

## Appendix A: Implementation Plan Template (2.0)

The following Implementation Plan is located on the CPUC-maintained website, the California Energy Data and Reporting System (“CEDARS”)<sup>1</sup>, in accordance with applicable CPUC decisions and Energy Division guidance.

### Program Overview

The Small and Medium Public Energy Efficiency (“EE”) Program (“Program”), will provide direct install services to Southern California Gas Company’s (“SoCalGas”) very small, small, and medium public customer facilities.

### Program Budget and Savings

**1. Program and/or Sub-Program Name**

Public Direct Install Program

**2. Program / Sub-Program**

ID SCG3846

**3. Program / Sub-program Budget Table**

<b>Cost Category</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>Total</b>	<b>% of Total Budget</b>
Administration	\$60,000	\$60,000	\$60,000	\$180,000	3%
Marketing	\$60,000	\$60,000	\$60,000	\$180,000	3%
Direct Implementation - Non-Incentive	\$240,000	\$240,000	\$240,000	\$720,000	12%
Direct Implementation – Incentive	\$1,640,000	\$1,640,000	\$1,640,000	\$4,920,000	82%
<b>Total Budget</b>	<b>\$2,000,000</b>	<b>\$2,000,000</b>	<b>\$2,000,000</b>	<b>\$6,000,000</b>	<b>100%</b>

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<sup>1</sup> California Energy Data and Reporting System (CEDARS), <https://cedars.sound-data.com/>

**4. Program / Sub-program Gross Impacts Table**

	2021	2022	2023	Total
Gross Therm Savings	1,249,030	1,249,030	1,249,030	3,747,090
Net Therm Savings	764,904	764,904	764,904	2,294,712
Gross kWh Savings	0	0	0	0
Net kWh Savings	0	0	0	0
Gross kW Reduction	0	0	0	0
Net kW Reduction	0	0	0	0
Gross Gallons Saved	79,510,255	79,510,255	79,510,255	238,530,765
Net Gallons Saved	79,510,255	79,510,255	79,510,255	238,530,765
Non-resource Deliverable(s), (Audits and Sales Consultations)	150	150	150	450
Assumed Program Launch Date	February 1, 2021			

**5. Program / Sub-Program Cost Effectiveness (“TRC”)**

1.87

**6. Program / Sub-Program Cost Effectiveness (“PAC”)**

2.49

**7. Type of Program / Sub-Program Implementer (PA-delivered, third party-delivered or Partnership)**

Third Party-Delivered

**8. Market Sector(s)**

Public - Very small, small, and medium local government, federal government, and education (K-12) facilities.

**9. Program / Sub-program Type**

Resource

**10. Market channel(s) Downstream and Intervention Strategies**

Direct install and incentive with financing options

**Implementation Plan Narrative**

**1. Program Description:**

The SoCalGas Public Direct Install Program (PDIP) is a turnkey cost-effective end-to-end solution for SoCalGas that serves very small, small, and medium local government, federal government, and education (K-12) facilities. In addition to no cost direct install technologies, the program offers advanced energy efficiency improvements that can be financed.

## **2. Program Delivery and Customer Services:**

The Public Direct Install Program will deliver the program and customer services following the 3-step process outlined below:

**STEP 1:** Along with intelligent outreach, energy advisors attend local government partnership meetings to present the program and meet municipality representatives. Energy advisors also meet municipality representatives and public entities on an ongoing basis by attending workshops and forums.

**STEP 2:** Energy advisors present the program to the customer sites' decision makers. They also work with the project sites' maintenance staff to assess locations for feasible measure installation. If feasible measures are determined, a PDIP technician schedules a follow-up visit to install program measures.

**STEP 3:** The program accurately records and reports Hard-to-Reach program participants allowing the program to claim the higher net-to-gross ratio of 0.85 where applicable. Synergy also targets Disadvantaged communities allowing for more customers to potentially be classified as Hard-to-Reach. With this strategic focus, the 0.85 net-to-gross ratio can be claimed for an estimated 40% of customers thus boosting the program's net energy savings and TRC.

## **3. Program Design and Best Practices:**

### **Intelligent Customer Targeting, Outreach, and Engagement.**

In accordance with SB 535, the program targets disadvantaged communities throughout SoCalGas's service territory. The SB 535 mapping tool found on the OEHHA CalEnviro Screen website is used to identify the disadvantaged communities for program outreach and education. A program outreach worker utilizes an iPad to geofence the disadvantaged communities and focuses on promoting PDIP face-to-face, by phone, or email to set up meetings to present the program in person or via webinar. Non-residential public marketing lists are created to prepare for strategic outreach efforts that include the distribution of flyers by program energy specialists. Disadvantaged communities (DAC) are identified for DAC outreach intensification.

A similar approach is used for program delivery in the non-DAC areas. The delivery approach begins with intelligent outreach to potential program participants that are in the public market segments (i.e., K-12 Schools, Correctional Facilities, Fire Protection, and Police Protection) utilizing iPad mapping tools and publicly available information (address, phone #, and email).

