

PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3298



April 3, 2015

**Advice Letter 4774**

Rasha Prince, Director  
Regulatory Affairs  
Southern California Gas  
555 W. Fifth Street, GT14D6  
Los Angeles, CA 90013-1011

**Subject: Request from SCE and SoCalGas for Approval of Local  
Government Partnership Programs with the San Bernardino  
Association of Governments and North Orange County Cities**

Dear Ms. Prince:

Advice Letter 4774 is effective April 3, 2015.

Sincerely,

A handwritten signature in cursive script that reads "Edward Randolph".

Edward Randolph  
Director, Energy Division

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March 5, 2015

**ADVICE 3186-E**  
(Southern California Edison Company – U 338-E)

**ADVICE 4774-G**  
(Southern California Gas Company – U 904 G)

PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA  
ENERGY DIVISION

**SUBJECT: Request from Southern California Edison Company and Southern California Gas Company for Approval of Local Government Partnership Programs with the San Bernardino Association of Governments and North Orange County Cities.**

**PURPOSE**

Southern California Edison Company (SCE) and Southern California Gas Company (SoCalGas) hereby submit this Tier 2 Advice Letter (AL) for approval of two new Energy Efficiency (EE) local government partnership programs with the San Bernardino Association of Governments (SANBAG) and North Orange County Cities (NOCC).

**BACKGROUND**

In 2014, SCE and SoCalGas began developing new EE local government partnership programs with the SANBAG and NOCC. While the California Public Utilities Commission (Commission) recently approved the Investor Owned Utilities' (IOUs') 2015 EE Funding Requests in Decision (D.)14-10-046, these two new partnerships were not developed by that time. As such, SCE and SoCalGas conferred with the Commission's Energy Division and agreed to submit an AL with Program Implementation Plans (PIPs) to seek approval for these two new local government partnership programs. SCE and SoCalGas have reviewed the content of this AL with Energy Division in advance of this filing.

SCE and SoCalGas present the following proposed program budgets for the two new local government partnership programs:

Program	Budget		
	SCE	SoCalGas	Total
SANBAG	\$194,250	\$149,600	\$343,850
NOCC	\$185,000	\$152,245	\$337,245

In D.12-11-015, the Commission approved program number SCG3773 – New Partnership Programs, which included a budget set-aside to fund new local government partnership programs during the current EE program cycle. As of January 2015, the 2013 – 2015 budget available for new partnerships is \$797,532. From this program, SoCalGas proposes to fund shift \$152,245 to create program number SCG801 – North Orange County Cities Partnership and \$149,600 to create program number SCG3802 – San Bernardino Regional Energy Partnership.

In D.12-11-015, the Commission approved program number SCE-13-L-002Rollup - Energy Leader Partnership Reserve Fund (ELP Reserve Fund), which included a budget set-aside to fund new local government partnership programs during the current EE program cycle. From this program, SCE proposes to shift funds (see table above for funding levels) from the ELP Reserve Fund to create program number SCE-13-L-002V- North Orange County Cities Energy Leader Partnership and SCE-13-L-002W- San Bernardino Regional Energy Leader Partnership.

## **ATTACHMENTS**

The Program Implementation Plans (PIPs) are provided in Attachment A and B, which include a description of the proposed partnership programs, using the standard EE PIP template. For SCE, the PIPs include estimated energy savings, and demand reduction; SoCalGas' local government partnership program are non-resource and do not include estimated energy savings as the energy savings projects resulting from the partnership program are captured through the SoCalGas core program offerings. Pursuant to D.12-05-015<sup>1</sup>, the PIPs for these new partnership programs also demonstrate adherence to deep retrofit criteria, as defined in the SCE and SoCalGas PIPs, by providing examples of project types consistent with the deep retrofit criteria definition that is under active consideration.

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<sup>1</sup> D.12-05-015, Conclusions of Law #52.

- **Attachment A: SCE and SoCalGas' San Bernardino Association of Governments Partnership (SANBAG)**
- **Attachment B: SCE and SoCalGas' North Orange County Cities Partnership (NOCC)**

### **TIER DESIGNATION**

Pursuant to GO 96-B, Energy Industry Rule 5.2, this Advice Letter is submitted with a Tier 2 designation.

### **EFFECTIVE DATE**

This advice filing will become effective on April 4, 2015, the 30<sup>th</sup> calendar day after the date filed.

### **NOTICE**

Anyone wishing to protest this filing may do so by letter sent via U.S. mail, facsimile or E-mail, no later than **March 25, 2015**, which is 20 days after the date of this filing. Protests must be submitted to:

CPUC Energy Division  
ED Tariff Unit  
505 Van Ness Avenue, 4<sup>th</sup> Floor  
San Francisco, California 94102  
Facsimile: (415) 703-2200  
E-mail: [EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)

Copies of protests also should be mailed to the attention of the Director, Energy Division, Room 4004, at the address shown above.

The protest shall also be sent to the following parties via E-mail or U.S. mail (and by facsimile, if possible) at the address shown below on the same date it is mailed or delivered to the Commission:

#### **For SCE:**

Russell G. Worden  
Director, State Regulatory Operations  
Southern California Edison Company  
8631 Rush Street  
Rosemead, California 91770  
Facsimile: (626) 302-4829  
E-mail: [AdviceTariffManager@sce.com](mailto:AdviceTariffManager@sce.com)

Michael R. Hoover  
Director, State Regulatory Affairs  
c/o Karyn Gansecki  
Southern California Edison Company  
601 Van Ness Avenue, Suite 2030  
San Francisco, California 94102  
Facsimile: (415) 929-5544  
E-mail: [Karyn.Gansecki@sce.com](mailto:Karyn.Gansecki@sce.com)

**For SoCalGas:**

Sid Newsom  
Tariff Manager – GT14D6  
555 West 5th Street  
Los Angeles, CA 90013-1011  
Facsimile: (213) 244-4957  
E-mail: [snewsom@SempraUtilities.com](mailto:snewsom@SempraUtilities.com)

There are no restrictions on who may file a protest, but the protest shall set forth specifically the grounds upon which it is based and shall be submitted expeditiously.

In accordance with General Rule 4 of GO 96-B, SCE is serving copies of this advice filing to the interested parties shown on the attached GO 96-B, A.12-07-001 et al, R.09-11-014 and R.13-11-005 service lists. Address change requests to the GO 96-B service list should be directed by electronic mail to [AdviceTariffManager@sce.com](mailto:AdviceTariffManager@sce.com) or at (626) 302-4039. For changes to all other service lists, please contact the Commission's Process Office at (415) 703-2021 or by electronic mail at [Process\\_Office@cpuc.ca.gov](mailto:Process_Office@cpuc.ca.gov).

Further, in accordance with Public Utilities Code Section 491, notice to the public is hereby given by filing and keeping the advice filing at SCE's corporate headquarters. To view other SCE advice letters filed with the Commission, log on to SCE's web site at <https://www.sce.com/wps/portal/home/regulatory/advice-letters>.

For questions, please contact John Fasana at (626) 302-5236 or by electronic mail at [john.fasana@sce.com](mailto:john.fasana@sce.com)

**Southern California Edison Company**

/s/ Russell G. Worden  
Russell G. Worden

RGW:jf:jm  
Enclosures

# CALIFORNIA PUBLIC UTILITIES COMMISSION

## ADVICE LETTER FILING SUMMARY ENERGY UTILITY

MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No.: Southern California Edison Company (U 338-E)

Utility type:

ELC       GAS  
 PLC       HEAT       WATER

Contact Person: Darrah Morgan

Phone #: (626) 302-2086

E-mail: [Darrah.Morgan@sce.com](mailto:Darrah.Morgan@sce.com)

E-mail Disposition Notice to: [AdviceTariffManager@sce.com](mailto:AdviceTariffManager@sce.com)

EXPLANATION OF UTILITY TYPE

ELC = Electric      GAS = Gas  
 PLC = Pipeline      HEAT = Heat      WATER = Water

(Date Filed/ Received Stamp by CPUC)

Advice Letter (AL) #: 3186-E

Tier Designation: 2

Subject of AL: Request from Southern California Edison Company and Southern California Gas Company for Approval of Local Government Partnership Programs with the San Bernardino Association of Governments and North Orange County Cities

Keywords (choose from CPUC listing): Compliance

AL filing type:  Monthly  Quarterly  Annual  One-Time  Other

If AL filed in compliance with a Commission order, indicate relevant Decision/Resolution #:

Decisions 12-11-015 and 12-05-015

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL: \_\_\_\_\_

Summarize differences between the AL and the prior withdrawn or rejected AL: \_\_\_\_\_

Confidential treatment requested?  Yes  No

If yes, specification of confidential information:

Confidential information will be made available to appropriate parties who execute a nondisclosure agreement.

Name and contact information to request nondisclosure agreement/access to confidential information:

Resolution Required?  Yes  No

Requested effective date: 4/4/15      No. of tariff sheets: -0-

Estimated system annual revenue effect: (%): \_\_\_\_\_

Estimated system average rate effect (%): \_\_\_\_\_

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: \_\_\_\_\_

Service affected and changes proposed<sup>1</sup>: \_\_\_\_\_

Pending advice letters that revise the same tariff sheets: None

<sup>1</sup> Discuss in AL if more space is needed.

**Protests and all other correspondence regarding this AL are due no later than 20 days after the date of this filing, March 25, 2015, unless otherwise authorized by the Commission, and shall be sent to:**

CPUC, Energy Division  
Attention: Tariff Unit  
505 Van Ness Avenue  
San Francisco, California 94102  
E-mail: [EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)

For SCE:

Russell G. Worden  
Director, State Regulatory Operations  
Southern California Edison Company  
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Michael R. Hoover  
Director, State Regulatory Affairs  
c/o Karyn Gansecki  
Southern California Edison Company  
601 Van Ness Avenue, Suite 2030  
San Francisco, California 94102  
Facsimile: (415) 929-5544  
E-mail: [Karyn.Gansecki@sce.com](mailto:Karyn.Gansecki@sce.com)

For SoCalGas:

Sid Newsom  
Tariff Manager – GT14D6  
555 West 5th Street  
Los Angeles, CA 90013-1011  
Facsimile: (213) 244-4957  
E-mail: [snewsom@SempraUtilities.com](mailto:snewsom@SempraUtilities.com)

## Attachment A

SCE and SoCalGas' San Bernardino  
Association of Governments Partnership  
(SANBAG)



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# San Bernardino Regional Energy Leader Partnership

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1. **Program Name:** San Bernardino (SANBAG) Regional Energy Leader Partnership

2. **Projected Program Budget Table**

Energy Leader Partnership Program	Total Administrative Cost (Actual)	Total Marketing & Outreach Cost (Actual)	Total Incentive/Rebate Costs (Actual)	Total Direct Implementation (Actual)	Total Budget by Program (Actual)
San Bernardino Regional Energy Leader Partnership	\$ 19,425	\$ 15,750	\$ 89,250	\$ 69,825	\$ 194,250

3. **Projected Program Gross Impacts Table**

Energy Leader Partnership Program	2015 EE Program Gross kWh Savings	2015 EE Program Gross kW Savings
San Bernardino Regional Energy Leader Partnership	525,000	99

4. **Program Element Description and Expected Outcome**

The San Bernardino Associated Governments (SANBAG) serves 25 incorporated communities in the San Bernardino County west of Los Angeles in Southern California. Of these 25 incorporated communities, eight are currently participating in a Southern California Edison Energy Leader Partnership and two currently provide their own electricity. The goal of the SANBAG Regional Energy Leader Partnership is to provide an Energy Leader Partnership program to the remaining 15 cities.

San Bernardino County has a population of over two million people. With an area of 20,105 square miles, San Bernardino County is the largest county in the United States by area. Located in southeast California, this vast county stretches from thinly populated deserts along the Nevada and Arizona borders, to more densely populated urban areas adjacent to Los Angeles County. San Bernardino County includes the following incorporated communities:

City of Adelanto*	City of Hesperia*	City of Rialto
Town of Apple Valley*	City of Highland	City of San Bernardino*
City of Barstow*	City of Loma Linda	County of San Bernardino*
City of Big Bear Lake	City of Montclair	City of Twentynine Palms
City of Chino	City of Needles**	City of Upland
City of Chino Hills	City of Ontario	City of Victorville*
City of Colton**	City of Rancho Cucamonga	City of Yucaipa
City of Fontana	City of Redlands*	Town of Yucca Valley
City of Grand Terrace		

*\*These agencies are already participating in either joint or individual energy leader partnership efforts and therefore are not included in the San Bernardino Regional Energy Leader Partnership.*

*\*\*The City of Colton and the City of Needles both have public utilities that provide electricity and therefore are not included in the San Bernardino Regional Energy Leader Partnership.*

The proposed partnership provides an infrastructure to educate this region to raise awareness of energy efficiency implement retrofit and retro-commissioning projects in municipal facilities.

The program will provide energy education, retrofit assistance, and retro-commissioning, as well as design consultation and energy analysis of new construction and renovation project plans.

The primary objectives for the San Bernardino Regional Energy Leader Partnership include:

- Short and Long-term energy savings and demand reduction for partner cities and towns, and the communities they serve, as well as a reduction of greenhouse gas emissions.
- Enabling jurisdictions to leverage their local infrastructure to “spread the word” about energy efficiency and deepen the reach of statewide and local energy efficiency programs and services.
- Create an energy efficiency ethic as a result of delivering energy information to the communities, training and education for local government facility managers, energy managers and other staff in use of best practices methodology for identifying and implementing energy efficiency opportunities in their facilities.
- Promote energy efficiency through identifying energy saving opportunities and leveraging available resources to install cost-effective energy-saving technologies.
- Coordinate community outreach and training efforts to educate consumers and promote programs.
- Identify/offer financial packages that bundle practical utility incentives with monetary incentives aimed at improving the participation of residents, businesses and local government agencies.

