

Direct Install Programs and the Impact of Community Outreach and Education

Kimberly Rodriguez and Melanie Goforth, Southern California Edison

ABSTRACT

Southern California Edison's Direct Install Program delivers free energy efficiency hardware retrofits to reduce peak demand and achieve energy savings for commercial small business customers in a geo-targeted delivery approach, providing for a more efficient, comprehensive Program. Additional Program interactions include working closely with Faith-Based and Community-Based Organizations as job development partners, creating and providing jobs in addition to the contract deliverables, and thus establishing a partnership in the community that otherwise might not have been realized.

In 2009, a strategic Program evaluation identified the opportunity to increase customer participation beyond the historical take rate of 36% through the use of targeted marketing and outreach efforts. Typical methods used had been contractor-assigned city sweeps and minimal Program collateral. SCE piloted a collaborative effort with internal stakeholders including Marketing, Partnerships, Business Customer Division and Public Affairs as well as external stakeholders such as Chamber of Commerce, Affinity Groups, and City Officials. Outreach included customized mailers, Energy Walks, media events, City and County events, and in-language presentations. The result was a take rate of over 55%, nearly doubling the historical rate. SCE installed over 10,000 customers with energy savings of 45 GWh and a demand reduction of 9.6 MW.

The job development activity has produced over 30 skilled workers during 2010-2011. The at-risk individuals were provided the opportunity to learn key skills ensuring marketability, in both the commercial and energy efficiency market segments such as clerical, energy auditing, and installation skills.

Program Overview

Across the nation, Direct Install Programs are characterized by delivering turnkey solutions that make it easy and affordable (sometimes free) to retrofit to high efficiency equipment. At its core, Southern California Edison's (SCE) Direct Install Program is no different. It delivers free energy efficiency hardware retrofits and installation services to a hard-to-reach customer segment in order to reduce peak demand and achieve energy savings. The Program targets small businesses with monthly demand of less than 100 kW. What is different about SCE's Direct Install Program is a comprehensive community outreach strategy and a Green Job Skills Training component.

The community outreach strategy defines geographical targets and identifies community resources that, in partnership with SCE resources, engage in activities that credibly raise awareness for the Program and effectively realize capture (participation by eligible customers contacted with energy efficiency opportunities). Meanwhile, the Green Job Skills Training component has found the perfect conduit in community resources, such as Community Based Organizations (CBOs) and Faith Based Organizations (FBOs), to create jobs, stimulating local

economies. During the current Program cycle (2010/2012) the outreach strategy and training components have resulted in a near two-fold increase in the Program's historical capture rate and produced over 30 skilled workers ready to take on green jobs. Capture rate for this program is calculated as the number of customers who participate in the program compared to all customers in the targeted population that had potential for EE retrofits.

Community Outreach Strategy – A Successful Evolution

The Program was launched in the 2004/2005 program cycle with the chief goal of providing energy efficiency retrofits to the hard to reach small business customers. Since its launch and into 2009, the primary outreach model was door-to-door cold calling by the Program's Contractors —California Retrofit, Inc. (CRI), Faith Management Consultants, Inc. (FCI), and FESS Energy, Inc. (FESS). That outreach model delivered a modest capture rate of 36 percent. Modest, considering the resources deployed to implement the Program.

In 2009, an analysis of participation data and input from the Program Contractors identified several barriers to adoption. Among them were cultural and language barriers, lack of trust in Program Contractors, and lack of Program awareness. With the goal of increasing awareness and driving participation, the Direct Install Team (the Program Team) piloted evolving its outreach strategy from one that heavily relied on the premise that a "free" retrofit was enough to realize capture to one that called for a concerted, comprehensive effort to raise program awareness and delivery channel credibility while being sensible to culturally driven needs, such as language preferences. The Program called it the "Collaboration Pilot."