## Technical Assistance.

Areas of Technical Assistance	Description
Warranty Coverage	No-hassle 1-year warranty on labor and 3-year warranty on material to be free from manufacturer defects.
Conditions that may Void Coverage	The Synergy warranty inspector reviews all seemingly unreasonable claims and makes a judgment on a case-by-case basis.
Retrieval of Damaged and/or Defective Merchandise	Synergy retrieves all damaged and defective merchandise from the premises where installed. This is not the customer's responsibility.
Effective Date of Warranty	Date of installation
Warranty Period Tracking	Customer installation dates are recorded and accessible to customer service technicians through the Synergy Database for reference.
Manufacturer Unit Tracking	Bill of sale or bill of lading for each Synergy order is used for manufacturer unit tracking.
Normal Business Hours for Warranty Calls and Service	Monday - Friday 8AM - 5PM Emergency: Monday – Sunday 24 Hours
Contact Information for Warranty Questions and Service	Phone: 800-818-4298 Web: <a href="http://www.synergycompanies.org">www.synergycompanies.org</a>
Warranty Process	Program customer reaches Synergy's Technical Service Department through phone or web inquiry. The Technical Service Department representative retrieves the customer's information in the Synergy database. An appointment is scheduled for warranty service as soon as possible with an assigned Synergy technician in the field. Each record in the Synergy database is assigned a specific program. This feature allows for differentiation between programs facilitating faster customer service, program specific reports, and invoicing.
The Typical Response Time for Warranty Calls and Service for Measures that are not Operational or not Functioning Properly	No matter how big or how small the warranty call or service required, Synergy resolves all issues as soon as possible. Most issues are resolved the same day or 24 hours after reported. Non-emergency weekend calls are handled the first business day following the weekend. Synergy holidays are New Year's Day, Memorial Day, 4 <sup>th</sup> of July, Labor Day, Thanksgiving Day, and Christmas Day. During holidays, only the emergency service calls are attended to. The message for emergency service

	responds on all the telephone lines after hours, weekends, and holidays.
The Determining Factors for Repairing or Replacing Defective Equipment	The number one factor is customer satisfaction. Synergy aims to make customers happy. The second factor is the warranty period.
Who will Make the Necessary Service Repairs or Replacement?	Synergy Quality Production Managers who specialize in the quality and productivity of Synergy technicians. The original technician who performed the work may also be assigned for the warranty service call depending on the nature of the service call.
Available locations for pick-up of replacement parts for defective equipment	1325 N Red Gum St, Anaheim, CA 92806 5670 E. Clinton Avenue, Fresno, CA 93727 90 Business Park Drive, Perris, CA 92571
How will the warranty coverage and process be managed after the contract ends?	Synergy will continue to stand behind products and services installed after the contract ends for the duration of the warranty period of each customer.

**Customer Incentives.**

The program offers no-cost direct installation measures as well as rebate incentives for comprehensive measures that require customer co-payment.

**Direct Install.**

Contractor will directly install energy savings measures after in-field energy assessments.

**Financing.**

Non-residential public customers may acquire their own financing through their lending institution of choice or qualify for SoCalGas On-Bill Financing.

**4. Innovation:**

The Public Direct Install Program provides a cost-effective, feasible, and innovative clear path to achieving the California Long-Term EE Strategic Plan (CLSTEPP) that requires 50 percent of existing buildings to be zero net energy by 2030 all while targeting DAC communities and public accounts in Hard-to-Reach zip codes. The program is water resource ready to achieve statewide water energy nexus goals through the installation of high efficiency water conservation products.

**5. Metrics:**

#	KPI	SoCalGas Metric	KPI Definition
1	Energy Savings Delivered	Energy Savings	To date % achieved of energy savings goal compared to planned goal, split on an even pro rata basis
2	Project Installations Delivered	Installations	To date % achieved of quarterly and annual number of projects goal
3	Penetration of energy efficiency programs in the eligible market	Conversion to Comprehensive Energy Efficiency Projects	The to date % of Comprehensive Projects compared to total projects
4	Goals/ Expenditure Alignment	N/A	To date % of energy savings goal / to date % of overall budget split on an even pro rata basis
5	Hard-to-Reach and Disadvantaged Communities	Penetration of EE	Percentage of customers in disadvantaged communities
6	Diverse Business Enterprise Spend	N/A	To date % DBE spend compared to DBE commitment, split on an even pro rata basis. Synergy's committed to spend 42% with DBEs
7	Program Administration and Implementation	N/A	Based on Contractor's reporting/data quality, timeliness, invoicing issues, meeting expectations
8	Average Savings Per Project	Depth of Intervention	Net lifecycle energy savings per project
9	Cost Effectiveness Alignment	N/A	Actual TRC Ratio Compared to Pre-Program Approved TRC Ratio (and "Continuous Monitoring Mechanism" is Yearly)
10	Levelized PAC Cost	Cost Per Unit Saved	Actual compared to Forecasted levelized PAC cost

**6. For Programs claiming to-code savings:**

The Public Direct Install Program claims savings above code standards.