While several cities in the region are part of other SCE partnerships or have their own electrical utility, the San Bernardino Regional Energy Leader Partnership seeks to include the remaining member agencies to promote energy efficiency and realize energy reductions and/or delay the need for costly infrastructure investments related to energy production and transmission to serve future population growth within the region itself.

Population growth, transportation needs, and the political environment have brought energy issues to the limelight for all of California, particularly the San Bernardino region. Several years ago, California experienced a major energy crisis bringing this issue to the attention of state and local governments, primarily due to the dependence on out-of-state energy. With such dependence on increasingly expensive and unstable foreign oil and the negative environmental impacts associated with some sources of energy creation/consumption, the region has begun to look for alternative strategies to meet its energy needs. Achieving energy efficiency and stability is necessary for achieving a high quality of life in any area. As a result, the San Bernardino region is turning towards strategies that promote renewable resources and clean technologies as well as self-generation.

#### **a) List of Program Elements**

The three core program elements are similar to those identified in the Energy Leader Partnership Program (ELPP) Master PIP: Element A - Government Facilities, Element B - Strategic Plan Activities, and Element C - Core Program coordination.

#### **Core Program Element A: Government Facilities**

This area will deliver energy savings during the next year. Every local government that participates in the partnership will achieve specified energy savings and greenhouse gas (GHG) reductions from the facilities and infrastructure that it manages through energy efficiency retrofits, operational improvements, and policy changes. Participating local governments will take advantage of partnership incentives for municipal facilities and, wherever possible, of eligible technical assistance offered by the partnership.

#### **A.1) Retrofit of county and municipal facilities**

The 15 cities within the San Bernardino Associated Governments that will be participating in the SANBAG Regional Energy Leader Partnership maintain several hundred municipal buildings. The partnership intends to retrofit local government facilities identified during the initial analysis of this partnership and continue to identify new opportunities through ongoing assessments of city facilities. Potential opportunities include, but are not limited to, lighting, HVAC, motors, pumps and city-owned streetlight retrofit projects.

Partner cities can leverage incentives offered through Southern California Edison (SCE) and Southern California Gas Company's (SCG) core programs.

The partnership will support city planning efforts throughout this process by:

- Identifying energy efficiency in municipal facility retrofit projects. The Partnership will build a comprehensive list of municipal retrofit projects from local government engagement, training and technical assistance.

- Implementing energy efficiency retrofits for municipal facilities, including pump optimization, lighting, controls, HVAC and retro-commissioning projects;
- Providing workforce education and training to city personnel to provide for long-term energy efficiency maintenance and upgrades;
- Enrolling municipal facilities into existing utility programs;
- Coordinating with the utilities' Emerging Technologies departments to offer test sites within city facilities;
- Coordinating advanced engineering audits to identify further opportunities for savings;
- Enrolling municipal facilities in the ENERGY STAR® Benchmarking Portfolio Manager Program; and
- Supporting continued efforts for proper energy use and tracking, including sub-metering, building automation systems, and utility management software.

### **A.2) Retro-Commissioning (of buildings or clusters of buildings)**

The partnership will identify the potential for energy-savings opportunities through the Retro-Commissioning (RCx) of municipal facilities within the partnership's Partner Cities. Many chronic building problems and energy waste can be resolved by making the low-cost or no-cost adjustments identified by the Retro-commissioning process. The partnership will encourage any facility receiving enhanced technical assistance to also pursue RCx and apply for utility incentives in order to optimize building performance and reduce energy costs. The partnership will also assist in providing training and education to city employees on the benefits of RCx during any major retrofits of existing governmental buildings.

### **A.3) Integrating Demand Response into the audits**

The partnership will identify and perform successful comprehensive energy efficiency projects with member cities, and enroll service accounts from each city in demand response programs in alignment with the ELPP Master PIP (shown below) and the Energy Leader Partnership model.

Participation in Demand Response (DR) is a requirement for participating in the Energy Leader Partnership incentive structure. Opportunities for municipal facilities to participate in SCE's DR programs will be identified by technical audits and assessments. SCE will work with the LGPs to make comprehensive packages of DR options available to the local governments within each partnership. Municipal participation in DR programs will prompt local governments to publicize their economic and societal benefits, encouraging their constituents to participate in DR. SCE will also provide standard tariff options, the California Solar Initiative (CSI), the Self-Generation Incentive Program (SCIP) and other programs. Integrated Demand Response audits will be provided, if applicable.

### **A.4) Technical assistance for project management, training, audits, etc.**

Standard programs available include energy efficiency training, energy audits, and technical assistance in alignment with the ELPP Master PIP. The SANBAG Regional Energy Leader Partnership will provide opportunities to extend this support to its 15 member cities. Technical support will also include training and education for local government facility

managers, energy managers, and other staff to educate city staff on best practices for identifying and implementing energy efficiency opportunities in their facilities. Additionally, city facilities will be analyzed to identify demand reduction projects and will include proposed energy conservation measures.

The SANBAG Regional Energy Leader Partnership will provide technical audits and assessments to help participating local governments identify, prioritize, and schedule municipal EE, and DR projects including EE retrofits, renovations, energy-efficient new construction, MBCx, and/or RCx. Specialized assistance will also be available through DR programs, including Technical Assistance & Technical Incentive (TA&TI) audits, and through the Savings by Design (SBD) Program.

### **A.5) On-Bill Financing**

The partnership will encourage Partner Cities to take advantage of SCE's On-Bill Financing Program for municipal facilities that install energy-efficient equipment. Financing and installation of equipment will be considered for partial or fully-extended repayment in the amount up to that offered through the applicable core program and will be included as a component line item of the monthly utility bill for repayment to the IOU. SCE will also provide the partnership with information on the nonresidential EE finance pilot that is expected to launch in 2015.

## **Core Program Element B: Strategic Plan Support**

### **B.1) Code Compliance Support**

The SANBAG Regional Energy Leader Partnership will encourage a culture of energy code compliance improvement and will develop various strategies across the partnering cities to improve compliance with building energy standards and appliance regulations. The partnership will conduct focused energy code training targeted to the San Bernardino region including workshops for municipal planning and building staff, building professionals, and contractors.

### **B.2) Reach Code Support**

The partnership will work toward establishing meaningful CEC-approved Reach codes as part of its effort to add value to energy efficiency in alignment with the strategies stated in the ELPP Master PIP (shown below). This activity will follow the proposed path described in the Codes & Standards PIP.

The Reach Code Support sub-element will be implemented primarily through the Codes and Standards Program, with additional support from the Energy Leader Program Strategic Support sub-program (see Codes and Standards PIP and Energy Leader Strategic Support sub-program PIP). Some LGPs may include Reach Code activities to promote local codes that exceed Title 24 requirements. These activities might include training local government staff about adoption and implementation of model reach codes, establishing expedited permitting and title approval processes, and establishing fee structures and other incentives for green buildings and other above-code developments (such as green building standards for new construction and retrofits/retro-commissioning or carbon offset reduction programs that exceed Title 24).

### **B.3) Guiding Document(s) Support**

The SANBAG Regional Energy Leader Partnership objectives include development of Energy Action Plans and Climate Action Plans to document baseline energy use and emissions, as well as establishing documentation in alignment with the strategies as described in the ELPP Master PIP. These baselines will be used to set and achieve emission reductions and energy savings. Individual city plans will be used to develop a regional energy savings plan.

### **B.4) Financing for the community**

The SANBAG Regional Energy Leader Partnership will provide education and outreach programs for the partnership communities in alignment with the strategies as described in the ELPP Master PIP (shown below). The partnership will coordinate with any available community financing programs, including the existing Property Assessed Clean Energy (PACE) program, marketed as the HERO Program.

The SANBAG Regional Energy Leader Partnership will provide technical financing assistance through:

- Conducting workshops and webcasts about innovative financing strategies tested and deployed by local governments, such as special assessment districts and applications of AB 811, to accelerate adoption of cleaner energy by mitigating the initial cost of EE retrofits;
- Helping local governments identify potential financial partners for cleaner energy projects;
- Providing links to websites with information about zero-to-low interest loans, grants, and subsidies for cleaner energy projects;
- Conducting webinars about how to evaluate financing options; and
- Providing guidance about low-cost ways to create high value for stakeholders and constituents that also meet aggressive local green goals (e.g., builders' entitlements for developers).

Finally, the SANBAG Regional Energy Leader Partnership will assist local governments in linking the energy savings for community energy projects to climate action strategies, AB 32 compliance, and long-term clean energy security and environmental sustainability, and help local governments communicate these options to community and business leaders whose support will be needed to implement them.

### **B.5) Peer to Peer Support**

The SANBAG Regional Energy Leader Partnership will actively participate and support peer-to-peer collaboration through forums for the partnering cities and through the strategies as described in the ELPP Master PIP.

Through the partnership the following will be facilitated:

- *Partner-to-Partner Dialogue*

The partnership team leaders have the unique advantage of providing one another with peer-to-peer leadership that would not normally exist without the partnership. Through the partnership, partner cities are able to leverage the experience and expertise of fellow peer cities to increase awareness and participation levels and positively influence their own local government. Through regular team leaders meetings and webinars, team leaders are able to engage in peer-to-peer dialogue, support each other with local policy and code advancement, and share best practices and technical knowledge.

- *Partner-to-Partner Sharing*  
Cities have expressed interest in sharing details about municipal projects and successes. The Partnership can facilitate easy sharing of information through a searchable webpage that lists municipal energy efficiency project details and energy savings totals. The project will leverage free program applications (e.g., GoogleMaps) to provide more flexibility for updating information.
- Some cities are in the process of implementing a Community Energy Efficiency Project Management System (CEEPMS). This program is built into a city's existing on-line permitting system to identify projects with energy efficiency potential and educate the consumer about the potential energy efficiency opportunity.

## **Core Program Element C: Core Program Coordination**

### **C.1) Outreach & Education**

The partnership will establish a comprehensive Marketing Education & Outreach (ME&O) Plan that will be expanded to incorporate: deep retrofit strategies among the 15 member cities and their business communities including but not limited to educational workshops to assist cities in moving forward with energy savings projects, Retro-Commissioning, Energy Upgrade California, policies, codes, and ordinances; general awareness events and exhibits to publicize the partnership and its goals throughout the communities (including environmental fairs and expos); marketing energy efficiency programs through a variety of media channels including mailers, press releases, and quarterly e-newsletters; and special workshops throughout the 15 cities.

The partnership will also provide energy code training to target the needs of the San Bernardino region, promote whole-building performance to get better space conditioning, coordinate emerging “green” or sustainability standards, and promote programs that foster sustainability including Energy Upgrade California, Retro-Commissioning, California New Homes Program; Home Energy Efficiency Program, Appliance Recycling Program, Benchmarking and Performance Tracking, and On-Line Buyer’s Guide and Office and Home Electronics Program.

### **C.2) Residential and Small Business Direct Install**

The partnership will promote outreach efforts to support and coordinate with the SCE core programs for San Bernardino commercial and small businesses customers as well as leverage existing member cities chambers of commerce, bill mailing inserts, and municipal publications to distribute information and drive greater participation.



### **C.3) Third-party program coordination**

The partnership will actively support third party programs through the strategies as described in the ELPP Master PIP.

### **C.4) Retrofits for LIEE-qualified customers**

The partnership will support retrofits for those who qualify for this program through active outreach and marketing. Outreach efforts will be used where ever possible.

### **C.5) Technical assistance for program management, training, audits, etc.**

The partnership anticipates bringing technical and financial assistance from the following additional programs and offerings to its communities: SCE & SCG Energy Center offerings, Energy Star® Qualified Refrigerator Rebates, Refrigerator and Freezer Recycling, Electric Water Heater Rebates, and Energy Star® Qualified Lighting; nonresidential custom and deemed programs; Multi-family Energy Efficiency Rebate Program; Non-Residential Audits; Retro-Commissioning; Savings by Design; Variable Speed Pool Pump Rebate Program.

#### **b) Overview**

**See Section 4.**

#### **c) Non-incentive services**

The SANBAG Regional Energy Leader Partnership will leverage its portfolio of ME&O activities to deliver non-incentive services such as those listed below. These non-incentive services are designed to increase community enrollment in energy core programs and participation in SCE services and resources:

- Account manager support;
- Training at the Energy Education Center in Irwindale;
- Speakers bureau;
- Limited giveaway items;
- Scheduling special events such as Operation Lamp Exchange;
- Design and printing of brochures and other partnership collateral materials; and
- Media/Press/Publicity support.

#### **d) Target audience**

The target audience consists of city and county staff, management and policymakers (elected officials), and residential and business customers in the San Bernardino region.

#### **e) Implementation**

In addition to the strategies and coordination as described in the ELPP Master PIP:

The partnership's strategies include an integrated approach to energy consumption and reduction, increasing awareness of energy efficiency, demand response, Low-Income Energy Efficiency, California Alternative Rates for Energy Program, Self-Generation Incentive Program, and California's Solar Initiative.

#### **Sub-Element A1 – Government Facilities Retrofits**

Each local government participating in the SANBAG Regional Energy Partnership will develop and implement municipal clean energy projects. When multiple local governments participate in an LGP in which a partner or third party is designated as a "Lead Implementer" ("Bundled" partnerships), the Lead Implementer is responsible for coordinating the local government participants' efforts and assuring that their collective efforts result in achieving the overall partnership's EE & DR goals.

- The Lead Implementer will also provide a single point of contact with SCE for identifying and bringing in the technical assistance needed by each local government participant. As noted previously, Sub-Element A1 will be coordinated with Sub-Element B5 (Peer-to-Peer Support) to share technical, operations, financing, and other types of energy strategies, tools and techniques with other local governments in California (and, potentially, nationally).

