

# **Southern California Regional Energy Network**

## **Implementation Plan**

**Public Agency Project Delivery Program**

**First Filing Date: 2/28/2020**

## **Table of Contents**

<b>Program Budget and Savings Information</b>	<b>3</b>
Program Information	3
Program Implementer	3
<b>Implementation Plan Narrative</b>	<b>6</b>
Program Description	6
Program Delivery and Customer Services	7
Program Design and Best Practices	8
Evaluation, Measurement, and Verification (EM&V):	10
Program Performance Metrics	12
Quantitative Program Targets	13
Pilots	14
Program Logic Model	14
Process Flow Chart	15
Diagram of Program	15
Additional information	16
For Market Transformation Programs Only	17
Quantitative Baseline and Market Transformation Information	17
Market Transformation Strategy	17
<b>Appendix: Supporting Information and Documents</b>	<b>17</b>
Program Manuals and Program Rules	17
Incentive Tables, Workpapers, Software Tools	19

# 1. Program Budget and Savings Information

## a. Program Information

<b>Program Name</b>	SoCalREN Public Agency Energy Efficiency Project Delivery Program
<b>Program ID#</b>	SCR-PUBL-A1

## b. Program Implementer

<b>Program Implementer</b>	<b>Yes</b>
SOCALREN Only	
SOCALREN – Statewide Lead	
Other PA – Statewide Lead	
Third Party	X
Other	

## c. SOCALREN Business Plan Sector

<b>SOCALREN Business Plan Sector</b>	<b>Yes</b>
Residential	
Commercial	
Industrial	
Agricultural	
Public	X
Codes & Standards	
Workforce Education & Training	
Finance	
Other	

## d. Program Type

<b>Program Type</b>	<b>Yes</b>	<b>No</b>
Resource		X
Non-Resource	X	

**e. Intervention Strategies**

<b>Primary Intervention Strategy</b>	<b>Yes</b>	<b>No</b>
Upstream		X
Midstream		X
Downstream	X	
Direct Install		X

**f. Projected Program Budget**

Budget Data on CEDARS?:  Yes  No If No, then show below:

**g. Savings Impact**

Savings Impact Data on CEDARS?:  Yes  No If No, then show below:

**h. Program Effectiveness**

Effectiveness Data on CEDARS?:  Yes  No If No, then show below:

## 2. Implementation Plan Narrative

### a. Program Description

*Describe the program, its rationale, and objectives.*

The goal of the Southern California Regional Energy Network's (SoCalREN) Public Sector is to identify and implement cost-effective energy efficiency projects that yield electricity and gas savings for local governments and communities across the region. In order to achieve this goal, the SoCalREN Public Agency Energy Efficiency Project Delivery Program (PDP) aims to achieve the following objectives:

1. Expand the implementation of cost-effective energy efficiency projects;
2. Make energy efficiency expertise accessible and available; and
3. Integrate energy efficiency as a standard business practice for public agencies.

The PDP offers energy efficiency services to over 700 eligible public agencies in the Southern California Edison (SCE) and Southern California Gas (SCG) service territories - including cities, counties, tribes, school districts, water districts, sanitation districts, and other special districts - to help agencies reduce energy and maintenance costs at public sites and facilities. This program is a continuation of the Southern California Regional Energy Center (SoCalREC) that was described in the Program Implementation Plans (PIP) filed<sup>1</sup> in 2013 and 2015. It is delivered through a third party implementer who designed the program and is responsible for securing and coordinating all program resources and services to meet all program objectives and targets. This implementer works closely with SCE and SCG for public agency engagement and funneling savings to investor owned utility (IOU) resource programs, as well as with the Local Government Partnerships and third-party programs, to drive cost-effective energy solutions.

At no cost to agencies, the PDP identifies energy saving measures and works side-by-side with public agency staff throughout the project lifecycle, from performance specification to construction completion, to implement energy efficiency strategies. To date, the PDP has 122 enrolled agencies, with over half of those served in disadvantaged communities<sup>2</sup> and has funneled over 60 million kilowatt hours (kWh), 2 megawatts (MW) and 125,000 therms<sup>3</sup> to IOU resource programs.

### b. Program Delivery and Customer Services<sup>4</sup>

*Describe how the energy efficiency (EE) program will deliver savings (upstream, downstream, direct install, etc.), how it will reach customers, and the services and it will provide.*

The PDP delivers savings by offering public agencies comprehensive and customized project management and technical engineering services through a third party implementer to implement cost-effective and streamlined energy efficiency projects. The PDP aligns with IOU downstream intervention strategies and programs, and actively works to ensure other IOU offerings, such as the upstream, midstream, direct install, and IOU third party programs, are leveraged when feasible. After enrollment

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<sup>1</sup> 2013 Program Implementation Plan (PIP), [https://socalren.com/sites/default/files/Public\\_Agency\\_PIP.pdf](https://socalren.com/sites/default/files/Public_Agency_PIP.pdf)

<sup>2</sup> Based on facility zip code leveraging CalEnviroScreen 3.0 criteria.