**7. Pilots:**

The Public Direct Install Program has no pilots planned; however, it is open to pilots in the future and the implementation plan would be updated accordingly.

**8. Workforce Education and Training:<sup>2</sup>**

The workforce assigned to the Public Direct Install Program will be enrolled in education and training courses held by SoCalGas virtually or at the Energy Resource Center. The program will expand/initiate partnerships with entities that do job training and placement.

**9. Workforce Standards:**

Implementation of the Public Direct Install Program requires a CSLB license with B – General, C2 – Insulation, C10 – Electrical, C17 – Glazing, C20 – HVAC, C22 - Asbestos, and C36 – Plumbing certifications to implement the program’s scope. The program also requires that the implementer carry at least a B grade with ISNET world.

State law and the Contractors State License Board require all Bidders and their subcontractors to hold valid contractor's licenses prior to submitting an abstract or a proposal for work that is subject to license requirements (California Business and Profession Code, Sections 7026, 7027.1, and 7028(a)). The implementer complies fully with these requirements holding all the licenses necessary to perform the quality installation of all direct install and advanced energy efficiency technologies.

**10. Disadvantaged Worker Plan:<sup>3</sup>**

The program supports job access for disadvantaged workers by interviewing individuals in the circumstance defined as a "disadvantaged worker" and providing an equal employment opportunity for the position desired. The implementer currently employs workers that meet these criteria.

The program provides disadvantaged workers with administrative, marketing, and technician opportunities in the day to day operation of the program. These positions include scheduling, application processing, outreach, sales, and installation tasks. With the passage of time and performance reviews, the program provides management and executive level opportunities to disadvantaged workers.

The implementer has Human Resources software that tracks the progress of all employees and can distinguish which employees were onboarded as disadvantaged workers. This information can be reported as needed.

**11. Additional information:**

No additional information.

[Supporting Documents](#)

**1. Program Manuals and Program Rules:**

See Below

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<sup>2</sup> D.18-05-041, page 20-21 and Ordering Paragraph 7

<sup>3</sup> D.18-10-008, Attachment B, Section D, page B-9.

## 2. Program Theory<sup>4</sup> and Program Logic Model:<sup>5</sup>

### **Introduction**

Non-residential public ratepayers have goals and plans to be more energy efficient and even achieve advanced energy efficiency, however with so many choices and options it is difficult to decide the best path forward. The Public Direct Install Program is the place for non-residential public ratepayers to begin their advanced energy efficiency journey. PDIP provides interested non-residential public customers complimentary audits, no-cost direct install energy efficiency technologies, and advanced energy efficiency technologies that can be financed.

### **How the Offering Works**

The path to comprehensive energy efficiency begins by scheduling an appointment for the installation of no-cost approved water heating technologies that excite program participants about saving energy and advanced energy efficiency. During or at the conclusion of the no-cost energy efficiency measures installation appointment, the program participants are invited to participate in a complimentary ASHRAE Level 1 audit and sales consultation to identify opportunities for even greater energy efficiency savings and building performance that can be financed. The audit findings are reviewed with the non-residential public customer to develop an advanced energy efficiency roadmap and determine the next steps.

### **Enrollment**

Eligible non-residential public customers are enrolled in the SoCalGas Public Direct Install Program by the program energy specialist. The information required to enroll is basic contact information, address, and account number.

### **Marketing Plan**

The purpose of the SoCalGas Public Direct Install Program marketing plan is to overcome market barriers and take non-residential public customers down the path of advanced energy efficiency all while delivering a cost-effective direct install resource program.

### **Marketing Materials**

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<sup>4</sup> The expected causal relationships between program goals and program activities in a way that allows the reader to understand why the proposed program activities are expected to result in the accomplishment of the program goals. A well-developed program theory can (and should) also describe the barriers that will be overcome in order to accomplish the goals and clearly describe how the program activities are expected to overcome those barriers. California Evaluation Framework, June 2004.

<sup>5</sup> The graphical representation of the program theory showing the flow between activities, their outputs, and subsequent short-term, intermediate, and long-term outcomes. California Evaluation Framework, June 2004.

Program flyers are the primary printed marketing piece containing program information and the SoCalGas logo lending credence to the effort. The program flyer features information about advanced energy efficiency with direct install information enrollment information.

SoCalGas Public Direct Install Program branded presentation and email template are used to virtually market the program.

The SoCalGas Public Direct Install Program web page has the program's vision, images that support the door hanger in the field, advanced energy efficiency offerings, and direct install measure specifications.

### **Hard-to-Reach Effectiveness**

Synergy will focus on HTR customers that follow the guidance provided in section 2.5.2 of D.18-05-041.