#### **Sub-Element A2 – Retro-commissioning (RCx) &/or Monitoring-Based Commissioning (MBx)**

Candidate facilities for RCx and/or MBCx will be identified through the development process that will align with SCE's Core Program offering to ensure consistency and will be supported with SANBAG Regional Energy Partnership technical assistance (see Sub-Element A4 – Technical Assistance). This process consists of performing field-based functional tests at the building system and/or subsystem level, including on-site equipment testing, monitoring and/or verifying proper operation, and calibration of a sample of the systems, and assessing potential projects for technical feasibility and cost-effectiveness. Sub-Element A1, Sub-Element A2 will be coordinated with Sub-Element B5 – Peer-to-Peer Support.

#### **Sub-Element A3 – Integrated Demand Response**

The Integrated DR development process will also identify eligible non-emergency municipal facilities and functions — such as office buildings where lighting and/or HVAC could be interrupted or reduced without risk to public health and safety — that could participate in SCE DR programs. LGPs will also be encouraged to identify self-generation opportunities, especially for cleaner technologies such as solar PV, advanced micro-turbines, and fuel cells.

See Core Program Element C (Core Program Coordination) for more information about how the SANBAG Regional Energy Partnership will coordinate with the utilities' Self Generation Incentive Program (SGIP), and Core Program Element B (Strategic Planning Support) for information about coordination with other types of RE and SG programs.

#### **Sub-Element A4 – Technical Assistance**

Technical assistance starts with obtaining a list of all of the municipal facilities of each participating local government with their account name (e.g., city/county department), address, type of municipal function being performed at that location, age of the building (known or estimated), size in square feet, and any other readily compiled, relevant information. The list is then matched with energy use to identify the energy use of the facility and prioritize high-potential opportunities.

SCE Business Customer Division (BCD) Representatives have met with all LGPs to help compile lists of potential retrofits and request information about each facility's situation. Some preliminary energy assessments have been conducted to identify highest-priority projects for implementation upon CPUC approval of the SANBAG Regional Energy Partnership.

SCE will provide expanded professional services to ensure end-to-end project support to local government partners.

Element A-4 will be coordinated with Sub-Element B-5 Peer-to-Peer Support to share information with other local governments.

#### **Sub-Element A5 – On-Bill Financing**

See discussion above in Section 4.b. (Overview, Incentives, Sub-Element A5) for a description of how the SANBAG Regional Energy Partnership will approach On-Bill Financing.

### **5. Program Element Rationale and Expected Outcome**

#### **a) Quantitative Baseline and Market Transformation Information**

By its nature, market transformation occurs as a result of numerous factors and programs, not single sub-programs. Therefore, all metrics and goals are proposed at the highest program level. Please refer to the quantitative baseline and market transformation discussion, presented in the overall program PIP.

#### **b) Market Transformation Information**

By its nature, market transformation occurs as a result of numerous factors and programs, not single sub-programs. Therefore, all metrics and goals are proposed at the highest program level. Please refer to the quantitative baseline and market transformation discussion, presented in the overall program PIP.

#### **c) Program Design to Overcome Barriers**

The Cities that form the SANBAG Regional Energy Leader Partnership will have barriers consistent with those identified in the ELPP Master PIP (shown below), and will employ the same strategies to overcome them, as described in the ELPP Master PIP.

The primary barriers to local government EE programs and the strategies the SANBAG Regional Energy Leader Partnership will employ to overcome these barriers include:

**Primary Barrier:** Many local governments do not have adequate staff resources to develop and manage a municipal energy program, especially in the current economic climate. In addition, existing staff may not be knowledgeable about energy issues and options.

**Strategies:** The SANBAG Regional Energy Leader Partnership will provide a comprehensive municipal clean energy program that includes technical assistance for program and project development and management, training in EE and DR opportunities, as well as information on broader energy programs and offerings. The SANBAG Regional Energy Leader Partnership will help identify, qualify and schedule EE, DR and RE projects.

The SANBAG Regional Energy Leader Partnership will overcome these barriers by providing hands-on assistance to local governments for all project stages, including obtaining financing and optimizing EE, DR & RE solutions on an integrated, whole-system basis. This will:

- Directly link energy savings and fossil fuel reduction to GHG reduction and AB 32 compliance;
- Achieve short- and long-term energy savings;
- Demonstrate the local government's commitment to efficiency to its constituents and stakeholders; and
- Enable local governments to become champions for EE, DR, and RE, so as to further reduce energy usage and associated GHG impacts within their communities.

**Primary Barrier:** Access to financing is a significant barrier. Even under the best financial circumstances, funding for these types of energy projects (deemed "discretionary" when they are not absolutely needed to protect public health & safety) is difficult to obtain, since they must compete for limited funds with mission-critical activities.

**Strategies:** The SANBAG Regional Energy Leader Partnership will provide financial planning assistance including, but not limited to, cost/project estimating and budgeting, identification of financing options, help with scheduling and preparing for reviews and approvals of proposed energy projects and budgets, and on-bill financing. Professional services and project management offerings will be expanded in the 2013-2014 transition period.

**Primary Barrier:** With significant staffing and financial challenges, the local government sector experience lost opportunities which can occur when viable efficiency opportunities are not identified or are value-engineered out of a project due to lack of funds, lack of information, and/or lack of management support.

**Strategies:** The SANBAG Regional Energy Leader Partnership’s comprehensive approach minimizes lost opportunities in municipal facilities by directly tackling major barriers through educating decision-makers, conducting technical assistance to identify and propose opportunities, providing professional services to develop and vet opportunities, and coordination and outreach of stakeholders and resources.

**d) Quantitative Program Objectives**

**Table 5**

<b>Program/Element</b>	<b>Program Target by 2015</b>
Target #1 Municipal Retrofits (kWh)	See Section 2
Target #2 Municipal Retrofits (kW)	See Section 3
Target #3 Number of workshops	2
Target #4 Number of Ordinances, Codes, etc.	0
Target #5 Number of ME&O events	3

**6. Other Program Element Attributes**

**a) Best Practices**

The SANBAG Regional Energy Leader Partnership will embody the best practices strategies described in the ELPP Master PIP.

The SANBAG Regional Energy Leader Partnership will follow the best practices in energy programs design, as summarized below:

<b>Primary Barriers/Program Challenges</b>	<b>Program Best Practices</b>
Insufficient technical and financial resources	<i>One- stop Shopping</i> - Provides comprehensive bundle of technical, economic, marketing and implementation assistance through implementing partner.
First cost of EE investments	<i>Financing</i> - On-bill financing, other low interest energy loans, possible establishment of self-replenishing energy efficiency/savings funds, PACE
Incomplete implementation (due to adoption of aggressive policies & goals without a sound implementation & financing plan)	<i>Course Corrections</i> - Mechanism for constant tracking, monitoring and review of program results vs. challenges, allowing sufficient time for course corrections

<b>Primary Barriers/Program Challenges</b>	<b>Program Best Practices</b>
Insufficient motivation	<i>Comprehensive Benefits</i> – Combines measure incentives with funding support for ME&O activities that are very important to local governments. Also, ascending to the leadership role is a natural and appropriate role for governmental entities.
Lost opportunities	<i>Comprehensive Strategies</i> – Comprehensive whole portfolio, building and facility approaches minimize lost EE and DR opportunities by municipal facilities, while the companion ME&O strategy leverages the participating local governments’ efforts to encourage residents and business to also become energy efficient.

**b) Innovation**

City officials will be recruited and utilized as advocates. City facilities will be enrolled into different energy programs. There will be periodic team meetings during which agencies can engage in peer to peer problem solving. Energy initiatives and commitment to addressing energy issues will be required to be incorporated into new and existing Energy Action Plans. Workshops, events and presentations will empower the communities and their local government with the knowledge needed to recognize concepts and benefits. The significant benefits of energy efficiency, demand response and renewable resources will be the foundation for training focused on behavioral change and sustainable participation.

**c) Interagency coordination**

This partnership represents a comprehensive and integrated approach to energy efficiency, natural gas efficiency, and water efficiency. Projects such as wastewater, storm water and potable water capital projects will be identified and developed ensuring that the municipalities are as energy efficient as possible. Through its local government and consulting network, the Partnership will encourage coordination with agencies as noted within the ELPP Master PIP as well as with the participating IOUs, SCE and SCG.

**d) Integrated/coordinated Demand Side Management**

The IOUs have identified Integrated Demand Side Management (IDSM) as an important priority. As a result they have proposed the establishment of a Statewide Integration Task Force (Task Force). SCE’s local government partnerships will monitor the progress of the statewide IDSM efforts and work closely with the Task Force to identify comprehensive integration approaches and to implement best practices.

The SANBAG Regional Leader Partnership program plans include identifying and enrolling municipal service accounts from each city in demand response programs in alignment with the Energy Leader Partnership model and the ELPP Master PIP (shown below).

In addition, the LGPs will use an integrated approach, encouraging participation in DR, CSI, and SGIP programs in order to achieve coordinated delivery of DSM options. Although the funding for integration will come from the dedicated funding source for each integrated measure, SCE will make this transparent to the local government and its constituents.

Some LGPs will achieve integration of all elements, while others may only integrate a few. The integrated elements include:

- Integrated energy audits will be offered to government facilities that show savings potential and a willingness to commit the additional time and financial investments, while standard EE audits will be offered to all other program participants;
- Emerging Technologies and CEC-PIER collaboration is expected to include pilot projects and market acceleration assistance for market-ready products in the general categories of day lighting, lighting, HVAC, controls, and building envelope improvements;
- Commissioning and retro-commissioning services will continue being offered to segment customers; and
- DR opportunities will be targeted in larger facilities, particularly as part of monitoring-based retro-commissioning efforts where controls to facilitate DR efforts would be installed.

**e) Integration across resource types (energy, water, air quality, etc.)**

The partnership promotes comprehensive sustainability, including water conservation, solid waste management, and alternative mobility. A key focus of the partnership will be assisting our local government partners in identifying and exploiting cost-effective opportunities for integration with other resource areas including water, solid waste, and air quality around climate action and AB 32 through coordination with other utility programs and industry resources.

**f) Pilots**

No pilots are planned through this partnership but the partnership will be available to promote emerging technologies.

**g) EM&V**

See the ELPP Program Overview SCE-13-L-002.

## 7. Partnership Program Advancement of Strategic Plan Goals and Objectives:

**Table 6**

Strategic Plan Strategy	Program Approach to Achieving Strategic Plan Goal
1-1: Develop, adopt and implement model building energy codes (and/or other green codes) more stringent than Title 24's requirements, on both a mandatory and voluntary basis; adopt one or two additional tiers of increasing stringency.	Training and information will be provided to cities about Title 24 and ways to encourage more stringent energy codes on a voluntary basis.
1-2: Establish expedited permitting and entitlement approval processes, fee structures and other incentives for green buildings and other above-code developments.	The Partnership will offer training and educational workshops for jurisdictions' planning and building department staff regarding opportunities for expedited permitting and other incentives, green building codes and energy efficient design.
1-3: Develop, adopt and implement model point-of-sale and other point-of transactions relying on building ratings.	The potential for this will be evaluated.
1-4: Create assessment districts or other mechanisms so property owners can fund EE through city bonds and pay off on property taxes; develop other EE financing tools.	The partnership will assist in the adoption of PACE programs in Partnership partner cities along with adoption of other appropriate innovative EE financing approaches.
1-5: Develop broad education program and peer-to-peer support to local governments to adopt and implement model reach codes.	The Partnership will work to enhance education and peer-to-peer support for local governments.
1-6: Link emission reductions from "reach" codes and programs to CARB's AB 32 program	The potential for this will be evaluated.
2-2: Dramatically improve compliance with and enforcement of Title 24 building code, and of HVAC permitting and inspection requirements (including focus on peak load reductions in inland areas).	The Partnership supports the development of training and education programs.
2-3: Local inspectors and contractors hired by local governments shall meet the requirements of the energy component of their professional licensing (as such energy components are adopted).	The potential for this will be evaluated.
3-1: Adopt specific goals for efficiency of local government buildings	Various opportunities for improved efficiency, including environmentally preferred purchasing policies, and incentives will be shared with the cities.
3-2: Require commissioning for new buildings, and re-commissioning and retro-commissioning of existing buildings.	Energy efficiency upgrades and retro-commissioning of municipal facilities is a primary partnership objective.



<b>Strategic Plan Strategy</b>	<b>Program Approach to Achieving Strategic Plan Goal</b>
3-4: Explore creation of line item in local governments’ budgets or other options that allow EE cost savings to be returned to the department and/or projects that provided the savings to fund additional efficiency.	The potential for this will be evaluated.
3-5: Develop innovation Incubator that competitively selects initiatives for inclusion in local government pilot projects.	The potential for this will be evaluated and explored with participating jurisdictions to see if it could be effective.
4-1: Local governments commit to clean energy/climate change leadership.	The potential for this will be evaluated.
4-2: Use local governments’ general plan energy and other elements to promote energy efficiency, sustainability and climate change.	Energy efficiency efforts will be integrated with climate action leadership.
4-4: Develop local projects that integrate EE/DR/water/wastewater end use.	Training and educational opportunities to explore ways to promote energy efficiency, sustainability and greenhouse gas reduction through general plans and community planning will be sought.
4-5: Develop EE-related “carrots” and “sticks” using local zoning and development authority.	The potential for this will be evaluated.

### 8. Deep Energy Retrofits:

Pursuant to D.12-05-015, the IOUs are required to demonstrate that new partnerships introduced after 2012 adhere to deep retrofit criteria. Per the language developed with the Energy Division in the SCE’s 2013-2104 Master ELP PIP, partnerships must incorporate one or more measures from Table 7 below to demonstrate compliance with this deep retrofit requirement. A project may also be defined across IOUs and electric and gas sectors (e.g., joint SoCalGas and SCE project).

Deep retrofit requirements surrounding partnership expansions (new partner or partnership), shall be considered satisfied when the partner or partnership incorporates one or more measures from Table 7 below. The deep retrofit requirements are triggered when: a) new partnerships are introduced, or b) one or more cities are added to an existing partnership. An exception shall be granted in cases where SCE demonstrates that the new partner addition can be fully accommodated by the partnership’s existing funding allocation as provided by the budget within the respective PIP; and therefore would not require a fund shift or reliance on the ELP Reserve Fund. In this instance (i.e., if a partnership adds a new city without increasing the partnership budget), the city is not required to meet the deep retrofit criteria, but must update the PIP through the PIP addendum process and communicate with the PRG, as described above.

