



resource
innovations

Small Business Energy Advantage Program

Date: May 31, 2024

Agenda

1. Program Overview
2. Customers: Eligibility, Targeting & Strategies
3. Timeline
4. Q&A



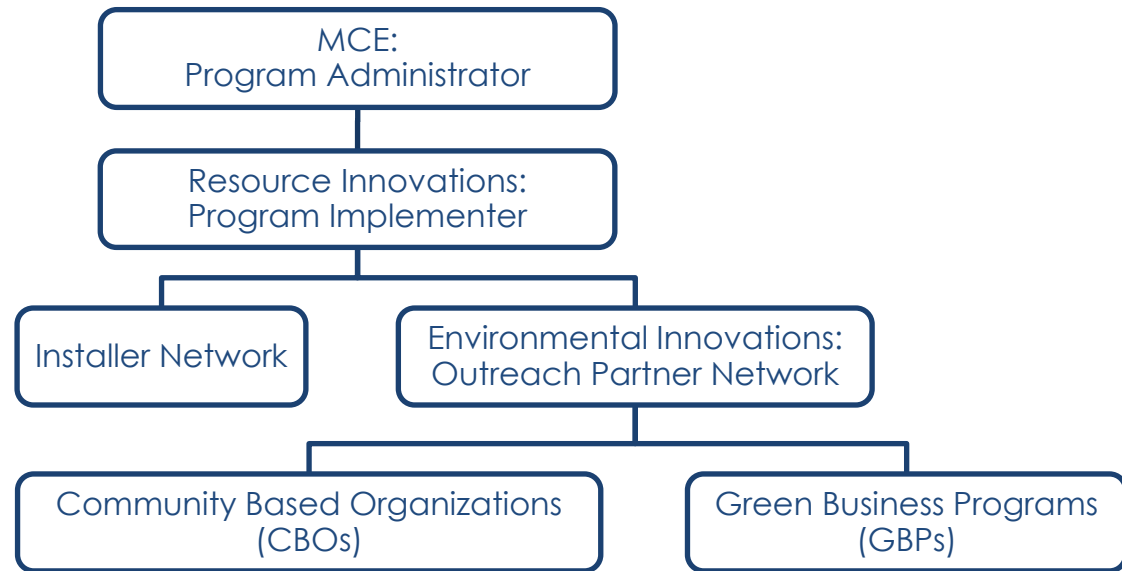
RISING
LOAFER

CAFE & BAKERY

Program Overview



Program Overview: Organization Chart



Program Overview: Summary



The MCE Small Business Energy Advantage Program, implemented by Resource Innovations, provides small businesses located in underserved communities with access to bill reducing energy efficiency upgrades that also offer health, comfort, and safety benefits.



Program Overview: Program Features

Small Business Focused Services and Measures

Simple to participate

Single point of contact for program engagement

Relevant information and educational support

Relevant no-cost and reduced-cost measures

Custom software configured to support unique small business needs

Small Business Focused Team

Green Business Partners provides a path to improved sustainability

Community Based Organizations (CBOs) support local, community-oriented outreach

Local Installer Network ready to serve small customers comprehensively and efficiently

Equity Status Enables Prioritization Benefits

Bill cost reduction

Non-Energy Benefits (NEBs)

Meaningful customer service

Steppingstones towards long-term engagement



Program Overview: Description



Goals: Provide bill savings and energy education to Environmental & Social Justice (ESJ) Communities and Hard-to-Reach (HTR) businesses.



Challenges: Addresses lack of resources due to traditional Energy Efficiency (EE) program designs.



Partnerships: Leverages local Outreach Partner Network



Engagement: Reaches businesses in their language and offers no-cost and reduced-cost improvements.



Impact: Reduces energy bills and enhances health, safety, and comfort.



Equity Metric: Measures success by improving small business resiliency in ESJ Communities.