### **Disadvantaged Communities Effectiveness**

In accordance with SB 535, the program targets disadvantaged communities throughout SoCalGas's service territory. The SB 535 mapping tool found on the OEHHA CalEnviro Screen website is used to identify the disadvantaged communities for program outreach and education. Program outreachers utilize iPads to geo-map the disadvantaged communities and target customers face-to-face, by phone, or email to explain the benefits of energy efficiency, advanced energy efficiency technologies, and enrollment in PDIP.

### **Approaches to Energy Efficient Buildings**

The approaches to energy efficient buildings consist of direct install, ASHRAE Level 1 Audits, and advanced energy efficiency. The tailored approach also plays an important role for future measure development and energy savings preservation to achieve energy efficient buildings.

### **Direct Install**

All program participants enter the pathway to advanced energy efficiency through the direct install channel. The no-cost direct install technologies include approved water heating technologies.

### **Advanced Energy Efficiency**

Advanced HVAC and water heating technologies that are ENERGY STAR<sup>®</sup> certified are installed following applicable workforce standards as well as local and state regulations and guidelines.

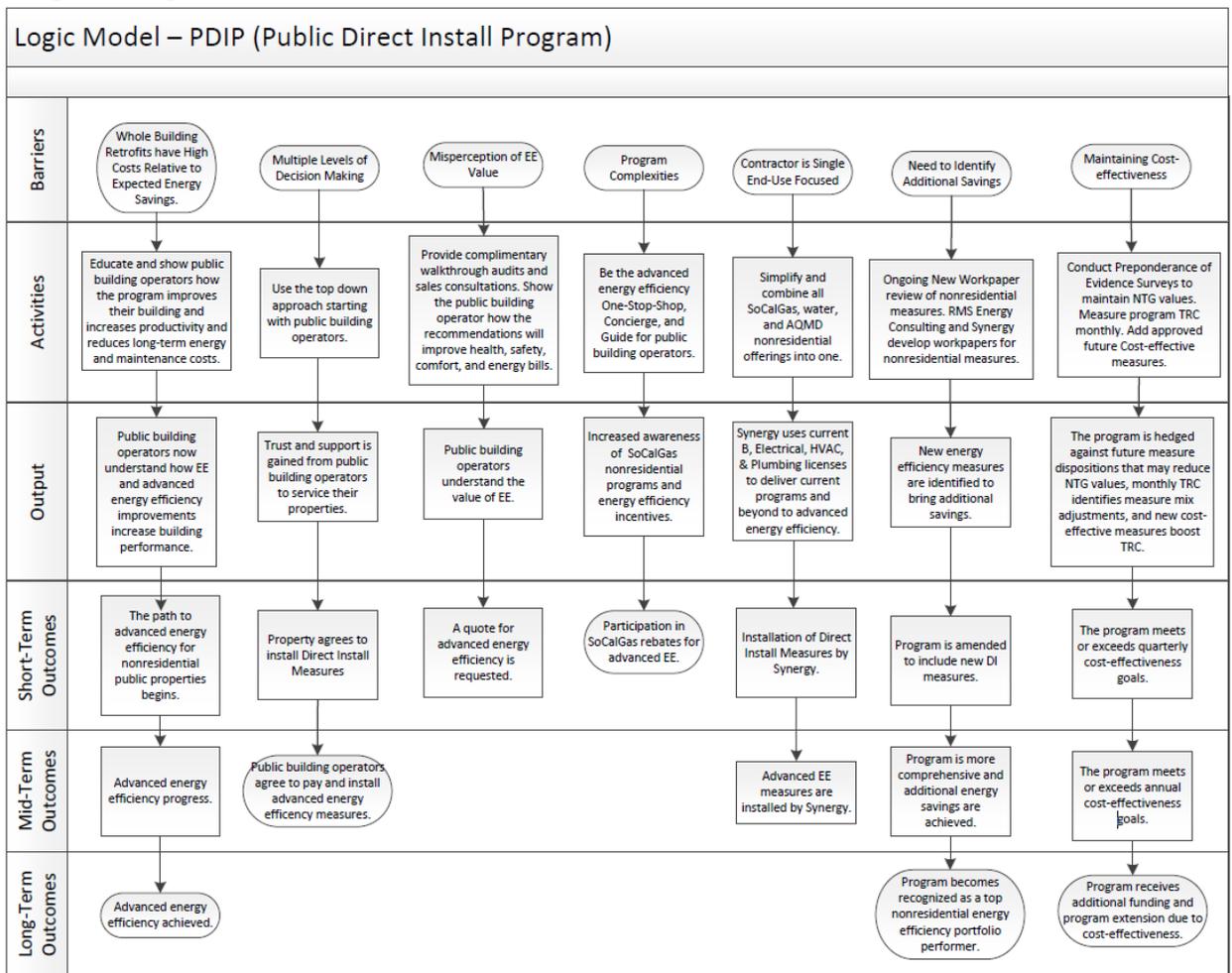
### **Workpaper Development and Workpaper Updates**

Workpaper development and workpaper updates to future existing measures are part of the program design to introduce new technologies to the program in the future and potentially increase energy savings of existing program measures.