<sup>3</sup> Cumulative first year gross savings as reported by SCE and SCG from 2013 through 2018

<sup>4</sup> IP Guidance from D.15-10-028: "Describe how the energy efficiency (EE) program will deliver savings (upstream, downstream, direct install, etc.), how it will reach customers, and the services and [sic] it will provide."

into the program, each agency is assigned a dedicated project delivery team comprised of project management staff and an assigned engineering firm. Throughout project identification and implementation, the project delivery team works with the agency to address project challenges and proactively identify solutions.

The PDP utilizes a multi-phase project delivery process to move agency projects from planning and identification to execution and completion. Each phase is made up of sub-tasks to ensure industry best practices, agency alignment, utility coordination, and cost-effective solutions are implemented throughout the project life cycle. The following is a high-level overview of the program delivery process and customer services deployed by the PDP.

Enrollment and Project Identification: An agency is considered enrolled in the PDP once it signs a non-binding enrollment form that acknowledges PDP participation, responsibilities, and services. The enrollment process begins with an initial engagement presentation to introduce SoCalREN Public Agency Programs in coordination with the IOUs, Local Government Partnerships, and other applicable program partners. The enrollment form is presented to the agency during this meeting; program services are not offered until the form is signed and returned. Enrollment in the PDP also gives Public Agencies access to other available SoCalREN Public Agency Programs. Once enrolled, a PDP project manager is assigned to the agency to begin the project development process.

After enrollment, an agency-wide energy analysis is prepared for the agency. The analysis provides a portfolio-wide snapshot of energy consumption and cost by sector (i.e. water and wastewater pumping, street lighting, facilities, and outdoor lighting), and estimates the potential energy and financial impacts of potential retrofits. The analysis is used as a tool to help identify and develop energy efficiency project opportunities.

Audit: Once a project is identified, the agency is asked to sign a project commitment form that communicates program services and records the agency's commitment to pursue a viable project prior to the investment of limited program resources. The PDP project manager then works with the designated engineer to complete a detailed facility or site visit and identify a preliminary list of recommended energy efficiency measures to present to the agency. After the agency selects which energy efficiency measures to implement, the engineer and PDP staff work together to prepare audit calculations and a project proposal that recommends operational and maintenance improvements and/or upgrades to equipment and controls. The proposal details the business case for the implementation of recommended energy measures by providing estimated project costs, energy bill savings, available incentives, and financing solutions for the package of measures. The PDP team then prepares and submits an IOU incentive application package to reserve incentives and on-bill financing (OBF) available to the agency if applicable. Other financing options may also be applied for and pursued at this time.

When possible, the audit phase is completed in coordination with applicable program partners, such as IOU Local Government Partnerships and third party programs. Coordination among partners ensures that a robust array of service offerings are provided to the agency, while also improving cost-effectiveness across programs and avoiding duplication of efforts. Other SoCalREN Public Program offerings are also integrated during this phase if applicable.

Design and Procurement: The assigned engineer completes technical performance specifications for the selected measures. If the agency releases a bid for project construction services, the PDP can provide procurement support in the form of supplementary bid package materials and sample language as required. If the agency is utilizing the PDP's simplified procurement method, a joint scope walk is scheduled at the site with the selected pre-qualified contractor, agency representative, and PDP project

team. The contractor provides feedback on the draft technical specifications and, if necessary, revises and finalizes them before a cost proposal is presented to the agency.

Agency Approval: The PDP project manager prepares a detailed project proposal package to assist agency staff with obtaining the necessary approvals for the project, which may include a staff report and draft resolution, scope of work, cost proposal, and any identified utility incentives and/or financing documents. The agency’s relevant elected approval authority approves the project, submits the necessary signed documentation, and issues a purchase order to the contractor for construction services.

Construction: During the construction phase, the agency is the “project owner of record” responsible for all construction contracts and costs, as well as designating a construction manager. The agency may choose to manage the construction on its own, or access simplified construction management services through the Program Partners. The PDP project management team provides construction management support throughout the process, including review of contractor submittals and verification that the work is performed in accordance with the design specifications to ensure the expected energy savings are achieved and incentives are captured.

Completion: Once the project is installed and verified, the PDP team will work with the agency and contractor to collect the information required to submit the appropriate project close-out information to the applicable resource program so the agency can receive incentives and the savings can be accrued for the project. The contractor is responsible for the transfer of all appropriate documentation, knowledge, and training to the agency and the facility management personnel for new installed equipment and/or operational changes. After project completion, the agency receives a survey to provide feedback on the impact of program services utilized to complete the energy efficiency project and how the program can improve.