**Table 7: Mid-Cycle Partner/Partnership Deep Retrofit Criteria Qualifying Measure**

HVAC solutions	Refrigeration solutions
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Targeted advanced technology lighting solutions (i.e., LED)	Water-energy nexus solutions
Combined electricity and gas measures	Retro-commissioning
Process solutions (e.g., chillers, blowers, boilers, storage tanks)	

Deep energy retrofits projects proposed by the SANBAG Regional Energy Partnership meet the deep energy retrofit criteria and include: water system pump replacement and system optimization, LED streetlighting, energy management system controls, chiller plant retrofit projects, HVAC replacement.

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- 1. Program Name:** San Bernardino Regional Energy Partnership  
**Program ID:** SCG 3802  
**Program Type:** Local Government Partnership

**2. Program Element Description and Implementation Plan**

**a) List of Program Elements**

The three core program elements are similar to those identified in the Master Program Implementation Plan (PIP):

- Element A - Government Facilities,
- Element B - Strategic Plan Activities, and;
- Element C - Core Program coordination.

**b) Overview**

San Bernardino County has a population of over 2,035,210 people. With an area of 20,105 square miles, San Bernardino County is the largest county in the United States by area. It is larger than nine states, larger than the four smallest states combined, and larger than 71 sovereign nations. Located in southeast California, this vast county stretches from thinly populated deserts along the Nevada and Arizona borders, to more densely populated urban areas adjacent to Los Angeles County.

San Bernardino Associated Governments (SANBAG) serves 25 incorporated communities in the San Bernardino County west of Los Angeles in Southern California. Of these 25 incorporated communities, eight are currently participating in either a single city or multi-city Southern California Gas Company (SoCalGas) Partnership, or are not served by SoCalGas and two currently provide their own electricity and will not be an active part of the Partnership. Although the City of Colton, and Needles, are not served by Southern California Edison (SCE) and will not be an active participant in the Partnership, SoCalGas is able to support the municipally served cities as needed.

The San Bernardino Regional Energy Partnership will be a joint partnership with both SoCalGas and SCE with San Bernardino Association of Governments as the implementer. The goal of the San Bernardino Regional Energy Partnership is to provide an Energy Efficiency (EE) Partnership program to the remaining 14 cities through SoCalGas. This includes the cities of Chino, Chino Hills, Fontana, Grand Terrace, Highland, Loma Linda, Montclair, Ontario, Rancho Cucamonga, Rialto, City of Twenty nine Palms, City of Upland, Yucaipa, and Town of Yucca Valley. SCE, through the Partnership, will also partner with the City of Big Bear Lake, which is not served by SoCalGas.

SANBAG Member Cities:

City of Adelanto*	City of Hesperia*	City of Rialto
Town of Apple Valley*	City of Highland	City of San Bernardino*

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City of Barstow*	City of Loma Linda	County of San Bernardino*
City of Big Bear Lake***	City of Montclair	City of Twenty nine Palms
City of Chino	City of Needles**	City of Upland
City of Chino Hills	City of Ontario	City of Victorville*
City of Colton**	City of Rancho Cucamonga	City of Yucaipa
City of Fontana	City of Redlands*	Town of Yucca Valley
City of Grand Terrace		

\*These agencies are already participating in either joint or individual energy leader partnership efforts with SCE and/or SCG and therefore will not be included in the San Bernardino Regional Energy Partnership.

\*\*The City of Colton and the City of Needles both have public utilities that provide electricity and therefore will not be included in the San Bernardino Regional Energy Partnership.

\*\*\* SoCalGas does not serve the City of Big Bear Lake.

The proposed program provides an infrastructure for the region to assist in raising awareness of energy efficiency (EE) and in completing targeted retrofit and retro-commissioning projects in city/town facilities. The program will provide energy education, retrofit assistance, and retro-commissioning as well as design consultation and energy analysis of new construction and renovation project plans. Analysis of city facilities, concentrating on an integrated approach will be conducted to identify energy and demand reduction projects with energy conservation measure alternatives to optimize the energy and environmental performance of a new building design or extensive retrofit project in each of the targeted cities/towns thereby encouraging deep energy retrofits. The newly proposed Partnership qualifies under the CPUC’s expansion rules covering Deep Retrofits as described below within Section 3.c.

SoCalGas and SCE’s objectives for the Local Government Partnerships include:

- Short and Long-term energy savings and demand reduction for Local Government organizations and the communities they serve as well as a reduction of greenhouse gas (GHG) emissions. Jurisdictions will leverage their local infrastructure to “spread the word” about EE and deepen the reach of statewide and local programs and services.
- An EE ethic resulting from delivery of energy information to the communities, training and education for local government facility managers, energy managers and other staff in use of best practices methodology for identifying and implementing EE opportunities in their facilities.

The primary objectives for the San Bernardino Regional Energy Partnership include:

- Promote integrated EE through identifying/assisting in the coordination of opportunities for cost-effective implementation of natural gas and electric energy-saving technologies.
- Coordinate community outreach and training efforts to educate consumers and promote programs.
- Identify/offer financial packages that bundle practical utility incentives with various monetary incentives aimed at improving the participation of residents, businesses and local government agencies.

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While several cities in the region either have their own electrical utility or have formed successful individual city partnerships or sub-regional partnerships, the San Bernardino Regional Energy Efficiency Partnership seeks to include the remaining agencies within San Bernardino County to promote EE in order to realize reductions and/or delays in the need for costly infrastructure investments related to energy production and transmission for future population growth within the region itself.

Population growth, transportation needs, and the political environment have brought energy issues to the limelight for all of California, particularly the San Bernardino region. Several years ago, California experienced a major energy crisis bringing this issue to the attention of state and local governments, primarily due to the dependence on out-of-state energy. With such dependence on increasingly expensive and unstable foreign oil and the negative environmental impacts associated with some sources of energy creation/consumption, the region has begun to look for alternative strategies to meet its energy needs. Achieving EE and stability is necessary for achieving a high quality of life in any area. As a result, the San Bernardino region is turning towards strategies that promote renewable resources and clean technologies as well as self-generation.

**Core Program Element A: Government Facilities**

This area will attempt to deliver energy savings during the next year. Every local government that participates in the partnership will attempt to achieve specified energy savings and GHG reductions from the facilities and infrastructure that it manages through technology retrofits, operational improvements and policy changes. Participating local governments will take advantage of partnership incentives for municipal facilities and, wherever possible, of eligible rebate, incentive and technical assistance programs offered by their serving utilities.

**A.1) Retrofit of county and municipal facilities**

The 14 participating jurisdictions within the San Bernardino Associated Governments that will be participating in the San Bernardino Regional Energy Partnership maintain several hundred municipal buildings. The participating jurisdictions of SANBAG will work with SoCalGas and SCE to implement EE projects identified at their municipal facilities. The audits will identify new opportunities through conducting assessments for city facilities through Technical Assistance and Support. The assessments are intended to be an ongoing process throughout 2015 and will support jurisdictions with opportunities to prioritize their municipal energy efficiency projects.

As a new Partnership, the San Bernardino Regional Energy Partnership will in addition to targeting under-served and hard to reach customer segments, optimize energy savings through deep retrofits in accord with the CPUC's expansion rules covering Deep Retrofits as described below within Section 3.c. Potential deep retrofits EE measures may include but are not limited to HVAC systems, Retro-Commissioning, Hot Water Heating & Space

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Heating retrofits. The Partnership has established a savings target of 4,900 therms from municipal facilities which will be funneled to core rebate and incentive programs.

**A.2) Retro-Commissioning (of buildings or clusters of buildings)**

The CPUC has identified deep retrofits as an area of focus during the 2013 – 2015 Transition Cycle. The San Bernardino Associated Governments intends to achieve this new focus via a greater emphasis on Retro-Commissioning. This will provide a systematic whole system approach to EE. Many chronic building problems and energy waste can be resolved by making the low-cost or no-cost adjustments identified by the Retro-Commissioning process.

**A.3) Integrating Demand Response into the audits**

All retrofit projects will be assessed for opportunities to reduce peak demand. Where feasible and where financing opportunities exist, solar, and other alternatives energy projects will be considered for project inclusion.

**A.4) Technical assistance for project management, training, audits, etc.**

Each partnership has a specific budget for each of these elements. Standard programs available include EE training, energy audits, and technical assistance in alignment with the Master PIP. The San Bernardino Associated Governments already has professional technical support under contract and will explore opportunities to extend this support to its 14 member cities. It is intended that this technical support will include training and education for local government facility managers, energy managers and other staff in use of best practices methodology for identifying and implementing energy efficiency opportunities in their facilities. Additionally, assistance will be provided on the analysis of city facilities that will be conducted to identify demand reduction projects with energy conservation measure alternatives.

**A.5) Financing Options/On-Bill Financing**

The Partnership will provide information regarding financing options, including On-Bill Financing, revolving EE funds, and other potential projects and financing instruments that can assist with the upfront costs of energy efficiency retrofits.

**Core Program Element B: Strategic Plan Support**

**B.1) Code Compliance Support**

The San Bernardino Regional Energy Partnership will encourage a culture of energy code compliance improvement and will develop various strategies across the partnering cities to improve compliance with building energy standards and appliance regulations. The partnership will conduct focused energy code training targeted to the San Bernardino region including workshops for municipal planning and building staff, building professionals, and contractors.

**B.2) Reach Code Support**

The partnership will work toward establishing meaningful CEC-approved Reach codes as part of its effort to add value to EE in alignment with the strategies stated in the Master

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PIP. This activity will follow the proposed path described in the Codes & Standards (C&S) PIP.

**B.3) Guiding Document(s) Support**

The San Bernardino Regional Energy Partnership objectives will include development and support of Energy Action Plans and Climate Action Plans to document baseline energy use and emissions, as well as establishing documentation in alignment with the strategies as described in the Master PIP. These baselines will be used to set and achieve emission reductions and energy savings. Individual city plans will be used to develop a regional energy savings plan.

**B.4) Financing for the community**

The San Bernardino Regional Energy Partnership will provide education and outreach programs for the partnership communities in alignment with the strategies as described in the Master PIP. The partnership will coordinate with any available community financing programs, including the existing Property Assessed Clean Energy (PACE) program, marketed as the HERO Program.

**B.5) Peer to Peer Support**

The San Bernardino Regional Energy Partnership will actively participate and support peer-to-peer collaboration through forums and best practice sharing with partnering cities and through the strategies as described in the Master PIP. This will expedite the process of learning curve of how partnership operates and increase the knowledge of EE to better serve the communities. The partnership will encourage the participating cities to attend training, access to information and exchange best practices with other cities.

**Core Program Element C: Core Program Coordination**

**C.1) Outreach & Education**

The partnership will establish a comprehensive Marketing Education & Outreach (ME&O) Plan that will be expanded to incorporate: deep retrofit strategies among the 14 member cities and their business communities including but not limited to Retro-Commissioning, Energy Upgrade California, educational workshops to assist cities in moving forward with energy savings projects, policies, codes, and ordinances; general awareness events and exhibits to publicize the partnership and its goals throughout the communities (including environmental fairs and expos); marketing EE programs through a variety of media channels including mailers, press releases, and quarterly e-newsletters; and special workshops, as well as co-branding and program leveraging throughout the 14 cities.

**C.2) Residential and Small Business Direct Install**

No Direct Install initiatives are planned at this time through SoCalGas. The partnership will promote outreach efforts to support and coordinate with the SoCalGas' and SCE's core programs and Third Party Programs for San Bernardino commercial and small business customers as well as leverage existing member cities chambers of commerce, bill mailing inserts, and municipal publications to distribute information and drive greater participation.

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**C.3) Third-party program coordination**

The partnership will actively support third party programs through the strategies as described in the Master PIP. The Partnership will continue to cultivate the relationship with both residential and commercial third party programs and deliver the message and venues to the City and the community as expressed in the Master PIP.

**C.4) Retrofits for ESA-qualified customers**

The partnership will support retrofits for those who qualify for this program through active outreach and marketing. The Partnership will invite Energy Savings Assistance (ESA) Program Managers to Partnership meetings to present the program offerings and assist Cities to reach out to the community through marketing and outreach events.

**C.5) Technical assistance for program management, training, audits, etc.**

The Partnership plans to utilize a portion of its resources to this particular activity. The Core Programs provided by SoCalGas and SCE will be utilized to reach their appropriate audience and will work continuously to identify other programs that may serve the constituents of the participating jurisdictions more effectively. These programs may include, but are not limited to: Savings by Design (SBD), Home Energy Efficiency Rebates (HEER), Water Heater Rebates, Express Efficiency, Retro-Commissioning, Upgrade California, Comprehensive Manufactured Home, Multi-family Energy Efficiency Rebate (MFEER) Program, Home Energy Efficiency Survey (HEES) Program, and ESA, Middle Income Direct Install (MIDI), etc. The Partnership will also coordinate with the SoCalREN programs.

**c) Non-incentive services**

The San Bernardino Regional Energy Partnership will leverage its portfolio of ME&O activities to deliver non-incentive services such as those listed below. These non-incentive services are designed to increase community enrollment in energy core programs and participation in SoCalGas and SCE services and resources:

- Account Executive/Manager support;
- Training at the SoCalGas' Energy Resource Center (ERC) and SCE's Energy Education Center in Irwindale;
- Speakers bureau;
- Limited giveaways such as opportunity drawings and EE Starter Kits, and free CFLs;
- Scheduling special events such as SCE's Operation Lamp Exchange;
- Marketing;
- Design and printing of brochures and other collateral materials; and
- Media/Press/Publicity support.

**d) Target audience**

The target audience consists of City and county staff, management and policymakers (elected officials), and residential and business customers in the San Bernardino region.