Program Overview: Objectives

1. Equitable Access
2. Meaningful Bill Savings
3. Local Outreach
4. Resilience and Community Impact
5. Workforce Development and Training



Program Overview: Participant Pathways

Types of Participation:

Market Support Participant (MSP)	Resource Acquisition Participant (RAP)
Receives energy-saving education, facility assessments, and information on complimentary programs	Same as MSP
Connected with a qualified Program Installer to review potential energy efficiency upgrades	Same as MSP
May choose which no-cost or reduced-cost measures to install	Same as MSP, and elects to install energy saving project offered



*The Program's goal is to provide 1,200 customers with MSP services and 900 customers with RAP services over the three program years.

Program Overview: Customer Services



Services Provided:

- Single point of contact
- Energy education
- Facility assessment
- Incentives
- Financing opportunities



Program Overview: Barriers and Strategies

Equity Market Barrier	Impacts	Program Strategies
Costly Outreach and Delivery to Underserved Communities	Limits access to resources for small businesses, disproportionately affecting DACs and low-income neighborhoods	<ul style="list-style-type: none"> • Focus outreach on underserved communities. • Enlist local CBOs and GBPs in the Outreach Network. • Partner with city staff and CBOs for door-to-door campaigns
Lack of Trust in Institutions	Skepticism towards government or utility assistance, leading to program rejection	<ul style="list-style-type: none"> • Use local agencies within communities to build trust
Language Barriers	Non-English-speaking business owners may not understand or access program offerings	<ul style="list-style-type: none"> • Include CBOs offering multilingual assistance • Provide marketing materials and web content in multiple languages
Time Constraints	Overworked business owners neglect energy-saving upgrades due to time costs	<ul style="list-style-type: none"> • Utilize the iEnergy tool to streamline enrollment, assessment, and upgrade selection • Schedule installations around the customer's timeline
Lack of Capital or Credit	High costs prevent participation; limited credit options lead to neglecting costlier improvements	<ul style="list-style-type: none"> • Offer free site assessments. • Provide no-cost and reduced-cost measures. • Offer financing options like On-bill financing and Go Green Financing



Program Overview: Incentives



Direct Install (DI) measures:

- Incentive amount matches installation cost exactly
- No-cost to customers
- Include easier to install measures

Point of Sale (POS) measures:

- Incentive amount is fixed independent of installation cost
- Reduced-cost for customers
- Include more complicated upgrades

Program Overview: Measures



Tech Type	Direct Install (no-cost)	Point-of-Sale (reduced-cost)
Envelope		Window Film
HVAC	Smart Thermostats	Heat Pump Replacing a Gas Furnace
	Pipe Insulation	Heat Pump Replacing a Heat Pump
		Variable Frequency Drive Motors
IAQ	Room air purifiers	
Lighting	LED Lamps: Pin and Screw-base	LED Exterior Area Lighting
	LED Lamps: Type A Tubes	LED Exterior Wall Mounted Lighting
	LED Retrofit Kit: Interior General Downlight	LED Lamps: Type B Tubes
	LED Retrofit Kit: Interior General Troffer 1x4, 2x2, 2x4	LED Lamps: Type C Tubes 2, 3, & 4-lamp Fixture
	Occupancy Sensors	LED New Fixture: Interior General Linear Ambient 2, 4, 8 ft
		LED New Fixture: Interior General Troffer 1x4, 2x2, 2x4
		LED New Fixture: Interior High or Low Bay Lighting
		LED Retrofit Kit: Interior General Linear Ambient 2, 4, 8 ft
Plug Load	Smart Connected Power Strip	
	Vending Machine Smart Outlets / Timers	
Refrigeration	Auto Door Closer - Freezer	Auto Door Closer - Cooler
	Door Gaskets (Glass & Solid Doors)	ECM Retrofit for Walk-in Cooler or Freezer
Water	Faucet Aerators	Electric to Electric Water Heater
	Pre-Rinse Spray Valves	

Non-Energy Benefits (NEBs)

- Bill savings
- Healthier environments
- Occupant comfort
- Safety improvements

Examples:

- Air purifiers
- Interior lighting
- Exterior lighting

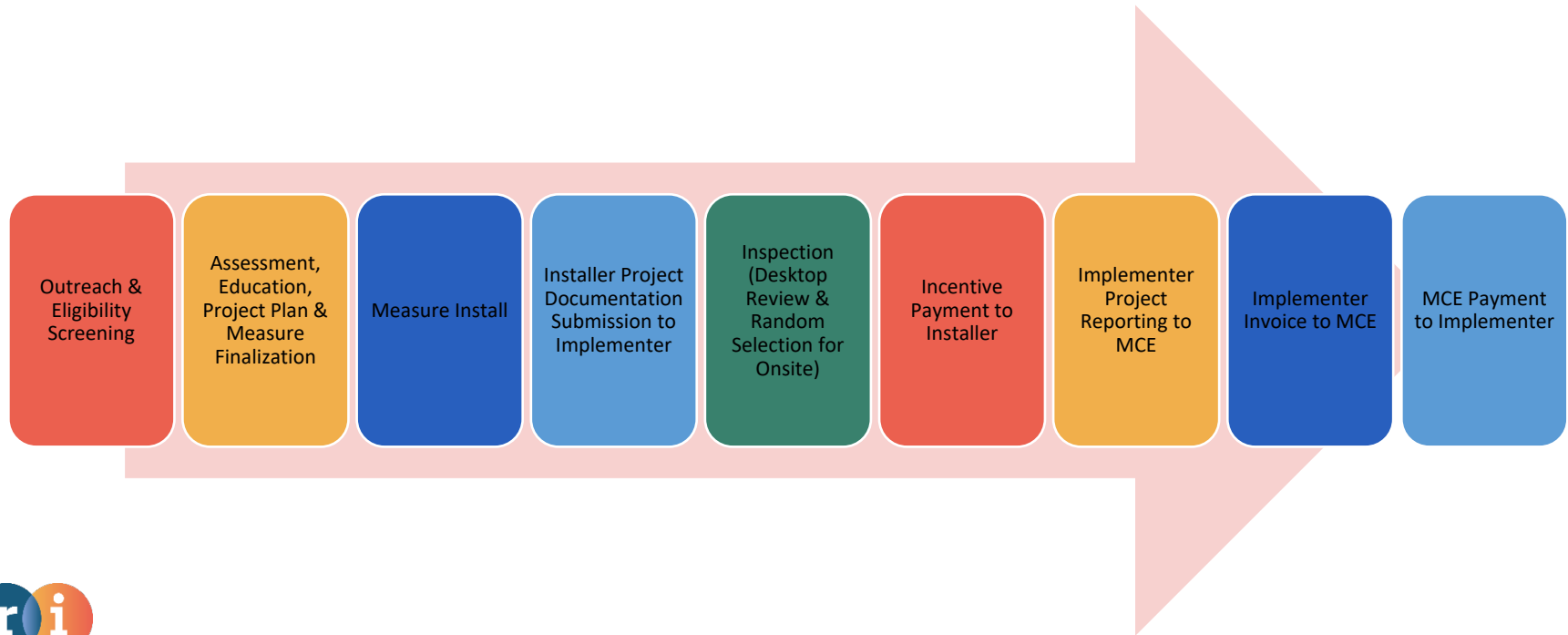


Program Overview: Success Metrics



Primary	Secondary
# Customers/Participants Served	Energy Savings
Bill Savings	Greenhouse Gas Emissions Reduction
NEBs	# Disadvantaged Contractors/Workers Served

Program Overview: Program Process



Program Overview: Program Management Tool



iEnergy

- Site assessment and facilitation
- Project facilitation
- Ensures project quality and data accuracy
- Facilitates program tracking & reporting
- Installer Network management via iEnergy



- Eligibility screening & enrollment
- Assessment details
- Document measure installations



A photograph of two women in a greenhouse. The woman on the left is younger, with dark hair, wearing a blue and white checkered shirt and a dark apron. The woman on the right is older, with short grey hair, wearing a white shirt and a dark apron. They are both smiling and looking at a tablet computer held by the younger woman. The greenhouse is filled with rows of potted plants, including many purple and pink flowers. The background shows the structure of the greenhouse with translucent panels.

Customers: Eligibility, Targeting & Strategies

Customers: Eligibility Part 1

- Eligible businesses must be located in MCE's service area,
- Have an active commercial PG&E account with a peak demand value of 50 kW or less,
- Not be considered a commercial chain (customer has less than 5 locations), and
- Operate within a designated ESJ Community or be considered Hard-to-Reach (HTR).