Capacity Building: Outside of the project development services, enrolled agencies are able to access expertise, resources, shared procurement strategies, best practices, and lessons learned in order to leverage the collective knowledge and expertise of the SoCalREN to better reduce costs and address common barriers. The PDP provides access to resources including project managers, technical advisors, engineering firms, contractors, financial advisory services, utilities, and other industry participants. Regular peer-to-peer sharing is also offered through workshops, newsletters, and other outreach methods.

### **c. Program Design and Best Practices**

*Describe how the program overcomes the market barriers in its market sector and/or end use. Describe why the program approach constitutes "best practices" or reflects "lessons learned." Provide references where available.*

#### **Market Barriers**

The fragmented way in which the energy industry currently delivers services and incentives makes it challenging to achieve deep energy retrofits. This results in multiple barriers to whole building retrofits and a “project delivery gap” for the customer. A key barrier for public agencies is understanding the benefits of implementing energy projects on a comprehensive scale. Further, agencies often lack sufficient in-house expertise and necessary financial resources. These are important challenges to solve because public agencies are significant players in the energy field, both as consumers and as leaders of their communities. The PDP addresses these barriers by providing services to streamline energy

efficiency project implementation with sustained technical assistance, and support in accessing project funding.

### **Best Practices**

To help fill the “project delivery gap” and better enable public agencies to meet key challenges, the PDP has identified several best practices that are integrated into the project delivery process to ensure continued success. The PDP addresses the unique needs of the public agency customer and mitigates the need for agencies to acquire their own in-house expertise and resources. Through a “one stop” approach, the PDP delivers comprehensive energy retrofit services, customizable to the agency’s needs. Participating public agencies can take advantage of the full suite of offerings or select only the services that fit their needs.

The PDP aims for continuous improvement of implementation practices and systems to further improve and enhance the services received by public agencies. Since the PDP’s inception, it has been modified and streamlined to incorporate lessons learned from on the ground experience to design more effective systems for project delivery and implement more efficient tools and techniques. In addition to continuous improvement, there have been significant efforts to improve upon cost-effectiveness. Program strategies are evaluated and developed to control costs and ensure that the most efficient methods are deployed for project implementation. Examples of cost-effective program strategies include:

- A Project Budget Tool that ensures appropriate allocation of program resources based on project and agency characteristics
- Development of a streamlined pathway for engineers to enter project budgets for approval to ensure alignment on project scope and deliverables
- Project Commitment forms integrated into the program process to confirm agency buy-in more frequently as a project progresses and to ensure that PDP resources are carefully managed and delivered

Furthermore, the PDP has incorporated the following best practices into the program design:

- Regional Partner Agency Engagement: Through regional partners, agencies across diverse climate zones, population sizes, population densities, and other demographic characteristics are targeted for engagement in order to ensure comprehensive service to the Southern California region, including services to disadvantaged communities. In 2019, SoCalREN partners began partnering with regional community based organizations and Council of Governments (COGs) to provide on-the-ground outreach and engagement to promote and enhance program services. Many of these organizations have established relationships with agencies working on energy efficiency efforts and have or continue to support agencies as were previous implementers of IOU Local Government Partnerships. The regional partner approach brings SoCalREN to increased enrollment opportunities, peer-to-peer sharing, and an increased number of energy projects, while customizing services to meet regional needs. Regional partners enhance SoCalREN’s expertise and reach by leveraging their local knowledge, existing relationships with member agencies, and professional relationships that often extend beyond energy efficiency.
- Utility Coordination and Stakeholder Collaboration: The PDP promotes early and ongoing cooperation and collaboration with utility partners and stakeholders based on an agreed upon protocol. Coordination among partners ensures that a robust array of service offerings are provided to the agency, while also improving cost-effectiveness across programs and avoiding

duplication of efforts. A collaborative approach also improves the customer’s experience and helps avoid confusion between programs.

- **Standardized Tools and Templates:** A critical element to the PDP design is the continuous development and implementation of standardized tools and templates, including a comprehensive Project Delivery Manual (PDM). The PDM guides project managers and engineers to ensure quality control and application of best practices through the project delivery process.
- **Procurement Assistance:** Assistance during the procurement process enables public agencies to move projects into the construction phase sooner and ensures the achievement and persistence of expected energy savings. The PDP also offers access to a pool of highly-qualified specialty contractors that have been selected through a competitive process, further driving down project costs.
- **Financing Support:** To overcome the significant hurdle of project funding, the project team helps identify and secure grant funding and project financing. The PDP helps agencies access and apply for a variety of funding and financing sources that include, but are not limited to, Energy Lease Financing (ELF), IOU on-bill financing (OBF), the California Energy Commission (CEC) low interest loan program, local self-funded financing opportunities, and the SoCalREN’s Revolving Loan Fund (RLF). Enrolled agencies also have access to a financial advisor for additional expertise on an as needed basis.
- **Marketing and Communications:** Successful marketing and communications strategies are leveraged to drive program activities and enrollment.
- **Evaluation and Reporting:** The PDP completes ongoing evaluation to ensure the goals and targets are met while keeping stakeholders fully informed of PDP operations and outcomes.
- **Workforce Development:** The PDP supports workforce development initiatives by measuring and reporting on job creation metrics that drive the local economy.
- **Outreach to Disadvantaged Communities:** The PDP has identified and enrolled agencies serving disadvantaged communities, providing them with specialized services and deliverables. As of April 2019, almost 60% of enrolled cities represent disadvantaged communities.
- **Customer Satisfaction:** The PDP continues to monitor customer feedback to identify program enhancements and ensure the highest level of customer satisfaction is achieved. Since the PDP’s inception, annual customer satisfaction ratings are consistently 90% or higher.
- **Peer-to-Peer Learning:** The PDP seeks to build agency capacity and expertise in energy efficiency by providing agencies with customized tools and resources that they would otherwise have to develop on their own, thereby saving time, money, and staff resources. The PDP also shares the strategies and best practices used by its agencies to overcome common barriers with other enrolled agencies by hosting webinars and presenting at conferences and workshops.