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**3. Program Element Rationale and Expected Outcome**

**a) Quantitative Baseline and Market Transformation Information**

By its nature, market transformation occurs as a result of numerous factors and programs, not single sub-programs. Therefore, all metrics and goals are proposed at the highest program level. Please refer to the quantitative baseline and market transformation discussion, presented in the overarching PIP section.

Program/Element	Baseline Metric		
	Metric A	Metric B	Metric C
Program/Element	N/A	N/A	N/A

**b) Market Transformation Information**

By its nature, market transformation occurs as a result of numerous factors and programs, not single sub-programs. Therefore, all metrics and goals are proposed at the highest program level. Please refer to the quantitative baseline and market transformation discussion, presented in the overarching PIP.

Program/Element	Market Transformation Planning Estimates
Program/Element	2015
Metric A	N/A
Metric B	N/A
Metric B	N/A
Etc.	N/A

**c) Statement of Compliance with Deep Retrofits Mandate for New and Expanded Partnerships**

The newly proposed SoCalGas and SCE partnership will have a special emphasis on Deep Retrofit targets, which will have the partnership demonstrate the installation of one or more measures from the following menu. A project may also be defined across IOU's (e.g., joint SoCalGas and SCE project):

HVAC solutions	Refrigeration solutions*
Targeted Advanced-technology Lighting solutions (i.e., LED)*	Water-Energy nexus solutions
Water Heating	RetroCommissioning
Combined electricity and gas measures	

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Process Solutions

\*Identifies electric measures which are applicable to SCE only and SoCalGas will not provide incentives for these measures.

**4. Other Program Element Attributes**

a) **Best Practices**

The San Bernardino Regional Energy Partnership will embody the best practices strategies described in the Master PIP.

b) **Innovation**

With local governments being well aware of the social and economic dynamics of their businesses and residents, institutional knowledge at both the individual and collaborative level will be leveraged. City officials will be recruited and utilized as advocates. City facilities will be enrolled into different energy programs. There will be periodic team meetings during which agencies can engage in peer-to-peer problem solving. Energy initiatives and commitment to addressing energy issues will be required to be incorporated into new and existing Energy Action Plans. Workshops, events and presentations will empower the communities and their local government with the knowledge needed to recognize concepts and benefits. The significant benefits of EE demand response (DR) and renewable resources will be the foundation for training focused on behavioral change and sustainable participation.

c) **Interagency coordination**

Through the participation of SoCalGas and SCE, all partners of the San Bernardino Associated Governments (SANBAG), a comprehensive and integrated approach to EE, natural gas efficiency, water efficiency as well as wastewater, storm water and potable water capital projects will be identified and developed ensuring that the municipalities are as energy efficient as possible. The San Bernardino Regional Energy Partnership through its local government and consulting network will encourage coordination with agencies and initiatives as noted within the Master PIP as well as with the participating IOUs, SCE and SoCalGas.

d) **Integrated/coordinated Demand Side Management**

The IOU's have identified Integrated Demand Side Management (IDSM) as an important priority. As a result they have proposed the establishment of a Statewide Integration Task Force (Task Force). Local Government partnerships will monitor the progress of the

Statewide IDSM efforts and work closely with the Task Force to identify comprehensive integration approaches and to implement best practices. See Master PIP.

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**e) Integration across resource types (energy, water, air quality, etc.)**

The partnership promotes comprehensive sustainability, including water conservation, solid waste management, and alternative mobility.

**f) Pilots**

No pilots are planned at this time through this partnership but the partnership will be available to promote emerging technologies.

**g) EM&V**

Not applicable to this program.

**5. Partnership Program Advancement of Strategic Plan Goals and Objectives:**

Although the Strategic Plan is in the process of being updated, the Partnership will target the existing Strategic Plan Objectives until the Strategic Plan, Local Government Chapter is updated.

**Table 6**

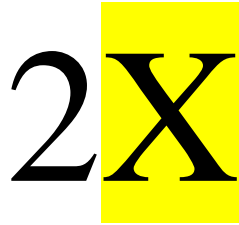
<b>Strategic Plan Strategy</b>	<b>Program Approach to Achieving Strategic Plan Goal</b>
1-1: Develop, adopt and implement model building energy codes (and/or other green codes) more stringent than Title 24's requirements, on both a mandatory and voluntary basis; adopt one or two additional tiers of increasing stringency.	Several jurisdictions have adopted green building codes. Training and information will be provided to cities about Title 24 and ways to encourage more stringent energy codes on a voluntary basis.
1-2: Establish expedited permitting and entitlement approval processes, fee structures and other incentives for green buildings and other above-code developments.	The Partnership will offer training and educational workshops for jurisdictions planning and building department staff regarding opportunities for expedited permitting and other incentives, green building codes and energy efficient design.
1-3: Develop, adopt and implement model point-of-sale and other point-of transactions relying on building ratings.	The potential for this will be evaluated.
1-4: Create assessment districts or other mechanisms so property owners can fund EE through city bonds and pay off on property taxes; develop other EE financing tools.	SANBAG has already developed a multi-million dollar regional Program, (HERO) for residents and businesses in San Bernardino County to implement energy efficient improvements using low-interest loans that would be repaid over time through annual tax payments. California law allows for local jurisdictions to enter into contractual assessments with property owners for such improvements.
1-5: Develop broad education program and peer-to-peer support to local governments to adopt and implement model reach codes.	The Partnership will work to enhance education and peer-to-peer support for local governments.

**2013-2015 Energy Efficiency Programs  
Local Government Partnership Program  
Program Implementation Plan**

<b>Strategic Plan Strategy</b>	<b>Program Approach to Achieving Strategic Plan Goal</b>
1-6: Link emission reductions from “reach” codes and programs to CARB’s AB 32 program	The potential for this will be evaluated.
2-2: Dramatically improve compliance with and enforcement of Title 24 building code, and of HVAC permitting and inspection requirements (including focus on peak load reductions in inland areas).	The Partnership will support the development of training and education programs.
2-3: Local inspectors and contractors hired by local governments shall meet the requirements of the energy component of their professional licensing (as such energy components are adopted).	The potential for this will be evaluated.
3-1: Adopt specific goals for efficiency of local government buildings	Various opportunities for improved efficiency, including environmentally preferred purchasing policies, and incentives will be shared with the cities.
3-2: Require commissioning for new buildings, and re-commissioning and retro-commissioning of existing buildings.	Energy efficiency upgrades and retro-commissioning of municipal facilities is a major goal.
3-4: Explore creation of line item in local governments’ budgets or other options that allow EE cost savings to be returned to the department and/or projects that provided the savings to fund additional efficiency.	The potential for this will be evaluated.
3-5: Develop innovation Incubator that competitively selects initiatives for inclusion in local government pilot projects.	The potential for this will be evaluated and explored with participating jurisdictions to see if it could be effective.
4-1: Local governments commit to clean energy/climate change leadership.	The potential for this will be evaluated.
4-2: Use local governments’ general plan energy and other elements to promote energy efficiency, sustainability and climate change.	Energy efficiency efforts will be integrated with climate action leadership.
4-4: Develop local projects that integrate EE/DSM/water/wastewater end use.	Training and educational opportunities to explore ways to promote energy efficiency, sustainability and greenhouse gas reduction through general plans and community planning will be sought.
4-5: Develop EE-related “carrots” and “sticks” using local zoning and development authority.	The potential for this will be evaluated.

## Attachment B

SCE and SoCalGas' North Orange  
County Cities Partnership (NOCC)



# North Orange County Cities Energy Leader Partnership

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1. **Program Name:** North Orange County Cities Energy Leader Partnership

2. **Projected Program Budget Table**

Energy Leader Partnership Program	Total Administrative Cost (Actual)	Total Marketing & Outreach Cost (Actual)	Total Incentive/Rebate Costs (Actual)	Total Direct Implementation (Actual)	Total Budget by Program (Actual)
North Orange County Cities Energy Leader Partnership	\$ 12,000	\$ 23,000	\$ 55,000	\$ 95,000	\$ 185,000

3. **Projected Program Gross Impacts Table**

Energy Leader Partnership Program	2015 EE Program Gross kWh Savings	2015 EE Program Gross kW Savings
North Orange County Cities Energy Leader Partnership	500,000	59

4. **Program Element Description and Expected Outcome**

Seven cities in North Orange County (Brea, Buena Park, Fullerton, La Habra, Orange, Placentia and La Palma) propose to form a joint Local Government Partnership called the North Orange County Cities Energy Leader Partnership (NOCC ELP) with Southern California Edison (SCE) and Southern California Gas Company (SCG).

The NOCC ELP Partnership cities were introduced to Local Government Partnerships by the City of Brea which has been an active participant in the Community Energy Partnership, a Local Government Partnership with SCE, Southern California Gas Company (SCG) and the Energy Coalition, since 2002. The City of Brea will move to the NOCC ELP Partnership upon formation. Brea will act as a mentor to the member cities in this newly formed partnership.

The City of Brea has maintained ongoing and active communication with the proposed cities through the North Orange County Cities Coalition (NOCCC), a collaboration of city managers who meet on a regular basis. Through this forum, Brea has secured interest and commitment to reducing energy consumption on behalf of this region by inspiring them with their successes and past experience.

The proposed North Orange County Cities Partnership forms a regional cluster of six cities in Northeast Orange County; four of which border Los Angeles County. This NOCC ELP

## North Orange County Cities Energy Leader Partnership

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represents a population of roughly half a million residents and over 80 square miles. The Table below illustrates the proposed cities, population, and land area.

**Table 2-1 City Population and Land Area**

City	Population	Land area (sq mi)
Brea	40,963	12.1
Buena Park	80,530	10.6
Fullerton	135,161	22.2
La Habra	60,239	7.3
Orange	136,416	23.4
Placentia	50,533	6.6
La Palma	15,568	1.8
<b>TOTAL</b>	<b>519,410</b>	<b>84.0</b>

The three core program elements are consistent with other statewide Local Government Partnerships: Government Facilities, Strategic Plan Activities, and Core Program Coordination. The program will implement SCE's Energy Leader Model and enhance the leadership role of cities in energy management. The Partnership will focus on achieving energy savings and behavioral change in the residential, nonresidential and municipal sectors. Through this framework, the partnership program supports local governments that are willing to commit to and sustain the appropriate level of participation and resources to effectively initiate programs that address the main issue areas for local government action that are identified in the California Long-Term Energy Efficiency Strategic Plan (CLTEESP or Strategic Plan).

The partnership will also emphasize deep retrofits through customized technical assistance offerings, a comprehensive approach to retrofits, and city staff training.

### **a) List of Program Elements**

The three core program elements are consistent with the Energy Leader Partnership Program (ELPP) Master PIP: Element A - Government Facilities; Element B - Strategic Plan Activities; and Element C - Core Program Coordination.

#### **Core Program Element A: Government Facilities**

This area will deliver energy savings. Every local government that participates in the partnership will achieve specified energy savings and greenhouse gas (GHG) reductions from the facilities and infrastructure that it manages through technology retrofits, operational improvements, and policy changes. Participating local governments will take advantage of partnership incentives for municipal facilities and, wherever possible, of eligible rebate, incentive and technical assistance programs offered by their serving utilities.

##### **A.1) Retrofit of Municipal Facilities**

The partnership will provide opportunities and funding for our Partner Cities to "lead by doing" by identifying opportunities for local governments to participate in comprehensive retrofits of municipal facilities.

These governments can leverage incentives offered through SCE and SCG core programs.



## **North Orange County Cities Energy Leader Partnership**

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The partnership will support city planning efforts throughout this process by:

- Identifying energy efficiency opportunities in municipal facility retrofit projects. The Partnership will build a comprehensive list of municipal retrofit projects and provide ongoing communication, training and technical assistance.
- Retrofitting municipal facilities, including pump optimization, lighting, and HVAC projects.
- Encouraging stricter EE standards for municipal new construction.
- Providing workforce education and training to city personnel to provide for long-term energy efficiency maintenance and upgrades.
- Enrolling municipal facilities into existing utility programs.
- Coordinating with the utilities' Emerging Technologies departments to offer test sites within city facilities.
- Coordinating advanced engineering audits to identify further opportunities for savings.
- Enrolling municipal facilities in our Partner Cities in the ENERGY STAR® Benchmarking Portfolio Manager Program.
- Supporting continued efforts for proper energy use and tracking, including sub-metering, building automation systems and utility management software.

City staff will be encouraged to participate in Building Operator Certificate training or similar training and will stay engaged throughout the retrofit process. Continued optimized operations and maintenance will be supported through the development of facility guidebooks. These operations and maintenance tools and practices will give city staff the ability to "continuously commission facilities" to ensure savings are sustained over time.

### **A.2) Retro-Commissioning (of buildings or clusters of buildings)**

The partnership will identify the potential for energy savings opportunities through the Retro-Commissioning (RCx) of municipal facilities within the partnership's Partner Cities. Building problems and energy waste can often be resolved by making the low-cost or no-cost adjustments identified by the Retro-commissioning process. The partnership will encourage any facility receiving enhanced technical assistance to also pursue RCx and apply for utility incentives in order to optimize building performance and reduce energy costs. The partnership will also assist in providing training and education to city employees on the benefits of RCx during any major retrofits of existing governmental buildings.

### **A.3) Integrating Demand Response into the audits**

The partnership plans a concerted effort to identify and perform successful comprehensive energy efficiency projects with member cities, and enrolling service accounts from each city in demand response programs. The partnership will provide integrated audits that are a combination of energy efficiency and demand response (DR), where applicable.

SCE's tiered incentive program requires cities to implement DR in order to move up to a higher incentive level. The partnership will encourage Partner Cities who are receiving energy efficiency audits for municipal facilities and implementing energy efficiency recommendations to participate in at least the basic level of demand response. This

## **North Orange County Cities Energy Leader Partnership**

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integration of DR and EE will encourage Partner Cities to exploit synergies and maximize potential energy savings.