Customers: Eligibility Part 2

The Program focuses exclusively on small businesses located in Environmental and Social Justice (ESJ) Communities and/or meet the criteria of Hard-to-reach (HTR).



ESJ Communities are defined by the CPUC as:

- Disadvantaged Communities (DACs) (as determined by CalEnviroScreen),
- Low-income census tracts – (80% or below of county average median household income), and/or
- Tribal Lands

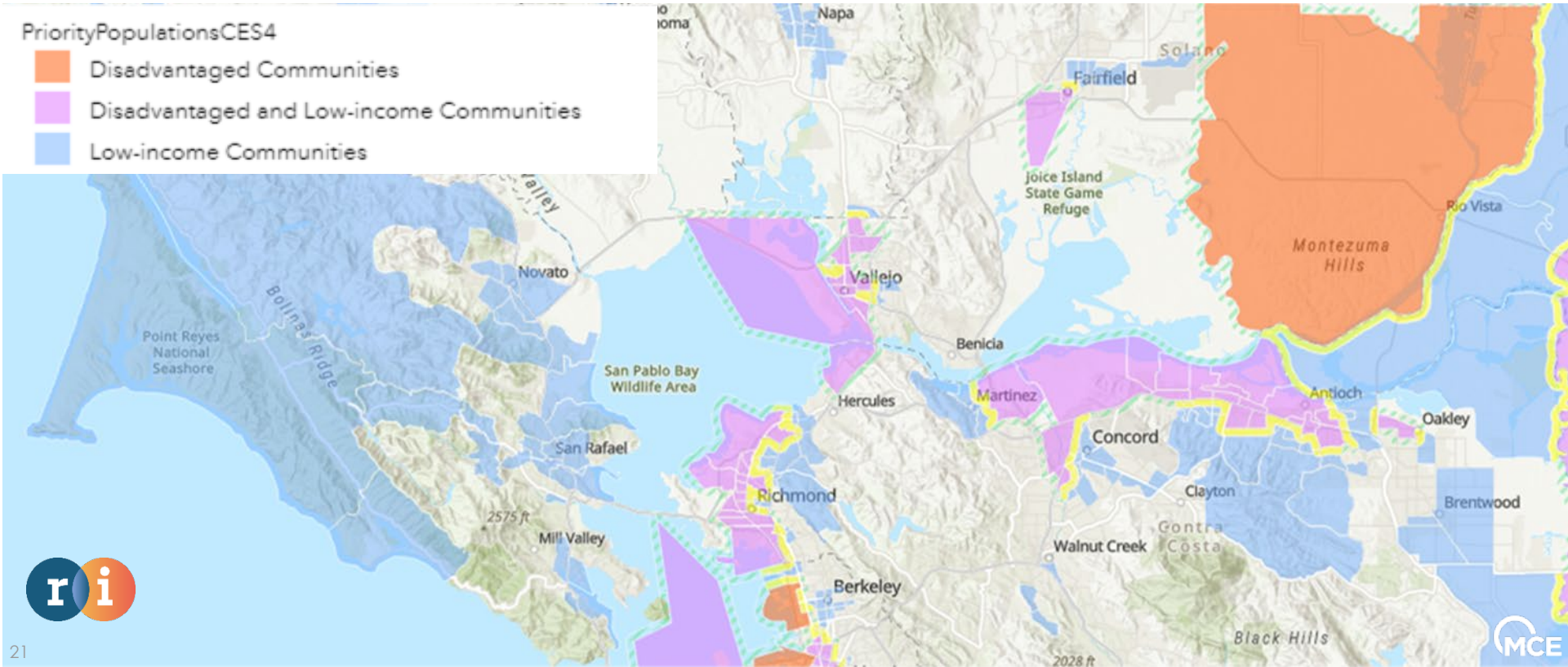
HTR criteria:

- English as a second language,
- Less than 25 employees and/or less than 20 kW demand, and
- Rent or lease

Customers: Targeted Service Area

PriorityPopulationsCES4

- Disadvantaged Communities
- Disadvantaged and Low-income Communities
- Low-income Communities