**d. Evaluation, Measurement, and Verification (EM&V):**

*Describe any process evaluation or other evaluation efforts that the PA will undertake. Identify the evaluation needs that the PA must build into the program. These might include:*

- *Data collection strategies embedded in the design of the program or intervention to ensure ease of reporting and near term feedback, and/or*
- *Internal performance analysis during deployment.*

The PDP is a non-resource program that funnels energy savings through existing resource programs. As such, EM&V for the program focuses on both customer energy savings claimed by the IOUs as well as program performance metrics for services offered in alignment with the CPUC’s California Long Term Energy Efficiency Strategic Plan<sup>5</sup>. For data related to energy savings projects, the PDP works in close coordination with the IOUs to collect project measure data on a monthly basis through a data transfer process.

The PDP offers technical assistance by conducting audits for the facilities and assets it services, which include estimated energy savings and a list of measures. Energy savings are determined by calculating the energy consumption of the system or facility before (referred to as the “baseline” period) and forecasting savings after the measures are implemented, adjusted for any differences, such as operating and weather conditions. Additionally, behavioral, retro-commissioning, and operational (BRO) strategies may utilize a measured existing conditions baseline, and may require additional energy model or simulation data. Depending on the measure type, some calculations must use the most recent California Code of Regulations Title 24 (T24) Energy Efficiency Building Standards or Standard Practice for baseline operating conditions.

The Measurement and Verification (M&V) process built into PDP procedures is in accordance with IOU downstream intervention program requirements and follows M&V standards as required by the resource program through which the project is implemented. For example, per the SCE Customized Calculation Savings Guidelines v. 22.0<sup>6</sup>, a full M&V plan is required for most custom projects with more than 250,000 kWh in savings, though custom projects with less than 250,000 kWh in savings may also require an M&V plan. If a full M&V plan is required for a project, it will be provided by the assigned engineer during development of the Project Feasibility Study. The full M&V plan is approved by SCE, or a third party technical reviewer representing SCE, and includes the minimum required M&V data for the baseline and/or measure equipment and system performance.

The M&V plan methodology is based on the principles, procedures, and guidelines set forth in the International Performance Measurement and Verification Protocol (IPMVP) Options A-D<sup>7</sup>, and the Federal Energy Management Program (FEMP) M&V Guidelines<sup>8</sup>. The full M&V plan can be used as the basis for project verification. The project M&V plan is submitted as an attachment to the Project Feasibility Study at the time of application submission, and attached to the Installation Report after project implementation.

In addition to funneling projects through utility programs, the PDP also delivers non-resource benefits to the public sector. The following describes the approaches and data that is collected in support of continuous improvement and ongoing program evaluation.

The SoCalREN customer relationship database (CRM) is used to record most program and project related information and to generate reports that indicate progress toward program goals. In addition, the PDP seeks feedback from its customers with a project specific survey after each project closeout, via focus groups and through an annual agency survey. Focus group feedback and survey results are analyzed to

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<sup>5</sup> California Energy Efficiency Strategic Plan, <http://www.cpuc.ca.gov/general.aspx?id=4125>

<sup>6</sup> SCE Customized Calculation Savings Guidelines for Non Residential Programs v. 22.0, <https://sceonlineapp.com/DocCounter.aspx?did=670>

<sup>7</sup> International Performance Measurement and Verification Protocol, [http://www.eepperformance.org/uploads/8/6/5/0/8650231/ipmvp\\_volume\\_i\\_2012.pdf](http://www.eepperformance.org/uploads/8/6/5/0/8650231/ipmvp_volume_i_2012.pdf)

<sup>8</sup> Federal Energy Management Program (FEMP) M&V Guidelines, <https://www.energy.gov/eere/femp/downloads/mv-guidelines-measurement-and-verification-performance-based-contracts-version>

understand the impact program services have on energy efficiency projects and how the program can improve. Through data collected in the CRM and analysis of survey feedback, as complements to the ongoing customer service by the agency’s dedicated project manager, the PDP has the capacity to evaluate its effectiveness and ability to deliver energy savings, build agency knowledge and capacity, conduct outreach activities, meet greenhouse gas (GHG) reduction targets, create jobs, and streamline processes and procedures. The PDP ensures customer satisfaction and effectiveness in the delivery of its services by taking a nimble and highly adaptive approach to program implementation.