By mid-2009, the Program Team had established a cross-functional collaboration team of internal and external stakeholders. Internal stakeholders included Business Customer Division (Customer Account Representatives), Local Government/Institutional Partnerships, Public Affairs, and Marketing. External stakeholders included Chambers of Commerce, affinity groups, city officials, and community volunteers. While their degree of involvement varied, all stakeholders committed to the new community outreach strategy and delivered on its execution. To raise awareness and address culturally driven needs, new Program tactics included:

- in-language letters, collaterals, and presentations
- press releases
- media, city, county, and ethnic events sponsorships

To raise awareness and delivery channel credibility, the Program Team, the Energy Efficiency Outreach Team (EEOT - a Business Customer Division team), city officials, and community volunteers conducted pre-emptive Energy Walks (i.e., before Program Contractors did their city walks), talking to customers about the Program's offerings and assuring the legitimacy of the Program Contractors that would soon visit them. By early 2010, roughly 6 months after implementation of the new strategy, the Program's captured rate had increased to an impressive 56 percent (up from the historical (pre-collaboration effort) 36 percent).

One example of a community outreach success story took place in the primarily Vietnamese Westminster and Garden Grove communities. The EEOT team and the Public Affairs representative worked closely with city officials, the local affinity group, and a locally operating bank to conduct in-language community outreach. Press releases were published, public forums held, and a community Energy Walk conducted. As a result, the communities

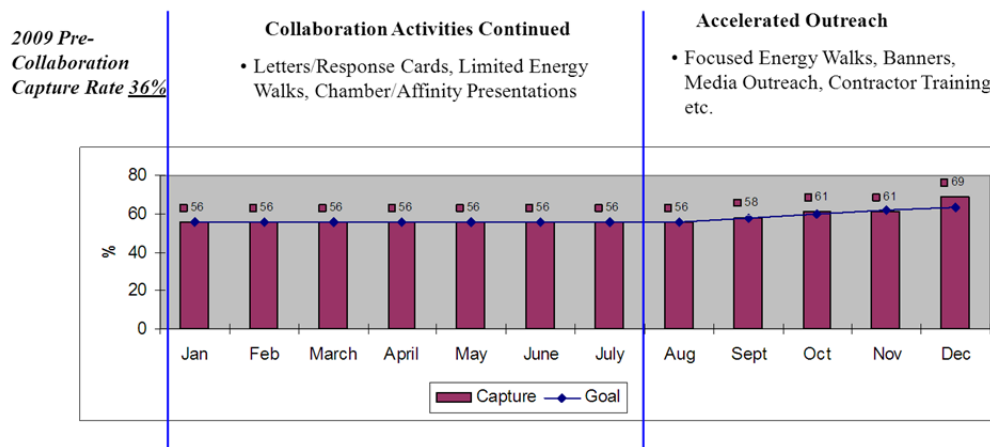
realized a capture rate of 80 percent and energy savings of 0.15 GWh and 0.05 MW. The average customer saved \$50 - \$100 per month. During the peak of the economic downturn, the Program made a substantial difference in these communities, overcoming the communications and trust barriers of the past.

As a result of the successful 2009 activities, SCE incorporated the community outreach strategy into the 2010/2012 Direct Install Program cycle. This would prove timely as the Program Team was soon challenged to meet its 3-year goal in less than half the time. Adding to the challenge, the Program Team set an aspirational goal of increasing the capture rate to 65 percent.

The magnitude of the challenge required aggressively focusing on high-potential communities with strike-force tactics. The Program Team timely secured buy-in at all levels of the SCE organization for additional resources and deployed a larger cross-functional collaboration team. As it had in the latter half of 2009, the community outreach strategy proved to be the silver bullet to addressing barriers to participation, thus being the catalyst that helped the Program commit 100 percent of the kWh goal at the end of the challenge and the remainder of the kW goal in the subsequent 3 months. Additionally, at 69 percent, the aspirational goal was aspirational no more.

These and earlier results proved that outreach supported by a cross-functional, collaborative team could greatly impact Program performance.