### **A.4) Technical assistance for project management, training, audits, etc.**

Technical assistance is a key driver to encourage deeper retrofits. The partnership plans to assist with technical assistance to identify and initiate EE projects within municipal operations and provide customized requests.

The partnership will assist city government officials and staff in understanding, managing, and reducing their energy use and costs, and position Partner Cities as regional leaders in energy management practice. Assistance will be offered to designers, building inspectors, building engineers, employees and building occupants, and will include design assistance, plan review, Title 24 training, the audit process, technology review and building awareness. This assistance will be delivered by government or industry representatives, IOU Technical Staff, consultants, or another qualified source.

The partnership will also develop local government energy efficiency expertise. Faced with resource constraints, local governments often lack adequate resources to proactively act or respond to energy efficiency opportunities in their buildings or in community buildings. The partnership program will work with local governments to identify any resource constraints, and provide viable and cost effective utility solutions to develop expertise, including:

- Developing in-house capabilities (energy manager position) devoted to achieving all cost-effective energy efficiency for local government facilities and stimulating similar actions in the community;
- Building the capacity/expertise of a designated Team Leader to address and respond to energy efficiency opportunities within the city; and
- Educating employees through city staff workshops/information sessions.

### **A.5) Financing**

To overcome financial barriers, the partnership will encourage Partner Cities to take advantage of financing offerings available to them through IOU and other financing programs.

The Partnership will provide Partner Cities with information on the IOUs' On-Bill Financing Program for municipal facilities that install energy-efficient equipment or strategies. Financing and installation of equipment will be considered for partial or fully-extended repayment in the amount up to that offered through the applicable core program and will be included as a component line item of the monthly utility bill for repayment to the IOU.

In addition, the IOUs are launching a new nonresidential on-bill repayment pilot that is expected to begin in 2015. To the extent the pilot is available, the IOUs will also provide partners with information on this program.

The partnership will also work closely with its participants to foster a larger local government role in the development and implementation of innovative financing tools by

## **North Orange County Cities Energy Leader Partnership**

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embracing approaches such as Local PACE programs, Assessment District loans, and third party financing (e.g., PPAs, ESCOs).

The partnership will support exploring developing municipal revolving energy funds that provide a secure, sustainable, long-term funding source for municipal energy efficiency projects.

### **Core Program Element B: Strategic Plan Support**

The partnership will employ the following strategies in support of the Strategic Plan:

#### **B.1) Code Compliance Support**

The Strategic Plan concludes that significant attention must be focused on enforcing and strengthening local on-the-ground compliance with energy codes and standards. The partnership will support local government code compliance efforts as a key element to obtaining full savings from California's building and appliance energy code standards and will assist city building officials to gain a better understanding of new and existing energy codes.

Consistent and effective compliance, enforcement, and verification by local governments are essential parts of the overall effort. The partnership will emphasize multi-jurisdictional efforts which can be promoted through the partnership partner cities in order to take advantage of economies of scale that can be realized, particularly for outreach and training efforts.

#### **B.2) Reach Code Support**

The partnership will work toward establishing meaningful CEC-approved reach codes as part of its effort to add value to energy efficiency in alignment with the strategies stated in the ELPP Master PIP. This activity will follow the proposed path described in the Codes & Standards PIP.

The relevant codes and standards that will be addressed by the partnership program are primarily those related to residential and commercial buildings, both new and existing. The Strategic Plan calls for the coordination of local government building codes and development policies, requirements to be mandated by local governments when a significant renovation occurs or when a property is sold, and the development of model local government programs that exceed minimum State code requirements.

Through the partnership, local governments will commit to begin engaging in a good faith effort to develop "reach" codes and standards. They will also commit to coordinating with neighboring jurisdictions, professional and industry associations, and others in the development and implementation of the Reach codes.

### **B.3) Guiding Document(s) Support**

The NOCC Energy Leader Partnership objectives will include development of Energy Action Plans and Climate Action Plans to document baseline energy use and emissions, as well as establishing documentation in alignment with the strategies as described in the ELPP Master PIP (shown below). These baselines will be used to set and achieve emission reductions and energy savings. Individual city plans will be used to develop a regional energy savings plan.

The Strategic Plan calls for local governments to lead their communities with innovative programs for energy efficiency, sustainability, and climate change. The partnership will serve as a catalyst to help facilitate local government energy leadership, adoption, and implementation of an Action Plan that will move their community forward. Participating local governments will leverage their existing programs, interactions, and relationships in support of community-focused energy efficiency, demand response, and greenhouse gas (GHG) reduction programs with particular focus on socio-economically diverse populations. These activities will entail close collaboration with the serving utilities in educating and informing citizens about opportunities for participation in utility sponsored programs.

### **B.4) Financing for the community**

The Strategic Plan recognizes the need for new and innovative financing solutions to accelerate investments in energy efficiency and cleaner energy technologies for both residential and commercial properties. See Section A.5 for a description of how this partnership will provide financing opportunities for energy efficiency projects.

### **B.5) Peer-to-Peer Support**

Through its peer-to-peer strategy, the partnership supports the goals of the Strategic Plan by providing a support network through which Team Leaders from Partner Cities can have access to information, exchange information, and attend training workshops, all in an effort to increase in-house EE knowledge base levels to enable them to better serve their residents and businesses. Peer-to-peer support has been the cornerstone of the partnership program's ability to effectively stimulate the sharing of ideas and best practices among partner cities.

Through the partnership the following will be facilitated:

- *Partner-to-Partner Dialogue*

The partnership Team Leaders have the unique advantage of providing one another with peer-to-peer leadership that would not normally exist without the partnership. Through the partnership, partner cities are able to leverage the experience and expertise of fellow peer cities to increase awareness and participation levels and positively influence their own local government. Through regular Team Leaders Meetings and Webinars, Team Leaders are able to engage in peer-to-peer dialogue, support each other with local policy and code advancement, and share best practices and technical knowledge.
- *Partner-to-Partner Sharing*

Cities have expressed interest in sharing details about municipal projects and successes. The Partnership can facilitate easy sharing of information through a searchable webpage that lists municipal energy efficiency project details and energy

## **North Orange County Cities Energy Leader Partnership**

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savings totals. The project will leverage free program applications (e.g., GoogleMaps) to provide more flexibility for updating information.

- Some cities are in the process of implementing a Community Energy Efficiency Project Management System (CEEPMS). This program is built into a city's existing on-line permitting system to identify projects with energy efficiency potential and educate the consumer about the potential energy efficiency opportunity.

The partnership will also connect to new partnerships, and local governments participating in other cutting-edge IOU partnership programs across the state. The partnership will leverage opportunities for sharing and advancing city leadership through sharing of best practices and models with other Partnership cities and implementers through Peer-to-Peer meetings.

### **Core Program Element C: Core Program Coordination**

The partnership has been developed in response to the need to integrate statewide energy and greenhouse goals into effective local action. The partnership's objective in this area is to develop effective partnerships between local governments and utilities that support the development of long-term, sustainable energy and GHG reduction programs in support of the California Energy Action Plan and California Global Warming Solutions Act (AB 32). The Partnership supports the key areas of the Strategic Plan that helps local governments define individualized energy reduction goals and Action Plans through very practical, flexible, and straightforward steps.

#### **C.1) Outreach & Education**

The partnership will utilize existing resources offered by the city or utility for an efficient and effective campaign. Energy efficiency will be framed within the context of climate change and the city's goals to reduce greenhouse gas emissions as outlined in AB 32.

The partnership will provide marketing and outreach, education and training and community sweeps to connect the community with opportunities to take action to save energy, money and the environment and increase the viability of small businesses. In addition, the program will act as a clearinghouse for all demand side management (DSM) offerings, delivering information on demand response, self-generation, and low income programs, California Alternative Rate for Energy (CARE), the California Solar Initiative (CSI) and other DSM programs.

The partnership aims to promote the Energy Upgrade California (EUC) program in 2015 through extensive collaboration with all state-wide and local EUC stakeholders to deliver comprehensive marketing and outreach, modeling the successes of local and regional efforts. The partnership will host workforce trainings and homeowner workshops within partner cities. The goal is to increase the number of local contractors trained within partner cities and to increase the number of community members participating in Energy Upgrade California. The partnership will coordinate with SCE core programs to provide support, outreach and co-branded messaging to community members for program engagement, education and to increase participation. Residential direct install is not currently offered except through income qualified programs. Partner cities have the opportunity to lead in SCE's outreach and messaging to their small business customers in a leadership role.

### **C.3) Third-party program coordination**

The partnership will coordinate with third party programs and associations in order to realize the benefits of being part of a broad professional network, such as resource sharing and establishment of best practices. The partnership intends to involve interested special districts (e.g., water, fire, and school districts) and coordinate with local building and trade professionals and organizations and other green business and sustainability organizations to develop an integrated, comprehensive message. See the ELPP Master PIP regarding activities that provide access to energy offerings.

### **C.4) Retrofits for LIEE-qualified customers**

The partnership will promote retrofits as an integrated approach to energy consumption and reduction, increasing awareness of energy efficiency and demand response for qualified Low-Income Energy Efficiency (LIEE) customers. Coordinating with the Multi-family Energy Efficiency Program will provide energy efficiency retrofits for low income customers. This implementation of demand side management (DSM) strategies will also be coordinated with the LIEE Program and will support progress towards local and statewide sustainability goals.

### **C.5) Technical assistance for program management, training, audits, etc.**

The partnership will assist our partner city staff, residents, and businesses in understanding, managing, and reducing their energy use and costs, and position partner cities as regional leaders in energy management practice by providing comprehensive technical, planning, marketing and implementation assistance.

The partnership will use utility resources to support partner cities' capacity for smart energy management. This includes encouraging and enlisting city staff to leverage utility resources.

## **b) Overview**

See Section 4.

## **c) Non-incentive services**

The partnership will provide numerous non-incentive services, including:

- Municipal Energy Action support;
- Peer-to-Peer Leadership;
- Energy Efficiency Trainings and Workshops;
- Energy Efficiency Programming for city marketing and outreach efforts;
- Marketing, Education and Outreach (ME&O);
- Sharing of Community Success Stories;
- Information, Education and Funneling or core and third-party programs; and
- Community Energy Champion Recognition.

## **North Orange County Cities Energy Leader Partnership**

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The partnership will build a ME&O portfolio of activities to increase community enrollment in energy core programs. The portfolio will include other SCE services, resources, and assets brought to support the ME&O Plan, including:

- Mobile Energy Unit;
- SCE’s Account Manager/Executive support;
- SCE’s Energy Education Center training;
- SCE’s Speakers Bureau;
- Providing limited giveaways (*e.g.*, opportunity drawings and free CFLs); and
- Providing marketing, design, and printing of brochures and other collateral materials.

### **d) Target audience**

The target audience for this partnership includes City and county staff, management and policymakers (elected officials), and residential and business customers in the North Orange County Region. The Partnership will also target special districts in partnering cities, such as water districts and school districts.

### **e) Implementation**

In addition to the strategies and coordination as described in the ELPP Master PIP (shown below):

Program cost efficiency will be captured throughout our partner cities by maximizing replicable program elements, leveraging resources and staff support from each partner as defined in our participation model, and implementing initiatives that create demonstrated permanent and persistent energy savings.

The partnership’s strategies include an integrated approach to energy consumption and reduction, increasing awareness of energy efficiency, demand response, Low-Income Energy Efficiency, California Alternative Rates for Energy Program, Self-Generation Incentive Program, and California’s Solar Initiative.

### **Sub-Element A1 – Government Facilities Retrofits**

Each local government participating in the NOCC ELP Partnership as a partner with SCE will undertake to develop and implement municipal clean energy projects within its respective jurisdiction. The partnership will provide opportunities and funding for partner cities to “lead by doing” by identifying opportunities for local governments to participate in comprehensive, deep-energy retrofits of municipal facilities. These governments can leverage incentives offered through Southern California Edison’s ELP program. The cities’ involvement in the partnership will allow them to better target and leverage funds to achieve cost-effective energy savings.

The partnership will support city planning efforts throughout this process by:

- Identifying energy efficiency in municipal facility retrofit projects. The Partnership will build a comprehensive list of municipal retrofit projects from ongoing communication, training and technical assistance;

## **North Orange County Cities Energy Leader Partnership**

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- Retrofits to municipal facilities will consist primarily of pump optimization, lighting and controls, HVAC and controls along with various measures identified through SCE Partnership audits;
- Encouraging stricter energy efficiency standards for municipal new construction;
- Providing workforce education and training to city personnel to provide for long-term energy efficiency maintenance and upgrades;
- Coordinating with the utilities' Emerging Technologies departments to offer test sites within city facilities;
- Coordinating integrated engineering audits to identify further opportunities for deeper energy efficiency retrofits;
- Enrolling municipal facilities in ENERGY STAR's Benchmarking Portfolio Manager Program for ongoing tracking and superior energy management.

### **Sub-Element A2 – Retro-commissioning (RCx) &/or Monitoring-Based Commissioning (MBx)**

Candidate facilities for RCx and/or MBx will be identified through the development process that will align with SCE's Core Program offering to ensure consistency and will be supported with technical assistance (see Sub-Element A4 – Technical Assistance). This process consists of performing field-based functional tests at the building system and/or subsystem level, including on-site equipment testing, monitoring and/or verifying proper operation, and calibration of a sample of the systems, and assessing potential projects for technical feasibility and cost-effectiveness. Sub-Element A1, Sub-Element A2 will be coordinated with Sub-Element B5 – Peer-to-Peer Support.

### **Sub-Element A3 – Integrated Demand Response**

The Integrated DR development process will also identify eligible non-emergency municipal facilities and functions — such as office buildings where lighting and/or HVAC could be interrupted or reduced without risk to public health and safety — that could participate in SCE DR programs. LGPs will also be encouraged to identify self-generation opportunities, especially for cleaner technologies such as solar PV, advanced micro-turbines, and fuel cells. See Core Program Element C (Core Program Coordination) for more information about how the NOCC ELP Partnership will coordinate with the utilities' Self Generation Incentive Program (SGIP), and Core Program Element B (Strategic Planning Support) for information about coordination with other types of RE and SG programs.