#### e. Program Performance Metrics<sup>9</sup>

*Describe the program performance metrics. (metric, measurement method, frequency, etc)*

The PDP is proposing the following key performance metrics to be tracked and reported on periodically throughout the program cycle.

No	Metric	Method	Frequency
1	1st Year Gross kWh Savings Claimed	Savings submitted to CPUC through funneled resource programs	Annually
2	1st Year Gross kW Savings Claimed	Savings submitted to CPUC through funneled resource programs	Annually
3	1st Year Gross Therm Savings Claimed	Savings submitted to CPUC through funneled resource programs	Annually
4	Agency Enrollment	Number of agencies enrolled in SoCalREN PDP	Annually
5	Increased Pipeline	Energy savings identified through completed audits to be installed in future years	Annually
7	Program Savings Contribution to Market Share	Overall contributions of energy savings to IOU programs as measured by percentage of overall Public Sector savings	Annually
8	Job Creation	Number of new construction jobs as measured by construction costs	Annually

<sup>9</sup> IP Guidance from D.15-10-028: "It is in the implementation plans that we want to see at least one metric for each program/strategy/sub-sector/intervention strategy; more than one where appropriate.... Implementation plans will contain metrics, as already discussed. PAs are free to start with a clean slate in developing metrics and associated reporting requirements, but for all programs will continue to provide monthly cost reports, and for resource programs will provide monthly savings data as well."

9	Capacity & Expertise	Number of informational outreach activities conducted by SoCalREN	Annually
10	Customized Services	Reporting of services leveraged as a percentage of completed projects	Annually
11	Educational Material	Number of fact sheets, newsletters, and case studies generated by the SoCalREN program	Annually
12	Customer Satisfaction	Enrolled agency satisfaction rating as reported in annual program survey	Annually
13	Completed Projects in Disadvantaged Communities	Percent of projects completed in disadvantaged communities	Annually
14	Regional Environmental Benefits	Metric tons of greenhouse gas (GHG) emissions reduced regionally as measured by lifetime gross energy savings of completed EE projects	Annually

The necessary project information will be gathered through a series of discussions and verification checks with each public agency customer. The PDP CRM database system will be used to track information about the customer, project, energy savings claimed and other details that will help show the impact of this program. This will be done on a quarterly basis and more frequently as needed. Once the information is gathered, it will be entered in the database and then used to generate reports. Savings will support overall SoCalREN public sector goals.

**f. Quantitative Program Targets**

*Provide estimated quantitative information on the number of projects, companies, non-incentive customer services and/or incentives that the program aims to deliver and/or complete annually. Provide references where available.*

Year	(1st Year Gross) kWh Savings Claimed	(1st Year Gross) kW Savings Claimed	(1st Year Gross) Therm Savings Claimed
2020	10,000,000	500	18,000
2021-2023*	11,666,666	350	23,333
2024-2025**	12,000,000	540	24,000