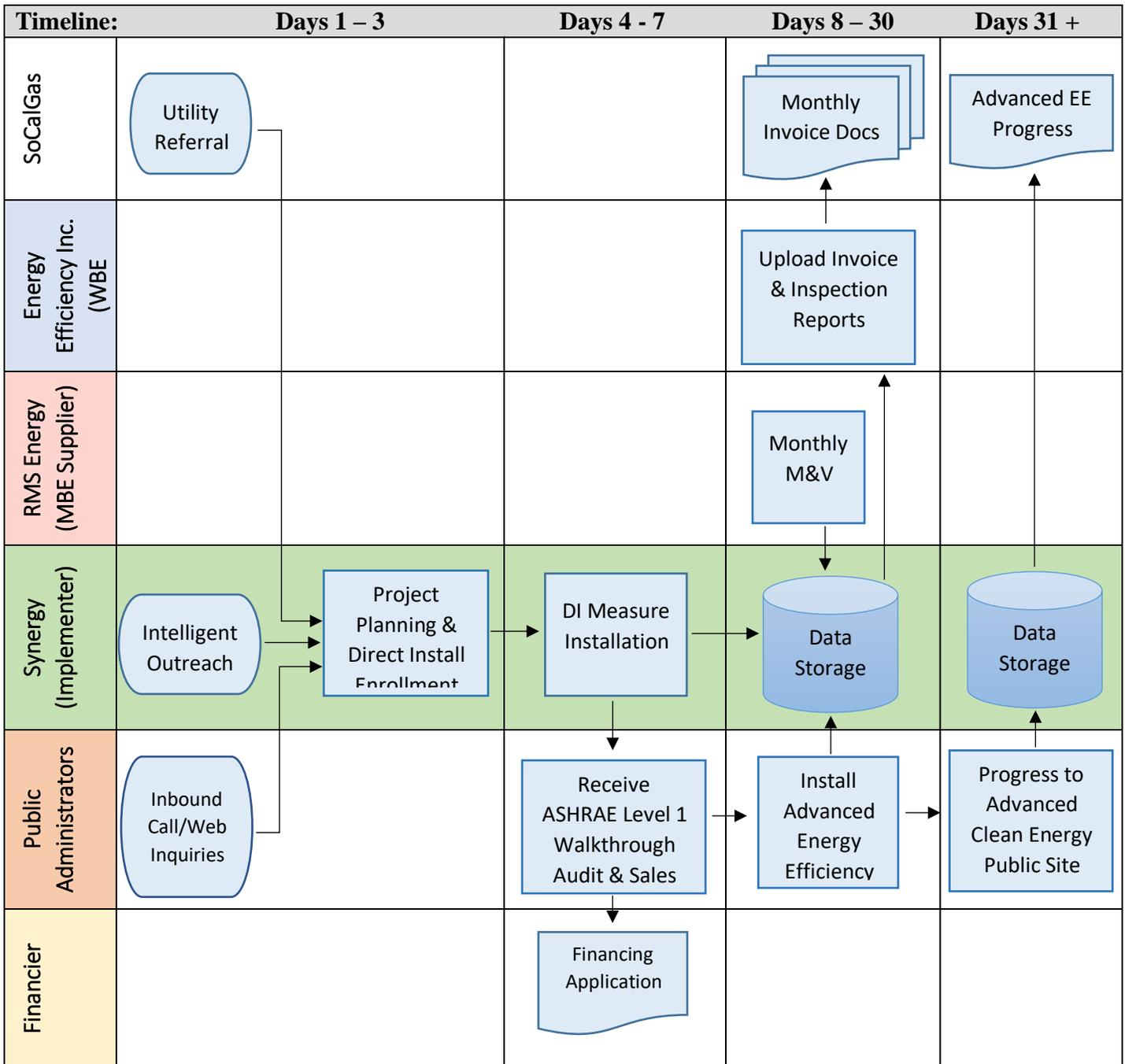
Workpaper development begins when a new measure is identified as potentially having high energy savings. These opportunities are identified as equipment suppliers share their latest technologies that do not have workpapers and as the program walkthrough audits identify areas of non-residential public buildings that could benefit from an energy efficiency solution that currently does not have a workpaper.

Workpaper updates are identified when existing values do not appear to be consistent with field application. For example, when the effective useful life or installation rate of a measure appears to be much lower than what is actually taking place in the field, a field study is performed to revise these values to better reflect what is taking place during measure implementation.

### Program Logic Model



3. Process Flow Chart:



**Explanation**

The SoCalGas PDIP Process Flow Chart illustrates the timeline, activities, and roles of the six program actors (SoCalGas, Synergy, Energy Efficiency, RMS Energy, Public Administrators, and Financier).

**Days 1-3:** Program leads outreach to potential customers from Synergy intelligent outreach, SoCalGas utility referrals, or inbound calls and web inquiries to Synergy from

interested Public non-residential customers. An appointment is scheduled to qualify the site, plan the project, enroll the customer in the program, and schedule the direct install (DI) services.