### **Sub-Element A4 – Technical Assistance**

Technical assistance starts with obtaining a list of all of the municipal facilities of each participating local government with their account name (e.g., city/county department), address, type of municipal function being performed at that location, age of the building (known or estimated), size in square feet, and any other readily compiled, relevant information. The list is then matched with energy use to identify the energy use of the facility and prioritize high-potential opportunities.



## **North Orange County Cities Energy Leader Partnership**

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SCE Business Customer Division (BCD) Representatives have met with all LGPs to help compile lists of potential retrofits and request information about each facility's situation. Some preliminary energy assessments have been conducted to identify highest-priority projects for implementation upon CPUC approval of the NOCC Partnership.

SCE will provide expanded professional services to ensure end-to-end project support to local government partners.

Element A-4 will be coordinated with Sub-Element B-5 Peer-to-Peer Support to share information with other local governments.

### **Sub-Element A5 – On-Bill Financing**

See discussion above in Section 4.b. (Overview, Incentives, Sub-Element A5) for a description of how the NOCC ELP Partnership will approach On-Bill Financing.

## **5. Program Element Rationale and Expected Outcome**

### **a) Quantitative Baseline and Market Transformation Information**

By its nature, market transformation occurs as a result of numerous factors and programs, not single sub-programs. Therefore, all metrics and goals are proposed at the highest program level. Please refer to the quantitative baseline and market transformation discussion, presented in the overall program PIP.

### **b) Market Transformation Information**

By its nature, market transformation occurs as a result of numerous factors and programs, not single sub-programs. Therefore, all metrics and goals are proposed at the highest program level. Please refer to the quantitative baseline and market transformation discussion, presented in the overall program PIP (below).

### **c) Program Design to Overcome Barriers**

The Cities that form the NOCC Regional Energy Leader Partnership will have barriers consistent with those identified in the ELPP Master PIP (shown below), and will employ the same strategies to overcome them, as described in the ELPP Master PIP. However, a few barriers and strategies that are most pertinent to the NOCC ELP Partnership NOCC ELP Partnership are identified below.

*Economy.* Many cities are beginning to recover economically however remain cautious prioritizing fiscal commitments. It may be difficult to convince decision makers that investing in energy efficiency is the prudent thing for them to do.

The partnership will utilize strategies to include cost/benefit analysis for all suggested or identified projects to demonstrate long-term benefits and pay-backs. The partnership will encourage partner cities to find viable and cost effective solutions such as taking advantage of on-bill financing, and identifying other sources of funding such as CEC funding and federal funding.

## North Orange County Cities Energy Leader Partnership

*Lack of Access to Financing/Resources.* The partnership will work with local governments to access on-bill financing, and encourage other community financing options to ease the adoption of energy efficiency in communities.

*End User Attitudes Toward Energy Efficiency.* Over the course of the past funding cycle, the partnership observed a gradual acceptance of new energy efficient technology and utility programs. However, complete market transformation has not yet been achieved in our partner cities. As a trusted entity, the partnership will continue to build upon our history of effective marketing and outreach strategies and established relationships with local governments and key community stakeholders.

*Cost of Obtaining and Processing Information.* Local governments are often overwhelmed on a day-to-day basis with obtaining and processing disparate information from different channels on an individual basis. The partnership plans to address this barrier through our peer-to-peer support network of Team Leaders from each partner city. Through this vehicle, the NOCC is able to provide a forum for partnership Team Leaders to facilitate the sharing of best practices and information processing strategies.

### d) Quantitative Program Objectives

**Table 5**

<b>Program/Element</b>	<b>Program Target by 2015</b>
Target #1 Municipal Retrofits (kWh)	See Section 2
Target #2 Municipal Retrofits (kW)	See Section 3
Target #3 Number of Technical Assistance Audits	5
Target #4 Number of Ordinances, Codes, etc.	0
Target #5 Number of ME&O events	3

## 6. Other Program Element Attributes

### a) Best Practices

The NOCC Energy Leader Partnership will embody the best practices strategies described below.

<b>Primary Barriers/Program Challenges</b>	<b>Program Best Practices</b>
Insufficient technical and financial resources	<i>One-stop Shopping</i> - Provides comprehensive bundle of technical, economic, marketing and implementation assistance through implementing partner.
First cost of EE investments	<i>Financing</i> - On-bill financing, other low interest energy loans, possible

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Primary Barriers/Program Challenges	Program Best Practices
	establishment of self-replenishing energy efficiency/savings funds, PACE
Incomplete implementation (due to adoption of aggressive policies & goals without a sound implementation & financing plan)	<i>Course Corrections</i> - Mechanism for constant tracking, monitoring and review of program results vs. challenges, allowing sufficient time for course corrections
Insufficient motivation	<i>Comprehensive Benefits</i> – Combines measure incentives with funding support for ME&O activities that are very important to local governments.
Lost opportunities	<i>Comprehensive Strategies</i> – Comprehensive whole portfolio, building and facility approaches minimize lost EE and DR opportunities by municipal facilities, while the companion ME&O strategy leverages the participating local governments’ efforts to encourage residents and business to also become energy efficient.

### **b) Innovation**

City officials will be recruited and utilized as advocates. City facilities will be enrolled into different energy programs. There will be periodic team meetings during which agencies can engage in peer to peer problem solving. Energy initiatives and commitment to addressing energy issues will be required to be incorporated into new and existing Energy Action Plans. Workshops, events and presentations will empower the communities and their local government with the knowledge needed to recognize concepts and benefits. The significant benefits of energy efficiency, demand response and renewable resources will be the foundation for training focused on behavioral change and sustainable participation.

### **c) Interagency coordination**

Through the participation of Southern California Gas, a comprehensive and integrated approach to energy efficiency, natural gas efficiency, water efficiency as well as wastewater, storm water and potable water capital projects will be identified and developed ensuring that the municipalities are as energy efficient as possible. The NOCC Energy Leader Partnership through its local government and consulting network will encourage coordination with agencies and initiatives as noted within the ELPP Master PIP (shown below) as well as with the participating IOUs, SCE and SCG.

### **d) Integrated/coordinated Demand Side Management**

The IOUs have identified Integrated Demand Side Management (IDSM) as an important priority. As a result they have proposed the establishment of a Statewide Integration Task Force (Task Force). SCE’s local government partnerships will monitor the progress of the

## **North Orange County Cities Energy Leader Partnership**

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statewide IDSM efforts and work closely with the Task Force to identify comprehensive integration approaches and to implement best practices.

The integration of demand side resources is critical to realizing the State's long-term energy goals and objectives. The partnership strives to minimize lost opportunities that accrue from the disparate delivery of energy services. As a core implementation strategy, the partnership adopts an integrated approach that leverages the synergies and economies of scale that exist from the complementary implementation of both energy efficiency and demand response resources, along with promoting awareness and increasing knowledge of LIEE, renewables, and self-generation.

The NOCC Energy Leader Partnership program plans include identifying and enrolling municipal service accounts from each city in demand response programs in alignment with the Energy Leader Partnership model and the ELPP Master PIP.

In addition, the LGPs will use an integrated approach, encouraging participation in DR, CSI, and SGIP programs in order to achieve coordinated delivery of DSM options. Although the funding for integration will come from the dedicated funding source for each integrated measure, SCE will make this transparent to the local government and its constituents.

Some LGPs will achieve integration of all elements, while others may only integrate a few. The integrated elements include:

- Integrated energy audits will be offered to government facilities that show savings potential and a willingness to commit the additional time and financial investments, while standard EE audits will be offered to all other program participants;
- Emerging Technologies and CEC-PIER collaboration is expected to include pilot projects and market acceleration assistance for market-ready products in the general categories of day lighting, lighting, HVAC, controls, and building envelope improvements;
- Commissioning and retro-commissioning services will continue being offered to segment customers; and
- DR opportunities will be targeted in larger facilities, particularly as part of monitoring-based retro-commissioning efforts where controls to facilitate DR efforts would be installed.

### **e) Integration across resource types (energy, water, air quality, etc.)**

The partnership promotes comprehensive sustainability, including water conservation, solid waste management, and alternative mobility. A key focus of the partnership will be assisting our local government partners in identifying and exploiting cost-effective opportunities for integration with other resource areas including water, solid waste, and air quality around climate action and AB 32.

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**f) Pilots**

No pilots are planned through this partnership but the partnership will be available to promote emerging technologies.

**g) EM&V**

See the ELPP Program Overview SCE-13-L-002.

# North Orange County Cities Energy Leader Partnership

## 7. Partnership Program Advancement of Strategic Plan Goals and Objectives:

**Table 6**

Strategic Plan Strategy	The Partnership’s Approach to Achieving Strategic Plan Goal
<ul style="list-style-type: none"> <li>1-1: Develop, adopt and implement model building energy codes (and/or other green codes) more stringent than Title 24’s requirements, on both a mandatory and voluntary basis; adopt one or two additional tiers of increasing stringency.</li> </ul>	<ul style="list-style-type: none"> <li>The partnership will investigate development of a Municipal Forum (Forum) consisting of partner representatives for the purpose of establishing common goals for the region. The Forum will address strategies for affecting codes, standards and incentives; review best practices for exceeding current Title 24 standards; and provide expert consultation to assist cities with their own planning and implementation. The partnership will actively promote and achieve adoption of Reach codes with the Partnership cities.</li> </ul>
<ul style="list-style-type: none"> <li>1-2: Establish expedited permitting and entitlement approval processes, fee structures and other incentives for green buildings and other above-code developments.</li> </ul>	<ul style="list-style-type: none"> <li>Partner cities may implement expedited permitting and other incentives for green building projects. The partnership will allow for joint adoption by other partnership partners.</li> </ul>
<ul style="list-style-type: none"> <li>1-3: Develop, adopt and implement model point-of-sale and other point-of transactions relying on building ratings.</li> </ul>	<ul style="list-style-type: none"> <li>The partnership will provide technical support and coordinate the joint development and adoption of model multi-jurisdiction point of sale and point of permit requirements related to increased energy efficiency in the partnership partner cities.</li> </ul>
<ul style="list-style-type: none"> <li>1-4: Create assessment districts or other mechanisms so property owners can fund EE through city bonds and pay off on property taxes; develop other EE financing tools.</li> </ul>	<ul style="list-style-type: none"> <li>The partnership will assist in the adoption of PACE programs in Partnership partner cities along with adoption of other appropriate innovative EE financing approaches.</li> </ul>
<ul style="list-style-type: none"> <li>1-5: Develop broad education program and peer-to-peer support to local government to adopt and implement model reach codes.</li> </ul>	<ul style="list-style-type: none"> <li>The Partnership will enlist the leadership cities within the partnership as mentors for development and adoption of Reach codes in the other Partnership cities.</li> </ul>

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Strategic Plan Strategy	The Partnership's Approach to Achieving Strategic Plan Goal
<ul style="list-style-type: none"> <li>1-6: Link emission reductions from "reach" codes and programs to CARB's AB 32 program.</li> </ul>	<ul style="list-style-type: none"> <li>The Partnership will conduct training of City managers, policymakers, business owners, community leaders and others to explain their respective roles in implementing AB 32 and the important role of energy efficiency in achieving these aggressive greenhouse gas reduction targets. Each partnership partner city will develop and adopt an Energy and Climate Action Plan that will link policy and program actions being taken within their community to specific AB 32 goals and targets.</li> </ul>
<ul style="list-style-type: none"> <li>2-2: Dramatically improve compliance with and enforcement of Title 24 building code, and of HVAC permitting and inspection requirements (including focus on peak load reductions in inland areas).</li> </ul>	<ul style="list-style-type: none"> <li>Through leveraging of expertise and resources within the Partnership (outreach, training, technical assistance, etc.) multi-jurisdictional efforts will be implemented to increase the rate of Title 24 compliance.</li> </ul>
<ul style="list-style-type: none"> <li>2-3: Local inspectors and contractors hired by local governments shall meet the requirements of the energy component of their professional licensing (as such energy components are adopted).</li> </ul>	<ul style="list-style-type: none"> <li>See discussion under 1-1 above.</li> </ul>
<ul style="list-style-type: none"> <li>3-1: Adopt specific goals for efficiency of local government buildings, including:</li> </ul>	<ul style="list-style-type: none"> <li>The partnership partner cities will commit up to a 10% reduction in energy use within qualifying municipal buildings as well as work to adopt a LEED requirement for new government buildings.</li> </ul>
<ul style="list-style-type: none"> <li>3-2: Require commissioning for new buildings, and re-commissioning and retro-commissioning of existing buildings.</li> </ul>	<ul style="list-style-type: none"> <li>The partnership will assist in a joint analysis and development of joint recommendations by the partner cities into the feasibility of commissioning requirements for new buildings and retro-commissioning requirements for existing buildings, as applicable.</li> </ul>