\* Mid-term targets are an average of 2021, 2022, and 2023 targets

\*\* Long-term targets are an average of 2024 and 2025 targets

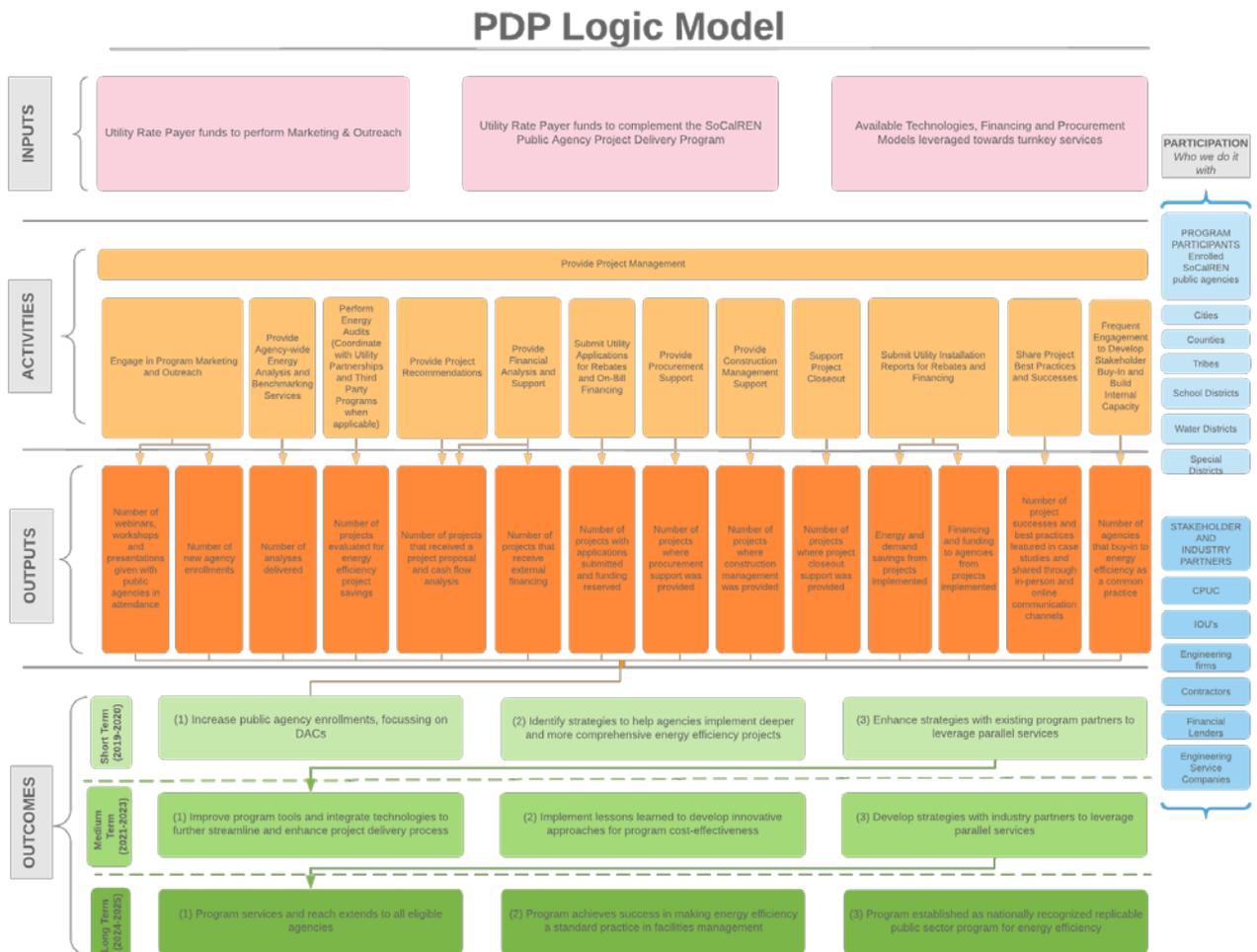
**g. Pilots**

Please describe any pilot projects that are part of this program and explain what makes them innovative. The inclusion of this description should not replace the Ideation Process requirements currently agreed upon by the California Public Utilities Commission (CPUC or "Commission") staff and Investor Owned Utilities (IOUs). The Ideation Process is still undergoing refinements and will be further discussed as part of Phase III of this proceeding.

This section is not applicable.

**h. Program Logic Model**

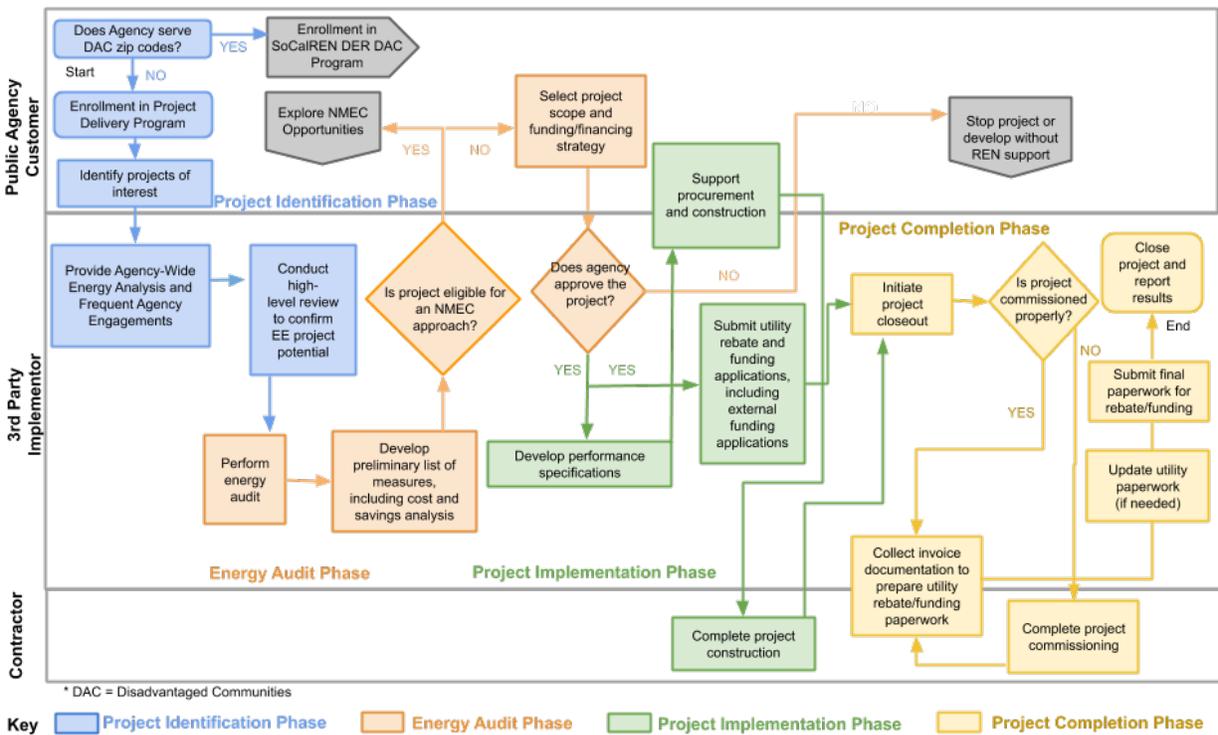
Model should visually explain the underlying theory supporting the sub-program intervention approach, referring as needed to the relevant literature (for example: past evaluations, best practices documents, journal articles, books, etc.)