**Days 4-7:** The DI measures are installed and the customer is offered a no-cost ASHRAE Level 1 audit sales consultation for PDIP advanced energy co-pay measures.

**Days 8-30:** Invoicing, deemed savings calculations, and inspections of direct install services are performed. This information is uploaded into SoCalGas's data/invoicing system. If the Public non-residential customer is interested in PDIP advanced energy measures, the walk-through audit and sales consultation are conducted. The customer is also given the option to apply for financing from the SoCalGas On-Bill Financing program.

**Days 31+:** Progress toward deep retrofits continues as advanced energy efficiency technologies are installed. Quarterly advanced energy efficiency program reports are submitted to SoCalGas.

#### 4. Incentive Tables, Workpapers, Software Tools:

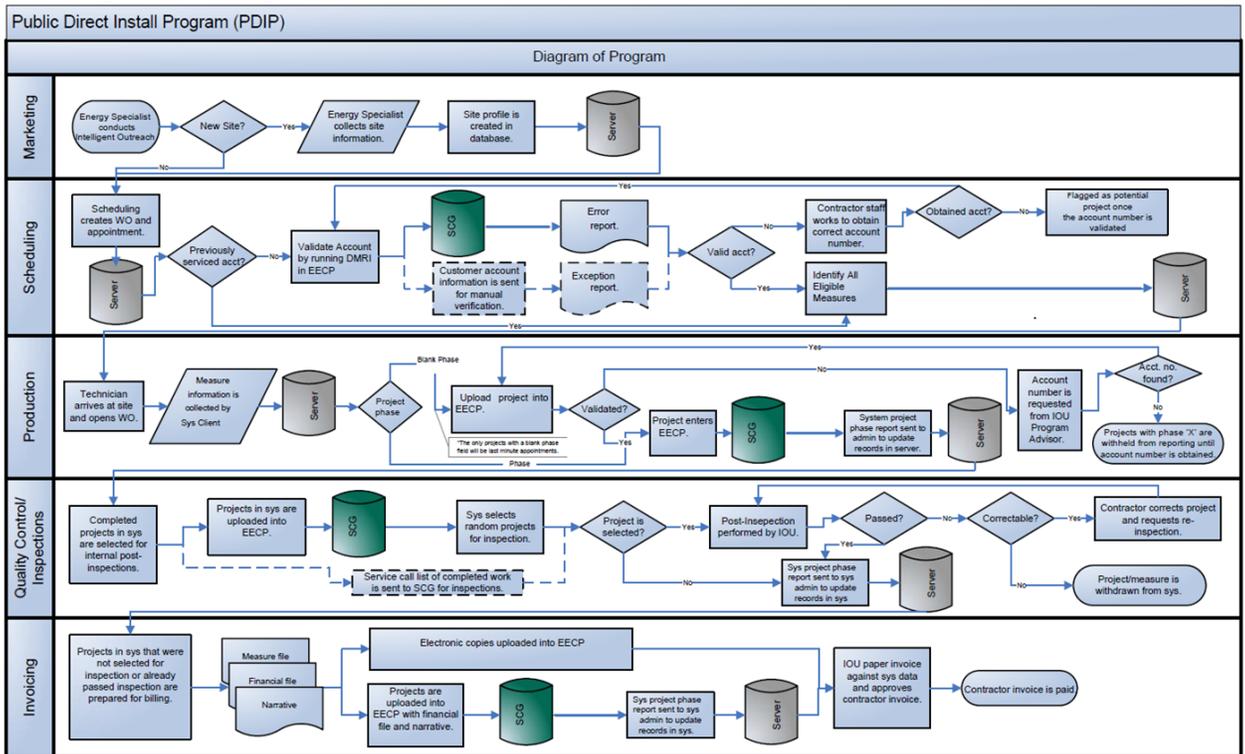
Measure Description	Workpaper
1 inch thick Tank insulation - Medium Temp Low Usage Indoor	SWWH018-01
2 inch thick Tank insulation - Medium Temp High Usage Indoor	SWWH018-01
2 inch thick Tank insulation - Medium Temp High Usage Outdoor	SWWH018-01
Com Showerhead FCV: 1.50 GPM	SWWH020-02
Commercial Showerheads, 1.5 gpm	SWWH020-02
Low-Flow Pre-Rinse Spray Valves, <0.75 gpm	SWFS013-01
Low-Flow Pre-Rinse Spray Valves, 0.75-1.07 gpm	SWFS013-01
Pipe Insulation - Com Hot Water $\geq$ 1 pipe Outdoor	SWWH017-01
Public Lavatory Control Valves for Commercial Buildings 0.5 GPM*	SWWH019-02
Public Lavatory Faucet Aerator for Commercial Buildings 0.5 GPM*	SWWH019-02
Small Commercial Fitting Insulation 1 inch < pipe $\leq$ 4 inch Hot Water_Outdoor	WPSCGWP110812A
Commercial Inst. Heaters, $\leq$ 200 kBtu/hr, 0.81 UEF	SWWH006-01
Commercial Inst. Heaters, $\leq$ 200 kBtu/hr, 0.87 UEF	SWWH006-01
Commercial Inst. Heaters, >200 kBtu/hr, 80% TE	SWWH006-01
Commercial Inst. Heaters, >200 kBtu/hr, 90% TE	SWWH006-01
Commercial Stor. Heaters, $\leq$ 75 kBtu/hr, 40G-HD-0.68 UEF (Epr, Ese, Ofs)	SWWH007-01
Commercial Stor. Heaters, $\leq$ 75 kBtu/hr, 40G-MD-0.64 UEF (Epr, Ese, Ofs)	SWWH007-01
Commercial Stor. Heaters, $\leq$ 75 kBtu/hr, 50G-HD-0.68 UEF (Epr, Ese, Ofs)	SWWH007-01
Commercial Stor. Heaters, $\leq$ 75 kBtu/hr, 50G-MD-0.64 UEF (Epr, Ese, Ofs)	SWWH007-01
Furnace Commercial (Epr, Ese, Ofs)	SWHC001-01

