

# Innovative ME&O– Demand Building Statewide

*David M. Cohen, LEED AP BD+C*

Center for Sustainable Energy  
under the auspices of the CPUC

# Center for Sustainable Energy (CSE)

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Center for  
Sustainable Energy™

- Mission driven not-for-profit focusing on statewide goals
- Energy Project Financing Mission
  - Create a comprehensive cross-market sector ME&O plan
  - Uses best practices determined through extensive market research
  - Leverage existing partners and resources as much as possible

# Energy Upgrade CA – Brand Mission

- To create conscious, engaged, energy managers across California who will help reach the state's goals.

DR/Timed Rates

**Financing**

Small Business

Home Automation

Water and Energy

Climate Credit

Home Upgrade

ESAP

Cold Weather / Lights

Play Your Part

Home Upgrade

Climate Credit

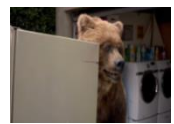
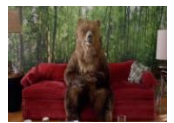
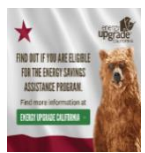
Lighting

Flex Alerts

Appliances

Water and Energy

Climate Credit



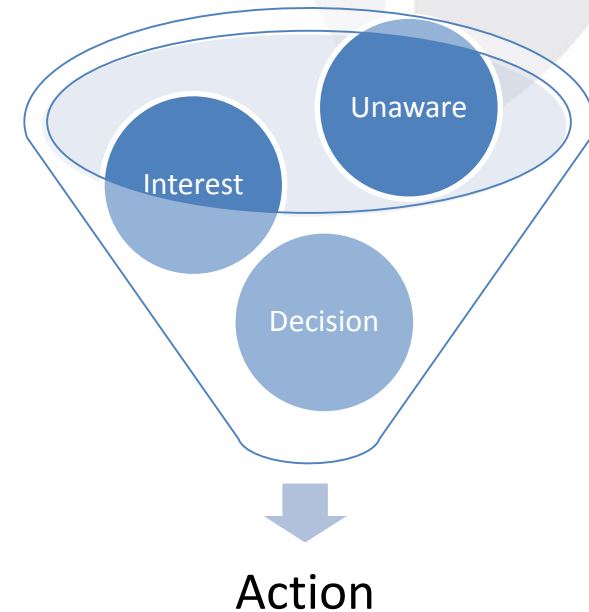
# Intent of Statewide Financing ME&O



# Target Audiences

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- Building owners or decision makers
- Mid-funnel consumers
- Differs between residential and non-residential
  - Property managers or lawyers may be the decision makers on large-scale commercial properties



