

- Able to conduct the program virtually and face-to-face

## Total System Benefit (TSB)

- A metric implemented to evaluate and maximize cost effectiveness
- Takes into account all sources of energy i.e. electricity, natural gas, etc.

## Greenhouse Gas (GHG)

- Integration of GHG reduction strategies into program
- Offer participants access to CLEARResult's ATLAS Carbon™ platform



# Program Metrics





# Program Metrics

- ✓ Total System Benefit
- ✓ Gross and Net Savings Goal Attainment –kWh, kW and therms
  - All Participants
  - Disadvantaged Communities (DAC)
  - Hard-to-Reach (HTR) Markets
- ✓ Project Pipeline Target Savings – kWh, kW and therms
- ✓ GHG Reduction Attainment
- ✓ Schedule Adherence – Projects committed vs installed vs forecasted
- ✓ Cost per unit Saved - Levelized cost of energy efficiency per kWh, kW, and therms
- ✓ Customer Satisfaction Rating
- ✓ Safety Rating
- ✓ HTR and DAC total participants

# Program Measures



## SEM

- ✓ Core path is SEM; participants in program must participate in the SEM component
- ✓ Enrolled participants can take advantage of other deemed and customer measures, on a case by case basis



# Customer Eligibility



## Customer Eligibility

- ✓ Must take or receive electricity services from within SCE's service territory and pay the Public Purpose Program (PPP) surcharge
- ✓ Eligible customers conduct business under NAICS Codes which broadly cover sites that are wholesalers, retail, transportation and warehousing, media and information, office buildings, healthcare, arts, entertainment, accommodations and food services



**Program Contact Info:**

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