\*Measure eligibility and installations are contingent on the ability to execute water utility partnerships.

## 5. Quantitative Program Targets:

Total therms Energy Savings (Annual Net/ Program Net)	764,904 Annual Net Therms 2,294,712 Program Net Therms
Hard-to-Reach (HTR) or Disadvantaged community (DAC) Customers.	Sites – 1,800 projects Net Therms – 1,376,827
Forecasted Number of Customers Served by Program Year	2021 – 1,000 2022 – 1,000 2023 – 1,000
Area(s) Served (including service territory, climate zones, cities, and/or counties, as applicable)	Climate Zones: 4,5,6,8,9,10,13,14,15 & 16
Program TRC ratio (CET output)	1.87

## 6. Diagram of Program:



## 7. Evaluation, Measurement & Verification (EM&V):

### DEEMED Measure Recording and Verification

All direct install DEEMED measures are recorded on a field data capture tool that is signed by the customer agreeing that the measures were installed and to their satisfaction. The measure quantities are reported to SoCalGas on monthly invoice reports. SoCalGas inspectors and implementor inspectors perform field inspections to verify DEEMED measures installation reports are accurate. In the event that reported quantities vary from inspected quantities, the correct quantities are reported to the SoCalGas and invoice adjustments are made.

## 8. Normalized Metered Energy Consumption (NMEC):

No NMEC information is applicable to this program.

## Program Manuals

All programs must have manuals uploaded in CEDARS to clarify the eligibility requirements and rules of the program for implementers and customers. Program rules must comply with CPUC policies and rules. Table templates are available at CEDARS. At minimum, manuals should include:

1. **Eligible Measures or measure eligibility, if applicable:** Provide requirements for measure eligibility or a list of eligible measures.

Measure Description	Size Thresholds	Criteria
Tank Insulation	1", 2"	This measure is to install insulation on uninsulated tanks in customer facilities carrying fluids at 120 degrees - 170 degrees Fahrenheit. Insulation may be fiberglass or foam insulation, and must be one to two inches thick, and applied to existing bare liquid, solution storage, or transfer tanks.
Showerhead Flow Control Valves	1.50 GPM	Retrofit existing showerheads. Low-Flow showerhead flow control valve must reduce the flowrate of the showerhead below 1.8 gpm.
Showerhead	1.50 GPM	Retrofit existing showerheads. Low-Flow showerhead must reduce the flowrate of the showerhead below 1.8 gpm.
Low-Flow Pre-Rinse Spray Valve	<0.75 GPM, 0.75 - 1.07 GPM	Replace existing pre-rinse spray valves with a less than or equal to 1.07 gpm pre-rinse spray valves. Third-Party consultant to which Scope of Work applies ("Contractor") is expected to purchase the spray valve and provide installation at the customer's location. Installed pre-rinse spray valves must be in compliance with all applicable: statutes, acts, ordinances, regulations, and codes and standards of the federal, state, and local government agencies having regulatory jurisdiction of the customer.
Pipe Insulation	>= 1"	This measure is to install insulation on uninsulated pipes in the building carrying hot water at 120 degrees-Fahrenheit or higher. Acceptable types of pipe insulation for hot water pipes