Figure 1. Program Capture Rate: 2009 Pre-Collaboration Pilot vs. Final 2010



Green Job Skills Training Component

The Program’s job skills training component has been a valuable asset since 2006. Delivered by two of the Program Contractors (FCI and FESS) in coordination with the CBO/FBOs community, it creates jobs and stimulates local economies by offering job skills training opportunities to at-risk youth and unemployed individuals seeking to gain a marketable skill set in the energy efficiency industry. Because of their grassroots in the communities, the CBO/FBOs are key in outreaching and identifying potential training participants.

As the implementers of this component, FCI and FESS are responsible for monitoring its budget, schedules, and marketing to the local CBO/FBOs to identify opportunities for partnership. They are also responsible for managing and overseeing the delivery of the training, which is sub-contracted.

Expectations and Qualifications of CBO/FBO Partners

Finding and associating the Program with fitting and deserving CBO/FBOs that can responsibly and effectively manage the available resources to deliver the goals of the Green Job Skills Training component is crucial to the Program success. Thus, Program Contractors have high CBO/FBO recruitment expectations ranging from the organizations' current reach in the communities to their proven ability to effectively promote, recruit, hire, deliver the training, and manage selected administrative tasks.

Qualifying CBO/FBOs must have a strong history of faith or community based accomplishments. These organizations must also provide a list of programs they currently manage, cities in which the organization is involved, and language specialties and technical abilities of staff. Additionally, they must provide service to local Southern California communities, have an objective, mission statement, list of officers, board of Directors / principals in the organization, and maintain professionally audited financial statements. Currently, the Program retains the following five qualified CBO/FBO Partners:

1. **PV JOBS.** A non-profit corporation which provides employment opportunities to at-risk local residents at the Playa Vista development site.
2. **South Los Angeles County Workforce Investment Board.** A CBO specializing in helping people gain the skills and confidence necessary to find job and career opportunities that lead to self-sufficiency and long-term employment.
3. **Kingdom Causes Bellflower.** An FBO engaged in asset-based community development in the Bellflower community.
4. **Korean Youth and Community Center.** A non-profit, CBO serving the Korean American Community since 1975.
5. **Success in Challenges.** A non-profit, grass-roots social service agency largely serving the greater Long Beach community.

Qualifications for Participation in Job Skills Training Component

From the CBO/FBO Partners' marketing efforts, the community residents become aware of the training opportunities and learn of the three-step screening and application process:

1. Submit an application with resume.
2. Attend a formal interview.
3. Be cleared by a full background check.

To qualify, applicants must successfully pass/meet the three-step screening and application process, be at least 18 years of age, be currently unemployed, and possess a good work ethic and a strong desire to work in the energy efficiency industry. An applicant who meets the qualification and demonstrates an aptitude to learn and thrive is given the opportunity to participate in the paid, 6-month Green Job Skills Training.

Training and Mentoring

The Green Jobs Skills Training curriculum is designed to give participants a deep understanding of small business operations as well as the energy efficiency industry. At the end of the six months of in-class and on-the-job training, participants would have developed valuable skill sets and industry experience ranging from business operations to project management to energy efficiency lighting standards and technologies. They would have also experienced interacting with customers and key stakeholders and gaining visibility to their decision making processes, all ultimately critical to the development of marketable job skills. Past trainings have included Leadership in Energy Environmental Design, energy efficient lighting upgrades, and resume preparation. Sub-contractors play a large role in the delivery of the training.

Sub-contractors maintain an instrumental role in mentoring training participants by partnering them with industry professionals that then provide hands-on experience opportunities as well as employment opportunities, upon graduation.

The following is a brief list of in-class and on-the-job training provided:

- computer skills, including database management and data entry
- solar film technologies and installation
- efficient lighting technologies and lighting controls installation
- comprehensive energy audits
- program marketing
- program inspections
- work order scheduling
- apprentice level installation work
- customer satisfaction survey administration
- material warehouse management

Program Graduation

To graduate, participants must successfully complete the 6-month training. Graduation activities consist of a luncheon to recognize successes, highlight work activities, and recognize CBO/FBO involvement. Certificates and mementos of the Program are presented to each graduating participant. Graduations are held every six months with approximately 10 graduating participants per class.

