

**PACIFIC GAS AND ELECTRIC COMPANY  
2013-2014 ENERGY EFFICIENCY PORTFOLIO  
LOCAL PROGRAM IMPLEMENTATION PLAN  
THIRD PARTY  
INNOVATIVE DESIGNS FOR ENERGY EFFICIENCY  
APPROACHES (IDEEA365)**

**ENERGIZE SCHOOLS**

**PGE210139**

**MAY 27, 2014**

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**Sub-program Name: IDEEA365 – Energize Schools**

- 1) **Sub-Program Name: Energize Schools**
- 2) **Sub-Program ID number: PGE210139**
- 3) **Type of Sub-Program: \_\_ Core X Third Party \_\_ Partnership**
- 4) **Market sector or segment that this sub-program is designed to serve:**

- a.  Residential
  - i. Including Low Income?  Yes  No;
  - ii. Including Moderate Income?  Yes  No.
  - iii. Including or specifically Multifamily buildings  Yes  No
  - iv. Including or specifically Rental units?  Yes  No

- b.  Commercial. NAIC codes: 611110

Description of Customer Segment
High schools
Junior high schools
Kindergartens
School districts, elementary or secondary
Schools, elementary
Schools, secondary
Secondary schools offering both academic and technical courses

- c.  Industrial
- d.  Agricultural

**5) This sub-program is primarily non-resource**

- e. Non-resource program  Yes  No
- f. Resource acquisition program  Yes  No
- g. Market Transformation Program  Yes  No

**6) Primary intervention strategies**

- h. Upstream  Yes  No
- i. Midstream  Yes  No
- j. Downstream  Yes  No
- k. Direct Install  Yes  No
- l. Non Resource  Yes  No

**7) Projected Sub-program Total Resource Cost (TRC) and Program Administrator Cost (PAC) TRC n/a PAC n/a**

8) **2013-2014 Sub-Program Budget**

**Table 1. 2013-2014 Subprogram Budget**

Sub Program ID SubProgram Name	Total Administrative Cost	Total Marketing & Outreach	Total Direct Implementation (Customer Services)	Direct Implementation (Incentives & Rebates)	Total 2013-2014 Compliance Budget
PGE210139 Energize Schools	\$50,777	\$30,466	\$426,527	--	\$507,770

9) **Sub-Program Description, Objectives and Theory**

- a) **Sub-Program Description and Theory:** Energize Schools promotes a holistic approach to reducing school energy use through both efficiency and conservation, by filling service, knowledge, and technical gaps that will otherwise keep resource-constrained districts from making the best use of Proposition 39 funds. This approach will maximize existing incentive and rebate programs and engage students in applied learning and leadership as advocates for energy efficiency and organizers of energy conservation campaigns. Energize Schools is initially targeting seven counties identified by PG&E to be high priority, but will be serving all counties throughout PG&E’s territory (and statewide) through free online resources. The program will serve 14 Local Education Agencies (LEAs) on a first come, first served basis, within the approved counties.

Energize Schools components include:

- **Retrofit Support Services:** Energize Schools has designed a suite of Retrofit Support Services to make it easy for LEAs to flexibly respond to Proposition 39 funding opportunities, and to integrate other program resources as appropriate to stretch both PG&E’s IDEEA funds and each LEA’s Proposition 39 allocation. Retrofit Support may include benchmarking, auditing, technical support, project management support, and expenditure plan development and submittal to the California Energy Commission (CEC).
- **Conservation and Education:** The Energize Schools Program is focused on both school efficiency and conservation by working in collaboration with educators and students to reduce environmental impact and operating costs while using interdisciplinary, project-based energy education as a vehicle to help students develop leadership, soft, and technical energy career skills. Energize Schools will provide curriculum, teacher training, and intensive support for technical instruction for energy education projects, such as student-led School Energy Audits. The program team will also initiate student engagement and leadership of school-wide energy use reduction campaigns, implemented through Green School Leadership Teams focused on helping schools maximize energy savings and create a culture of conservation on campus.

b) **Sub-Program Energy and Demand Objectives:**

Projected Gross Impacts: Not applicable for this non-resource program.

- c) **Program Non-Energy Objectives:** The non-energy objectives of Energize Schools include: 1) assisting with Proposition 39 application and implementation for smaller, traditionally underserved LEAs, who may lack staff and technical knowledge of energy efficiency and 2) educating teachers and students about energy efficiency and conservation in order to foster the green workforce and sustainable behaviors.
- d) **Cost Effectiveness/Market Need:** There are many barriers to school energy action and leadership; Energize Schools is designed to address some of the critical obstacles identified, through direct market research and the team’s collective work across hundreds of California schools with school administrators, faculty, and staff.