**i. Process Flow Chart**

Provide a sub-program process flow chart that describes the administrative and procedural components of the sub-program. For example, the flow chart might describe:

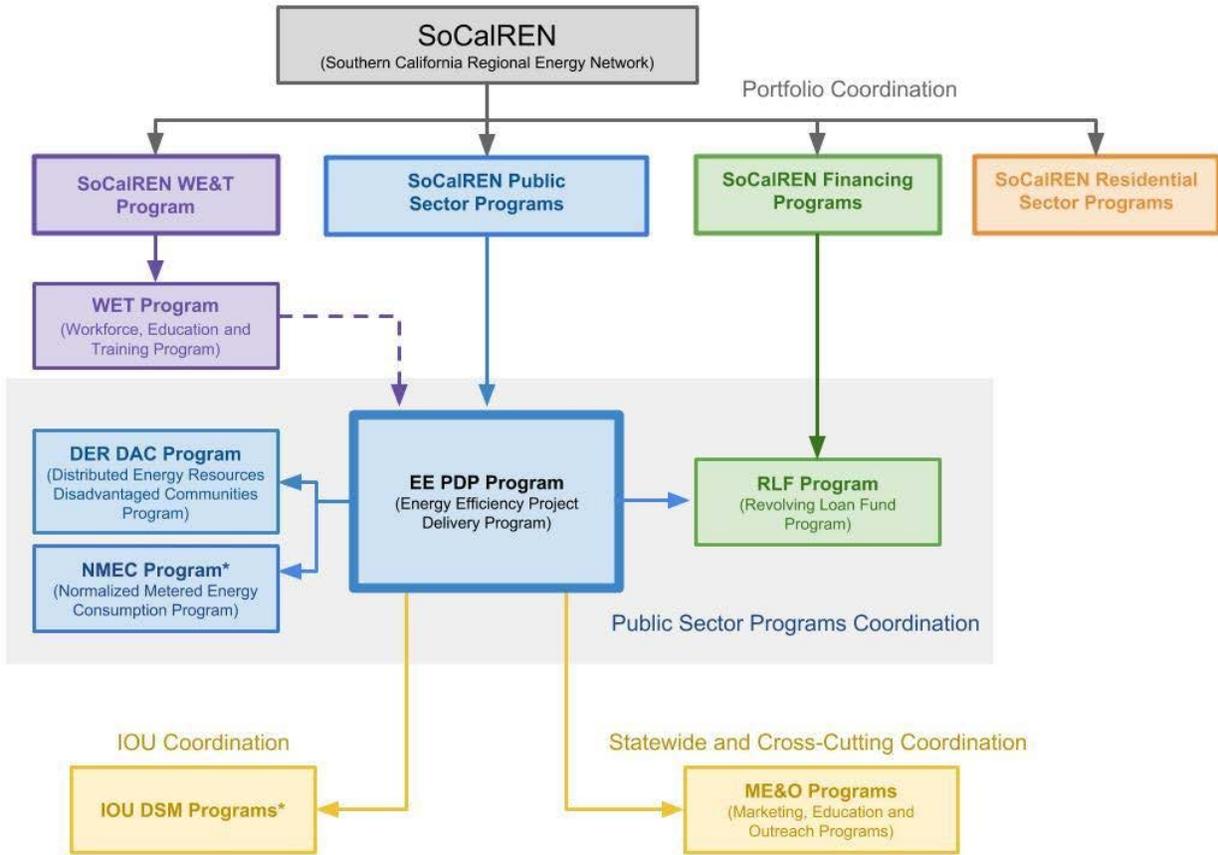
- A customer’s submittal of an application
- The screening of the application
- The approval and/or disapproval of an application
- Verification of purchase or installation
- The processing of incentive payments, and
- Any quality control activities.



**j. Diagram of Program**

Please provide a one page diagram of the program including subprograms. This should visually illustrate the program/sub-program linkages to areas such as:

- Statewide and individual IOU marketing and outreach
- Workforce, Education and Training (WE&T) programs
- Emerging Technologies (ET) and Codes and Standards (C&S)
- Coordinated approaches across IOUs, and
- Integrated efforts across Demand Side Management (DSM) programs.