Successes

The Program's Green Job Skills Training component is beneficial to the greater Los Angeles community in numerous ways, particularly in times of economic recession. Qualified individuals who are most at risk during these times (e.g., minorities, the young, the elderly, and those without a college degree) are given an opportunity to obtain new skill sets in a growing economic segment as is energy efficiency. This training gives hope to individuals and is a helpful incubator in starting them down a new career path with promising opportunities.

Although data availability limits measuring the full impact of this Program's component, in the past six years, the Green Job Skills Training component has had 90 participants. An

estimated 80 percent graduated, with 80 percent of them securing full-time employment with the very companies that provided them training and mentorship.

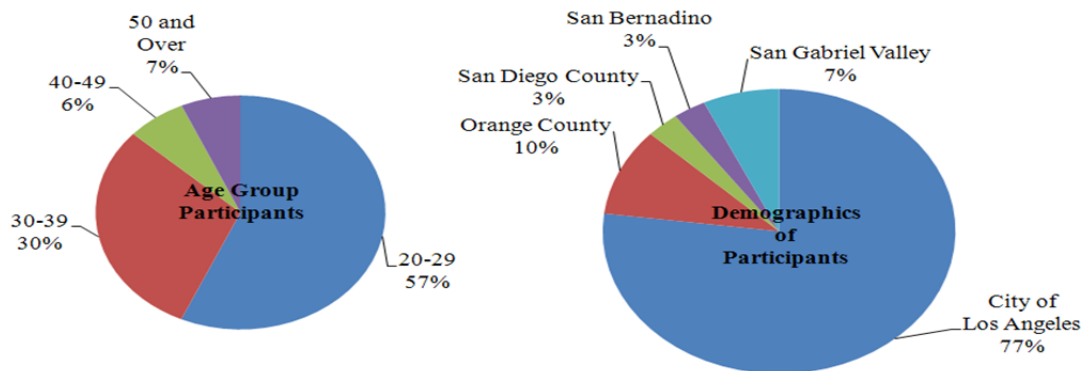
SCE expects trained graduates to have a higher chance of continued employment, continued opportunities to enhance their newly learned skills, and continued desire to make a positive difference within the work force and their communities. The Green Job Skills Training component is seen as a valuable contributor to the overall Green Jobs movement and will continue to be offered in the future.

Participants Demographics

Most participants are at-risk young adults, unemployed minorities, and residents of the City of Los Angeles. Out of the 30 participants involved during 2010-2011, 27 graduated. Sixteen of the graduates have been employed. Turnover rate has remained low at 10%.

Figure 2. Participant Demographics for 2010-2011

Race/Ethnic of Participants	Gender		Percentage	Graduated	Hired
	Male	Female			
Black/African American	0	2	6.67%	2	1
Hispanic/Latino	4	7	36.67%	10	8
Asian or Pacific Islander	2	2	13.33%	3	0
American Indian/ Alaskan Native	2	1	10.00%	3	2
Filipino American	0	1	3.33%	1	1
Caucasian	6	3	30.00%	8	4



Conclusion

For nearly 8 years, SCE's Direct Install Program has positively impacted thousands of small business customers by helping them maximize their energy use and lower their energy cost through energy efficiency hardware retrofits and installation services. The Program became most impactful after piloting, and later fully deploying, a thoughtful community outreach strategy that successfully addressed several of the identified barriers to participation, including culture and language barriers, lack of trust in Program Contractors, and lack of Program awareness. Yet, the Program's impact goes beyond the small business customer community. Since 2006, the Program's Green Job Skills Training component has positively affected the livelihood of communities through job creation and stimulation of local economies during times of greatest need.

Money saved, energy usage reduced, jobs created, and stimulation of local economies can be measured and directly correlated to the Direct Install Program. But, there are impacts we have not and likely could not fully measure. Impacts such as empowering the Program's participating customers and trainees to "pay it forward" in their communities — to fight hard to keep their doors open, to invest in people, to save energy and resources.

Both the community outreach and awareness strategy and the Green Job Skills Training component are at the core of the Program's success and exponential increase in capture rate. Most importantly, their adaptability to other programs is promising, hopeful.