		include polyethylene foam (up to 180 degrees F), UV-resistant polyethylene foam, and elastomer foam rubber.
Faucet Aerator Control Valve*	0.50 GPM	Retrofit existing faucets. Aerator flow control valve must reduce the flowrate of the faucet in a lavatory below 1.0 gpm.
Faucet Aerator*	0.50 GPM	Retrofit existing faucets. Aerator must reduce the flowrate of the faucet in a lavatory below 1.0 gpm.
Fitting Insulation	1"	This measure is to install insulation on uninsulated pipe fittings affixed to or in the building carrying fluids or steam at 120 degrees-Fahrenheit or higher.
Tankless Water Heater	<=200 kBtuh, >=200 kBtuh	This measure is to install a tankless water heater in replacement of a storage water heater. For water heaters larger than 200kbtu/hr capacity, 80% TE is required, while smaller water heaters less than 200kbtu/hr require UEF greater than or equal to 0.81. Contractor is expected to purchase the water heater and provide installation at the customer's location. Installed water heaters must follow all applicable: statutes, acts, ordinances, regulations, and codes and standards of the federal, state, and local government agencies having regulatory jurisdiction of the customer.
Storage Water Heater	<=75 kBtuh	This measure is to install a storage water heater in replacement of a storage water heater. Eligible water heaters are less than 75kbtu/hr capacity and minimum eligible UEF depends on the draw pattern of the water heater unit: 0.64 for medium draw, and 0.68 for high draw units. Contractor is expected to purchase the water heater and provide installation at the customer's location. Installed water heaters must follow all applicable: statutes, acts, ordinances, regulations, and codes and standards of the federal, state, and local government agencies having regulatory jurisdiction of the customer.
Furnace	>= 65 kBtuh	The measure is to install a high-efficiency central natural gas furnace, with a built-in variable speed motor (VSM). Eligible furnaces are greater than 65 kBtuh and have an annual fuel utilization efficiency ratio of 95% or greater.

\* Measure eligibility and installations are contingent on the ability to execute water utility partnerships.

## 2. Customer Eligibility Requirements:

PDIP is available to very small, small, and medium non-residential public customers that have an active SoCalGas account. Customers are not eligible to receive a rebate for the same measure(s) prior to EUL or RUL of the equipment.

If a customer has received an incentive or services from another state or local Public Goods Charge (PGC) program, they are ineligible to receive a rebate for the same product(s).

Conversely, if they receive a rebate from PDIP, they are ineligible to receive additional incentives or services from other state or local PGC program for the same product(s).

## 3. Contractor Eligibility Requirements:

All contractors that work in the service territory and offer the eligible program measures are eligible to participate in the program. Customer eligibility will still apply.

**4. Participating Contractors, Manufacturers, Retailers, Distributors, and Partners:**

Open network program.

**5. Additional Services:**

Not applicable to this program.

**6. Audits:**

During the direct install visit, the program participants are offered an ASHRAE Level 1 walk-through audit and sales consultation for the same day or a later date. The audit reveals advanced HVAC and water heating opportunities that can be financed for the customer. When these opportunities are presented to the decision maker, a timeline, roadmap, and next steps are established.

**7. Sub-Program Quality Assurance Provisions:**

The quality assurance plan puts emphasis on upfront training to prevent issues in quality before they happen. Field technicians are provided with quality measure installation training to ensure measures are installed to the customers' satisfaction and provide safe, clean, reliable energy savings.

Every two weeks, Synergy managers hold on-site trainings with Synergy energy specialists and installers at the company facilities and review industry changes/trends. These changes and trends are also emailed and communicated between program specific training sessions. Each position has a checklist of skills and knowledge to master. Synergy employs a full-time safety and compliance director that reviews and directs compliance with applicable laws and regulations.

The full-time quality production managers (QPM) actively resolve customer questions and concerns regarding workmanship and warranty. The QPMs also ensure that measures are installed properly and perform as they should while doing a physical inspection of the work. These managers focus on maintaining an overall pass rate of 95% on all measures and services inspected. Synergy uses the Synergy Tech System® to capture measure installation data in the field securely and electronically transfer the data for invoicing and energy savings reporting.

Failed inspections and customer satisfaction surveys are reported monthly with the invoicing reports to SoCalGas. Measures that fail inspection are credited back to the program's budget and customer complaints are resolved in a timely manner.

**Expectations of employees**

Employees are expected to follow guidelines outlined in the Sempra Energy Supplier Code of Conduct.

### **Inspections**

To ensure high production quality and customer satisfaction, QPM physically inspect a minimum of 10% of all jobs completed on the program. The percentage inspected is sufficient to identify positive and negative trends in installation quality and customer satisfaction.

The implementer's inspection tool assists managers by summarizing inspection results by installer to see which installers needs to be addressed or given additional training. The inspection tool also creates a checklist for each enrollment to verify that the measures and quantities were installed and reported correctly. The installers' workorder sheets are also inspected to make sure they are filled out completely and correctly.

### **Tools and Activities**

The Synergy Tech System (STS) is the field data capture tool that will be used to capture direct install and comprehensive energy efficiency installation data. Customer authorization and work order forms and the ASHRAE Level 1 audit forms will be hosted electronically in Fluix. iPads are used to run the Synergy tech system and Fluix applications in the field.

Customer signatures are captured electronically in STS and Fluix. Data from the ASHRAE Level 1 audit forms are converted into pdfs and emailed to the customer. The data is also compiled in a database to study non-residential public sector's energy efficiency needs and follow-up with the customer on comprehensive energy efficiency opportunities.

### **8. Other Program Metrics:**

None.