Customers: Targeting & Outreach



Outreach Partner Network

- The Program leverages a network of local small business-focused Outreach Partners, including Green Business Programs (GBPs) and Community-Based Organizations (CBOs)
- Outreach Partners are equipped with tools, training, and support to actively promote the Program within their communities
- CBOs and GBPs enrolled as Outreach Partners are eligible to receive compensation for outreach efforts through dedicated Program funds and leveraging outside grants

Customers: Market Support Strategies



PROGRAM
WEBPAGE



COLLATERAL



SOCIAL MEDIA
ENGAGEMENT



DIRECT MAIL
CAMPAIGNS



DOOR-TO-DOOR
CAMPAIGNS



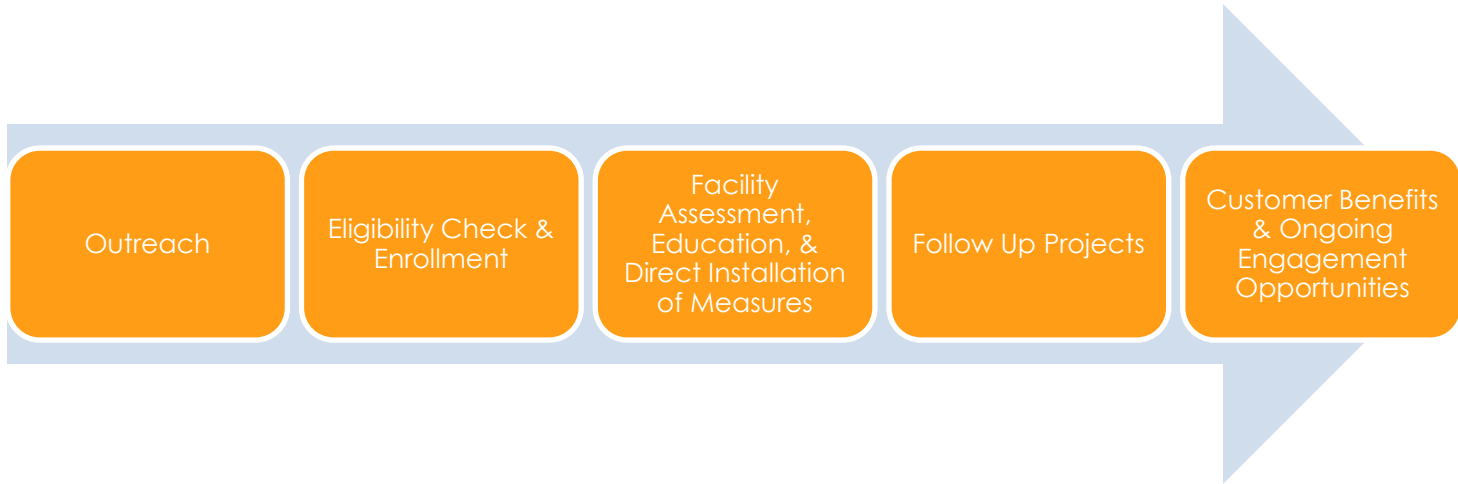
COMMUNITY
EVENTS



CUSTOMER
SURVEYS



Customer Journey



CAGBN & CBOs

Community Campaigns

RI & EI Targeted Marketing

Same-Day possible

Concierge service

Same-Day possible

Assessment by EI and/or Installer

Verification by RI

Increased Depth of Intervention

Verification by RI

Customer Satisfaction Survey

NEBs Assessment

Referral to Relevant MCE Programs



Timeline



Program Timeline



February 2024

- Program Implementation Plan
- Measure Development
- Installer Recruitment

March – April 2024

- Marketing, Engagement & Outreach Plan
- Customer and Installer Agreement Development

May – July 2024

- Execute subcontracts with outreach and installation partners
- Software Configuration
- CRM Integration
- CPUC Public Webinar

August 2024 – December 2026

- Customer Outreach
- Identify & Initiate Community Campaign in partnership with MCE
- Installer Referrals, Assessments & Installations
- Continuous Improvement of Systems & Processes
- Expected program completion date: 12/31/2026



Q&A

Program Contact



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Thank You