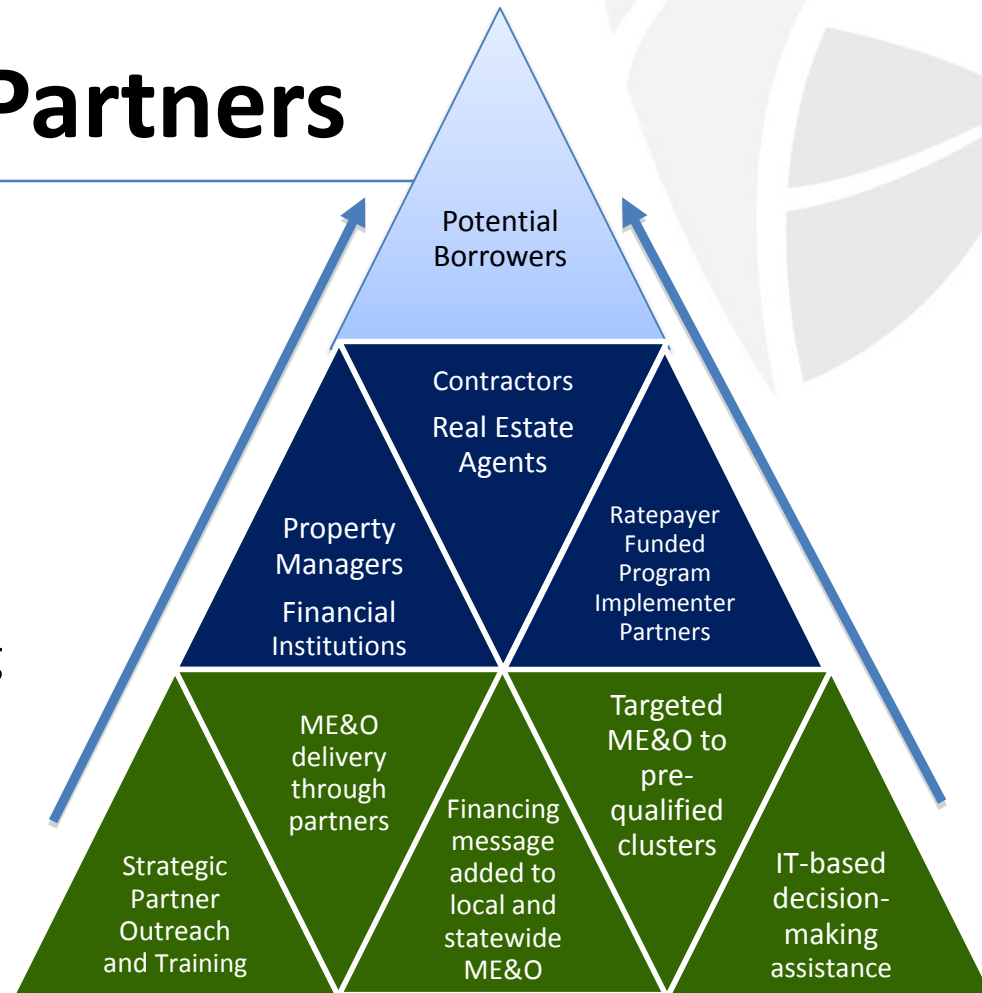
# General Strategy

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- Two-pronged marketing campaign
  - Build value proposition for Strategic Partners
  - Help them build value proposition for their spheres of influence
- Simplify process for consumers to decide on which financing program works for them
- Facilitate easy communication with lenders
- Adapt quickly, based on feedback

# Primary Strategic Partners

- Residential and Small Business
  - Contractors, IOUs, Financial Institutions, RENS/CCAs
  - Statewide ME&O
    - Retail, CBO, Mobile Marketing Channels, Experiential
- Non-Residential
  - Property Management Cos, Commercial RE Brokers
  - Distributors, Manufacturers, Lenders



# Innovations in Strategic Partner Training

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- Online Interactive Training Platform
  - Multiple stakeholders within orgs can take training
  - Integrated with other training modules
  - “Student” earns prizes for extended participation
- Video Marketing
  - Training modules delivered with quizzes and handouts
  - Micro learning has higher level of retention than workshops and webinars



# Partner Outreach to Target Markets

- Customized ability to add financing messaging to existing program materials
- Develop marketing toolkits for Strategic Partners to deliver messaging to the audiences that trust them



# Cooperative Marketing




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- Contractors and Financial Institutions
  - Print-on-demand site with cobranding and drop shipment of collateral and promotional materials
  - 50% cost share on custom advertising
  - Performance bonuses based on loans closed
- Micro grants through open solicitation
  - Pot of funding for “makes sense” ideas to receive 50% cost share

# Technology to Simplify Consumer Journey

Total Eligible for Financing						
We've matched financing options to your action plan						
\$43,175	PACE	On-Bill Repayment	Secured	Solar Specific	Unsecured	
 Seal your heating/cooling system air ducts <small>Eligible for Home Upgrade Program</small>	✓	✓	✓		✓	✓
✓ <b>\$578</b>						
 Seal key areas where air leaks out of your home <small>Eligible for Home Upgrade Program</small>	✓	✓	✓		✓	✓
✓ <b>\$1,100</b>						
 Install (more) foundation insulation <small>Eligible for Home Upgrade Program</small>	✓	✓	✓		✓	✓
✓ <b>\$2,475</b>						
 Install solar panels for electricity generation	✓		✓	✓	✓	✓
✓ <b>\$35,133</b>						
 Replace your refrigerator with an energy efficient model			✓		✓	✓
✓ <b>\$890</b>						
 Replace your clothes dryer with a gas-powered, energy efficient model			✓		✓	✓
✓ <b>\$900</b>						
 Replace your pool floor pump <small>Eligible for Home Upgrade Program</small>	✓	✓	✓		✓	✓
✓ <b>\$2,100</b>						
<b>Total Financing Available</b>	<b>\$41,385</b>	<b>\$6,253</b>	<b>\$43,175</b>	<b>\$35,133</b>	<b>\$43,175</b>	
<b>Out of Pocket</b>	<b>\$1,790</b>	<b>\$36,923</b>	<b>\$0</b>	<b>\$8,043</b>	<b>\$0</b>	