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Strategic Plan Strategy	The Partnership's Approach to Achieving Strategic Plan Goal
<ul style="list-style-type: none"> <li>3-4: Explore creation of line item in local government budgets or other options that allow EE cost savings to be returned to the department and/or projects that provided the savings to fund additional efficiency.</li> </ul>	<ul style="list-style-type: none"> <li>The Partnership will assist in a joint analysis and development of joint recommendations by the partner cities into the feasibility of modified budgeting approaches to allow EE cost savings to be returned to the department and/or projects that generate the savings.</li> </ul>
<ul style="list-style-type: none"> <li>3-5: Develop innovation Incubator that competitively selects initiatives for inclusion in local government pilot projects.</li> </ul>	<ul style="list-style-type: none"> <li>The Partnership will emphasize creativity by our Partners to develop innovative local government pilots.</li> </ul>
<ul style="list-style-type: none"> <li>4-1: Local governments commit to clean energy/climate change leadership.</li> </ul>	<ul style="list-style-type: none"> <li>Each partnership partner will develop and adopt an Energy and Climate Change Action Plan. Each Partnership partner city will commit to supporting a community-focused effort related to energy efficiency, demand response and greenhouse gas reduction programs with particular emphasis on socio-economically diverse populations.</li> </ul>
<ul style="list-style-type: none"> <li>4-2: Use local governments' general plan energy and other elements to promote energy efficiency, sustainability, and climate change.</li> </ul>	<ul style="list-style-type: none"> <li>The partnership envisions facilitating a peer-to-peer effort that allows each governmental entity to leverage the knowledge and experience of the others and take a more integrated approach to overall energy savings and greenhouse gas reduction through its Municipal Forum (see discussion under 1-1 above). The partnership will draw upon the experiences from the partner cities to identify generic modifications to General Plan elements that promote community sustainability.</li> </ul>
<ul style="list-style-type: none"> <li>4-4: Develop local projects that integrate EE/DSM/water/wastewater end use.</li> </ul>	<ul style="list-style-type: none"> <li>The Partnership will assist in the identification and preliminary concept development of integrated resource projects within the partner cities.</li> </ul>



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Strategic Plan Strategy	The Partnership’s Approach to Achieving Strategic Plan Goal
<ul style="list-style-type: none"> <li>4-5: Develop EE-related “carrots” and “sticks” using local zoning and development authority.</li> </ul>	<ul style="list-style-type: none"> <li>The partnership will help compile and disseminate examples of energy efficiency related requirements and incentives within local zoning and land-use planning codes/policies for joint consideration by the partner cities.</li> </ul>

### 8. Deep Energy Retrofits:

Pursuant to D.12-05-015, the IOUs are required to demonstrate that new partnerships introduced after 2012 adhere to deep retrofit criteria. Per the language developed in collaboration with the CPUC’s Energy Division as summarized in SCE’s 2013-2104 Master ELP PIP, partnerships must incorporate one or more measures from Table 7 below to demonstrate compliance with this deep retrofit requirement. A project may also be defined across IOUs and electric and gas sectors (e.g., joint SoCalGas and SCE project).

Deep retrofit requirements surrounding partnership expansions (new partner or partnership), shall be considered satisfied when the partner or partnership incorporates one or more measures from Table 7 below. The deep retrofit requirements are triggered when: a) new partnerships are introduced, or b) one or more cities are added to an existing partnership. An exception shall be granted in cases where SCE demonstrates that the new partner addition can be fully accommodated by the partnership’s existing funding allocation as provided by the budget within the respective PIP; and therefore would not require a fund shift or reliance on the ELP Reserve Fund. In this instance (i.e., if a partnership adds a new city without increasing the partnership budget), the city is not required to meet the deep retrofit criteria, but must update the PIP through the PIP addendum process and communicate with the PRG, as described above.

**Table 7: Mid-Cycle Partner/Partnership Deep Retrofit Criteria Qualifying Measure**

HVAC solutions	Refrigeration solutions
Targeted advanced technology lighting solutions (i.e., LED)	Water-energy nexus solutions
Combined electricity and gas measures	Retro-commissioning
Process solutions (e.g., chillers, blowers, boilers, storage tanks)	

Deep energy retrofits projects proposed by the NOCC Partnerships meet the deep energy retrofit criteria and include: water system pump replacement and system optimization, LED retrofit of city-owned streetlights, lighting controls, energy management system controls for HVAC and HVAC replacement. These measures are currently identified as potential projects the partner cities are committed to pursue under the Partnership direction where advanced audits, technical and professional assistance and program incentives will develop and drive the approval and completion of these projects. Five of the seven cities operate

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water departments which typically hold substantial energy savings opportunities for pump replacement and water system optimization.

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1. **Program Name:** North Orange County Cities  
**Program ID:** SCG 3801  
**Program Type:** Local Government Partnership

2. **Program Element Description and Implementation Plan**

a) **List of program elements:**

The three core program elements are similar to those identified in the Master Program Implementation Plan (PIP):

- Element A - Core Program - Government Facilities,
- Element B - Strategic Plan Activities, and;
- Element C - Core Program Coordination.

b) **Overview:**

The North Orange County Cities (NOCC) of Brea, Buena Park, Fullerton, La Habra, Orange, Placentia and La Palma propose to form an Energy Efficiency (EE) Partnership with Southern California Gas Company (SoCalGas) and Southern California Edison (SCE). This cluster of cities represents a population of nearly half a million residents. These communities share similar environmental challenges, economic challenges and opportunities, and diverse cultures.

The three core program elements are consistent with other state-wide Local Government Partnerships: Government Facilities, Strategic Plan Activities, and Core Program Coordination. The Partnership will focus on achieving EE through SoCalGas core programs and behavioral change in the residential, non-residential and municipal sectors. Through this framework, the partnership program supports local governments that are willing to commit to and sustain the appropriate level of participation and resources to effectively initiate programs that address the main issue areas for local government action that are identified in the California Long-Term Energy Efficiency Strategic Plan (CLEESP).

**Core Program Element A - Government Facilities**

**A.1. Retrofit of county and municipal facilities**

The Partnership will identify comprehensive EE deep retrofits in municipal facilities which will be funneled to SoCalGas rebate and incentive programs. Potential opportunities for energy savings through deep retrofits include but are not limited to projects which combine two of the following: HVAC, Controls, Retro Commissioning, hot water heating, lighting, vending machines, and computer networks. The partnership will work toward a savings target of 10,000 therms in municipal facilities which will be captured in the SoCalGas core programs.

**A.2. Retro-commissioning (of buildings and clusters of buildings)**

The cities are including this means of achieving significant energy savings in their

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plans. See A.1. above.

**A.3. Integrating Demand Response into the audits**

SoCalGas will coordinate with SCE to help promote participation in demand response programs. Integrated EE/DR audits will be conducted in eligible facilities as needed.

**A.4. Technical Assistance for project management, training, audits, etc.**

Each partnership has a specific budget for each of these activities.

**A.5. On-Bill Financing (OBF)**

Cities in the partnership will be encouraged to maximize the use of OBF to the extent that funding is available by the utility.

**Core Program Element B - Strategic Plan Support**

**B.1. Code Compliance Support**

The Partnership will support the individual partner cities as they examine ways of increasing compliance with existing codes. Increased enforcement can result in substantial energy savings and greenhouse gas (GHG) emissions. The Partnership will provide training, technical assistance, and additional support from SoCalGas' Codes and Standards (C&S) Program to build local government capacity to address code compliance issues in coordination with SCE.

**B.2. Reach Code**

The partnership will explore establishing meaningful CEC-approved Reach codes as part of its effort to add value to EE in alignment with the strategies stated in the Master PIP. This activity will follow the proposed path described in the Codes & Standards PIP.

**B.3. Guiding Document(s) Support**

The North Orange County Cities Partnership will develop a Strategic Energy Plan that includes long- and short-term energy and sustainability objectives in line with the adopted Strategic Plan and the Strategic Menu. The Partnership will make available any documents it develops that support the execution of its partnership activities and will participate in Peer-to-Peer sharing.

**B.4. Financing for the community**

The city will not be in a position to offer such financing. However, it is aware of the opportunities for financing provided by AB 811 and will explore the possibilities it represents to the partnership.

**B.5. Peer to Peer Support**

The Partnership will participate in SoCalGas and SCE sponsored Peer-to-Peer events.

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**Core Program Element C - Core Program Coordination**

**C.1. Outreach and Education**

The partnership has specifically allocated a portion of its budget to outreach and education. Some cities already have a monthly newsletter which goes out to every resident which cities will use to integrate EE messaging to influence residents to become more energy-wise and to participate in EE programs. The Partners will integrate EE messaging into their web sites and outreach tools.

**C.2. Residential and Small Business Direct Install**

There are no activities planned for direct install in homes and businesses at through the partnership this time by SCG . However, outreach will be done in the community to create awareness of energy services and programs as mentioned in C.1.

**C.3. Third-party Program Coordination**

The Partnership will execute community events appropriate for a third party contractors to execute program offerings.

**C.4. Retrofits for just-above ESA-qualified customers.**

The Partnership will coordinate with the income qualified programs to address the needs of the communities.

**C.5. Technical assistance for program management, training, audits**

The partnership will provide training and information to the city and its community and will coordinate technical assistance, from other programs as described in the Master PIP.

**c) Non-incentive services**

The partnership will build Marketing, Education & Outreach (ME&O) portfolio of activities to increase community enrollment in energy core programs. The portfolio will include other SoCalGas services, resources, and assets brought to support the ME&O Plan, including:

- SoCalGas' Account Manager/Executive support;
- SoCalGas' Energy Resource Center (ERC) training;
- Providing limited giveaways (*for example*, opportunity drawings and energy kits); and
- Providing marketing, design, and printing of brochures and other collateral materials

**d) Target audience**

- City facilities, city and county staff and management, and policymakers (elected officials);

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- Other regional governmental agencies that are not direct participants in the partnership; and
- Residential and business customers.

**3. Program Element Rationale and Expected Outcome**

**a) Quantitative Baseline and Market Transformation Information**

	Baseline Metric		
	Metric A	Metric B	Metric C
Program/Element	N/A	N/A	N/A

Refer to the overarching PIP section

**b) Market Transformation Information**

	Market Transformation Planning Estimates
Program/Element	2015
Metric A	N/A
Metric B	N/A
Metric B	N/A
Etc.	N/A

Refer to the overarching PIP section

**c) Program Design to Overcome Barriers**

In this Partnership, the barriers and strategies to overcome them are the traditional resource barriers of expertise and funding as outlined in the Master PIP.

**d) Statement of Compliance with Deep Retrofits Mandate for New and Expanded Partnerships**

The newly proposed SoCalGas and SCE partnership will have a special emphasis on Deep Retrofit targets, which will have the partnership demonstrate the installation of one or more measures from the following menu A project may also be defined across IOU's (e.g., joint SoCalGas and SCE project):

HVAC solutions	Refrigeration solutions*
Targeted Advanced-technology Lighting solutions (i.e., LED)*	Water-Energy nexus solutions
Water Heating	Retro Commissioning
Combined electricity and gas measures	
Process Solutions	

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\*Identifies electric measures which are applicable to SCE only and SoCalGas will not provide incentives for these measures.

**4. Other Program Element Attributes**

a) **Best Practices**

Same as outlined in the Master PIP.

b) **Innovation**

The partnership will collaborate with its municipal participants, including school districts and special districts, to develop renewable energy strategies for reducing energy costs and improving energy efficiency. The partnership plan calls for a heavy emphasis on community events in order to:

- Exhibit EE programs and practices;
- Conduct energy code training;
- Promote whole-building performance to get better space conditioning;
- Coordinate emerging “green” or sustainability standards; and
- Encourage the community to take full advantage of SoCalGas’ core programs.

c) **Interagency Coordination**

An objective for 2015 and beyond is to leverage the strength of SoCalGas and SCE’s relationships with the other partnership cities. The Partnership will also coordinate extensively with local Water District(s) and Waste Management to provide integrated education programs.

d) **Integrated/coordinated Demand-Side Management**

The Partnership will pursue necessary and cost-effective DSM opportunities as identified in the Master PIP.

e) **Integration across resource types (energy, water, air quality, etc.)**

The Partnership promotes comprehensive sustainability, including water conservation and solid waste management as it relates to utility energy elements.

f) **EM&V**

The utilities are proposing to work with the Energy Division to develop and submit a comprehensive EM&V Plan for 2013 - 2014 after the program implementation plans are filed. This will include process evaluations and other program-specific studies within the context of broader utility and Energy Division (ED) studies. More detailed plans for process evaluation and other program-specific evaluation efforts cannot be developed until after the final program design is approved by the CPUC and in many cases after program implementation has begun, since plans need to be based on identified program design and implementation issues.

**5. Partnership Program Advancement of Strategic Plan Goals and Objectives**

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<b>Strategic Plan Strategy</b>	<b>Program Approach to Achieving Strategic Plan Goal</b>
1-1: Develop, adopt and implement model building energy codes (and/or other green codes) more stringent than Title 24's requirements, on both a mandatory and voluntary basis; adopt one or two additional tiers of increasing stringency.	Need to coordinate menu items with SCE
1-2: Establish expedited permitting and entitlement approval processes, fee structures and other incentives for green buildings and other above-code developments.	
1-3: Develop, adopt and implement model point-of-sale and other point-of transactions relying on building ratings.	
1-4: Create assessment districts or other mechanisms so property owners can fund EE through city bonds and pay off on property taxes; develop other EE financing tools.	
1-5: Develop broad education program and peer-to-peer support to local gov't's to adopt and implement model reach codes	
1-6: Link emission reductions from "reach" codes and programs to ARB's AB 32 program	Need to coordinate with SCE
2-2: Dramatically improve compliance with and enforcement of Title 24 building code, and of HVAC permitting and inspection requirements (including focus on peak load reductions in inland areas).	
2-3: Local inspectors and contractors hired by local governments shall meet the requirements of the energy component of their professional licensing (as such energy components are adopted).	
3-1: Adopt specific goals for efficiency of local government buildings, including:	
3-2: Require commissioning for new buildings, and re-commissioning and retro-commissioning of existing buildings.	



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<b>Strategic Plan Strategy</b>	<b>Program Approach to Achieving Strategic Plan Goal</b>
3-4: Explore creation of line item in local government budgets or other options that allow EE cost savings to be returned to the department and/or projects that provided the savings to fund additional efficiency.	
3-5: Develop innovation Incubator that competitively selects initiatives for inclusion in LG pilot projects.	
4-1: Local governments commit to clean energy/climate change leadership.	
4-2: Use local governments' general plan energy and other elements to promote energy efficiency, sustainability and climate change.	
4-4: Develop local projects that integrate EE/DSM/water/wastewater end use	
4-5: Develop EE-related "carrots" and "sticks" using local zoning and development authority	