*\*Resource Programs*

**k. Additional information**

*Include additional information as required by Commission decision or ruling. As applicable, indicate the decision or ruling, with page numbers.*

This section is not applicable.

**1. For Market Transformation Programs Only<sup>10</sup>**

**i. Quantitative Baseline and Market Transformation Information**

*Provide quantitative information describing the current EE program baseline information (and/or other relevant baseline information) for the market segment and major sub-segments, as available.*

This section is not applicable.

**ii. Market Transformation Strategy**

*Provide a market characterization and assessment of the relationships and/or dynamics among market actors, including identification of the key barriers and opportunities to advance DSM technologies and strategies. Describe the proposed intervention(s) and its/their intended results, and specify which barriers the intervention is intended to address.*

This section is not applicable

**3. Appendix: Supporting Information and Documents**

**a. Program Manuals and Program Rules**

*All programs must have manuals (brochures) for implementers and customers to clarify the eligibility requirements and rules of the program. At minimum, manuals should include:*

A short description of supporting materials is provided below. Greater detail will be provided in the program manual.

**Table 1. Supportive Materials Index**

#	Information Required	Short Description
1	<b>Eligible Measures or measure eligibility</b>	<i>A list of eligible measures, or measure eligibility requirements</i>  Eligible measures pursued by public agencies through the program will adhere to the rules set forth by SCE and SCG regarding measure eligibility. All savings will be transparent in supporting calculations as submitted to the IOUs.
2	<b>Customer Eligibility Requirements</b>	<i>Requirements for program participation (for example, annual energy use or peak kW demand)</i>

<sup>10</sup> Codes & Standards program, Emerging Technologies program, Workforce Education & Training program, etc.

		The PDP will work with eligible customers in the public sector. This includes cities, counties, school districts, tribes and special districts serviced by SCE and/or SCG that pay PPP charges.
<b>3</b>	<b>Contractor Eligibility Requirements</b>	<p><i>List of any contractor (and/or developer, manufacturer, retailer or other "participant") eligibility requirements. (For example: specific IOU-required trainings, specific contractor accreditations, and/or specific technician certifications.)</i></p> <p>The PDP will work with the agency selected contractor to ensure all incentive eligibility requirements are addressed and met.</p>
<b>4</b>	<b>Participating Contractors, Manufacturers, Retailers, Distributors</b>	<p><i>Information as to whether:</i></p> <ul style="list-style-type: none"> <li>● <i>Program or sub-program delivery channel is downstream, midstream, or upstream, and</i></li> <li>● <i>Program is an incentive and/or buy-down type program.</i></li> </ul> <p>This is a downstream program offering project development and project implementation services, with post-installation incentives offered through IOU resource programs.</p>
<b>5</b>	<b>Additional Services</b>	<p><i>Descriptions of any additional sub-program delivery, measure installation, marketing &amp; outreach, training, and/or other services provided, if not yet described above.</i></p> <p>The PDP will offer education outreach to public sector customers in SCE and SCG territories. This educational outreach will include information on the benefits associated with utility based energy saving measures.</p>
<b>6</b>	<b>Audits</b>	<p><i>Information as to whether:</i></p> <ul style="list-style-type: none"> <li>● <i>Pre- and post-audits are required</i></li> <li>● <i>Funding or incentive levels have been set for audits, and</i></li> <li>● <i>The eligibility requirements for audit incentives.</i></li> </ul> <p>Pre and post installation audits will be conducted in a manner that aligns with SCE and SCG incentive eligibility requirements.</p>
<b>7</b>	<b>Sub-Program Quality Assurance Provisions</b>	<p><i>List of quality assurance and quality control requirements, including accreditations and/or certifications or other credentials of individuals or organizations performing this work.</i></p> <p>Quality assurance checks will be implemented throughout the process at various milestones to maintain data accuracy and customer satisfaction.</p>

**b. Incentive Tables, Workpapers, Software Tools**

*Provide a summary table of measures and incentive levels, along with links to the associated workpapers.*

All EE measures will funnel through existing EE resource programs. The below table describes other tools leveraged to support turnkey project delivery services.

#	Tools	Short Description
1	Salesforce	Customer Relationship Management (CRM), used to track projects and generate customer reports.
2	Compass	Platform used to collect and synthesize energy consumption data and deliver customer energy use analyses
3	Energy Star Portfolio Manager	Online tool used to track energy consumption and greenhouse gas emissions. Allows user to benchmark the performance of one building or a whole portfolio of buildings.
4	GIS	Geographic Information System (GIS) tool allows users to pinpoint exact locations of facilities and tie usage characteristics to those facilities.
5	ezIQ	Provides access to competitively awarded contractors through cooperative purchasing networks, expediting project delivery through a simplified procurement process.