Financing Finder on Energy Upgrade CA website as part of the WISER<sup>®</sup> energy management tool

Secured					
A Secured Loan is a loan in which the borrower pledges some asset (e.g. property) as collateral for the loan. An example of a secured loans is a home equity loan, which is often used for home improvements.					
Eligibility Req: At homeowner discretion					Provider ▾
Improvements: Energy & water efficiency					
Vendor	Estimated Pmt-Month	Interest Rate (%)	Financing Available	Duration	
 Green Street Lending	\$849 (at 5 years)	6.5% - 8.25%	\$5,000 - \$150,000	5 to 25 years	Apply ▾
 PowerSaver Loan Program	Market rate	Market Rate	Up to \$25,000	15 years efficiency	Apply ▾
	\$378	6.5%	Up To \$50,000	15 years	Apply ▾

# Technology to Simplify Consumer Journey

- Financing Concierge System (FCS)
- Online chat module linking to IOU energy advisors providing hand-holding services for both financing and rebates

Which of these 2 (hypothetical) 'projects' do you prefer?  
(given they're identical in all other respects)

Likely effectiveness of the proposed solution  
**< 40% effective**

Fit with the organisation's strategic priorities  
**Medium**

**this one**

this one is impossible

OR

Likely effectiveness of the proposed solution  
**41 - 60% effective**

Fit with the organisation's strategic priorities  
**Low**

**this one**

this one is impossible

**they are equal**

[« undo last decision](#)
[skip this question for now »](#)

41% complete (67 of 162 potential questions) \*

www.nomajordrama.co.nz/Application/Results

home > intro (optional) > choose criteria > make decisions > **results**

**Your results!**

[SHARE](#)
[start over](#)

Here is your ranking of 181 subject areas\*  
Click areas for info and majors – across all 8 NZ universities (730 majors in total).

Rank	Subject Area	Percentage
1	Māori Health	185%
2	Māori Studies	142%
3	Māori Media Studies	145%
4	Māori Development	142%
5	Teaching – Māori Language	150%
6	Māori Visual Arts	114%
7	Māori Language / Te Reo Māori	137%
8	International Business	158%
9	International Studies	138%
10	Pacific Island Studies	142%

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- 43 course modules
- Certificate of completion
- Free Microsoft Office app

www.nomajordrama.co.nz/Application/Criteria

home > intro (optional) > **choose criteria**

**What matters most to you?**

For majors you might be interested in studying. Choose 2-7 things.

**I'm good at, or want to develop**

- scientific skills and knowledge**  
such as biology, chemistry or physics
- creative or artistic skills**  
such as art, creative writing or design
- performing arts skills**  
such as dance, drama or music
- physical fitness**
- non-English language skills**  
Māori, French, Chinese, etc
- inter-personal skills**  
communication and empathy
- practical skills**  
making or working with things
- quantitative skills**  
working with numbers
- mathematical or statistical skills**  
such as algebra, calculus or regression
- hi-tech equipment skills**  
including non-standard IT
- teaching skills**  
for teaching others

**I'm interested in**

- Earth's environment, places or physical features**
- plants**
- animals**
- the physical world and universe**  
non-living phenomena, the cosmos, etc
- how the human body works**
- individual human behaviour**
- how human society in general works**
- the business world and commerce**
- te ao Māori**  
Māori culture, language, business, etc
- world culture and arts**  
other than Māori (see above)
- religion or theology**
- world current affairs or history**  
potentially including New Zealand
- working with and helping people**
- technology**  
all sorts

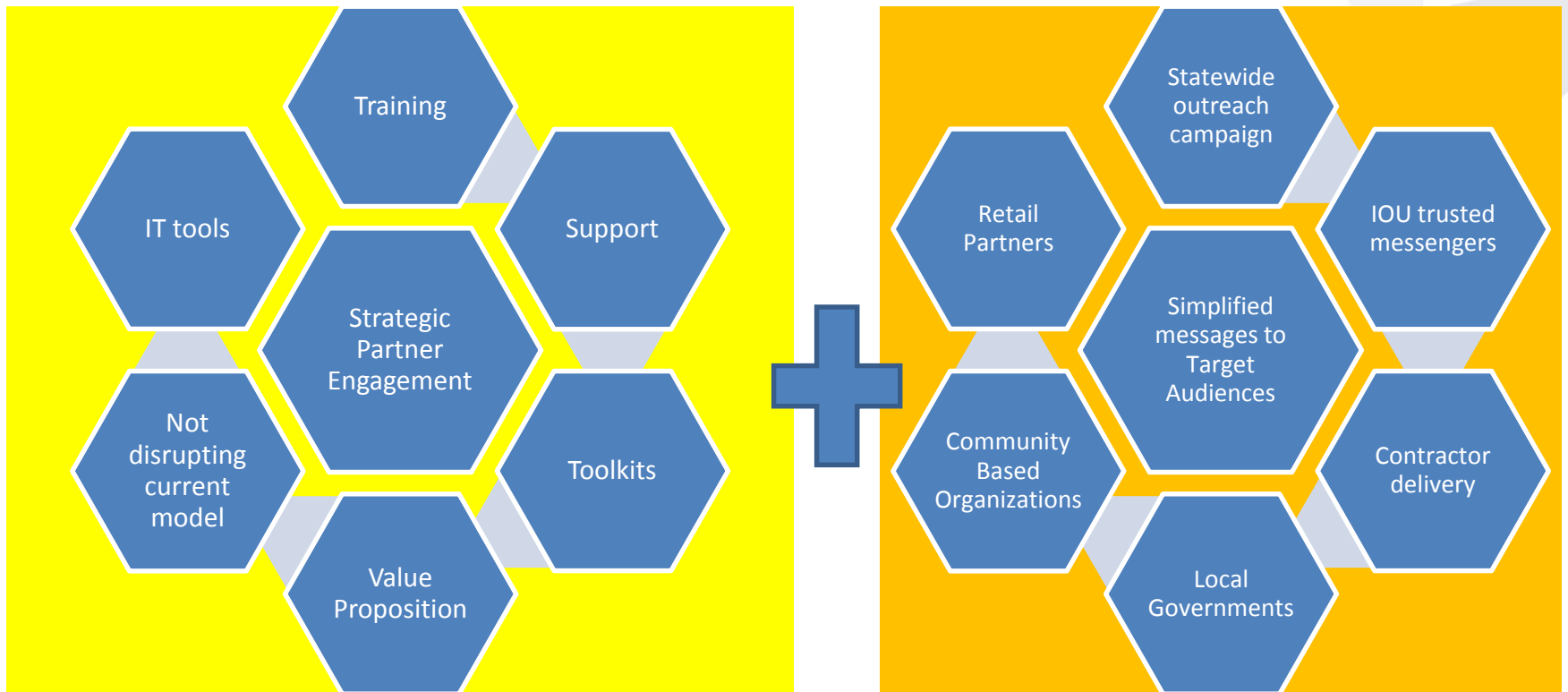
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# Simple yet effective approach



# Roll-out Schedule

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Milestone Description	Timeline
Single Family Residential ME&O launch	End of June, 2015
Digital Media Campaign and SWMEO promotion	August-October, 2015
EFLIC pilot in PG&E territory	Q3, 2015
Non-Residential w/OBR launch	Q4, 2015
Review of progress and programming of reserve budget	March-April, 2016
Refresh of marketing materials/campaign	Q2-Q3, 2016
Pilot program completion	Approximately Q4, 2017

# Contact us for more information

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