- **Obstacle 1: LEAs without dedicated staff to support energy efficiency investments:** Energize Schools Retrofit Support Services will enable underserved LEAs to use a greater percentage of their total Proposition 39 allocation for energy use reduction as opposed to administration, technical assistance, and project management.
- **Obstacle 2: Lack of resources and facilities staff training to lead energy efficiency upgrades:** Without the adequate training and resources necessary to scope, manage, and implement a comprehensive energy efficiency upgrade project, district staff is often unable to overcome the complexity, uncertainty, and resources required to take a systematic approach to energy upgrades, resulting in incomplete projects.
- **Obstacle 3: Educator concern over developing curriculum and career skills that meet new requirements:** The instructional resources of the Conservation and Education components of the Program provided are ideally suited to meeting the new requirements for interdisciplinary, applied career skills development in the Common Core and Next Generation Science Standards. Energize Schools’ curriculum, teacher training, and direct instructional support can ease this burden while empowering teachers to provide technical project-based energy education independently year after year.

e) **Measure Savings/ Work Papers:**

Not applicable for this non-resource program.

**10) Program Implementation Details**

a) **Timelines:**

**Table 2:**

Milestone	Date
Market Program	March – November 2014
Recruit and Enroll 14 LEAs	March – November 2014
Technical Support to LEAs	March – December 2014
Conservation and Education Support for Participating Schools	March – December 2014

b) **Geographic Scope:** Energize Schools is currently offered to LEAs in the counties of Contra Costa, Solano, Napa, Sonoma, San Luis Obispo, Stanislaus, and San Joaquin, with the options to expand to other counties as customer need or demand arises. Online trainings are available throughout the PG&E service area.

c) **Program Administration**

**Table 3: Program Administration of Program Components**

Program Name	Program Component	Implemented by IOU Staff? (X = Yes)	Implemented by contractors to be selected by competitive bid process (if Yes then enter type of contractor/other market actor possibly used)	Implemented by contractors NOT selected by competitive bid process (list prime contractor and sub-contractor names)	Implemented by local government or other entity (X = Yes)
Energize Schools	Retrofit Support Services		X – SEI		
Energize Schools	Conservation and Education		X - SEI		
Energize Schools	School Program Coordination, Territory Assignments, and Marketing	X			

d) **Program Eligibility Requirements:**

i. Customers: Energize Schools works with California LEAs which are PG&E customers.

Prior to receiving any subsidized services for a project, the customer is required to sign a Participation Agreement form confirming that the:

- Customer understands that the amount of subsidized services available to each participating LEA are determined by site specific factors such as the number of buildings, square footage, number of teachers, number of students, etc., and
- No-cost subsidized services may not cover the full technical, conservation, and education needs of a school or LEA, depending on the size and complexity of each LEA and school site.

**Table 4: Customer Eligibility Requirements**

<b>Customer Eligibility Requirement (list of requirements)</b>	<b>PG&amp;E</b>
Nonresidential customer	X
Local Educational Authority (LEA)	X
Public school	X
Located in approved counties	X
Served electricity and/or natural gas by PG&E	X

- ii. **Contractors/Participants:** Energize Schools is implemented by the Strategic Energy Innovations (SEI) project team and three pre-determined subcontractors that were part of the IDEEA solicitation process on behalf of PG&E. The project team will not utilize a manufacturer or contractor pool since this is a non-resource program, therefore eligibility requirements are not applicable.
- e) **Program Partners:**
- i. **Manufacturer/Retailer/Distributor partners:** Not applicable for this non-resource program.
- f) **Other key program partners:** None.
- g) **Measures and incentive levels:** Not applicable for this non-resource program.
- h) **Additional Services:**

The program participant is at liberty, but under no obligation, to purchase the services beyond those that are subsidized by PG&E, including, but not limited to: the menu of Retrofit Support Services, and/or Conservation and Education Services provided by Energize Schools. California consumers are not obligated to purchase any full fee service or other service not funded by this Program.

Energize Schools shall secure the customer’s permission to access the customer’s facilities for the purposes of providing retrofit support services or facilitating conservation and education initiatives. The Program will obtain the customer’s written approval through signature on the Participation Agreement form.

**Table 5: Additional Services**

<b>Additional Services that the Sub-Program Will Provide</b>	<b>To Which Market Actors</b>	<b>PG&amp;E</b>
Retrofit Support Services: benchmarking, energy surveys, audits, expenditure plan development, project management, energy management	Participating LEA	X
Conservation and Education Services: energy competitions, Green School Leadership Teams, curriculum, teacher trainings, instructional support, energy education events and fairs.	Participating Schools	X

- i) **Sub-Program Specific Marketing and Outreach:** Energize Schools aims to attract the participation of at least 14 LEAs in this program. Key tasks include, but are not limited to:
  - Disseminating program marketing materials
  - Targeted marketing through PG&E field representatives
  - Leveraging existing relationships with LEAs
  
- j) **Sub-Program Specific Training:** As requested, Energize Schools has and will continue to conduct training calls for PG&E account reps and Local Government Partners to inform staff of Energize Schools’ offerings strategies and tools for marketing it.
  
- k) **Sub-Program Software and/or Additional Tools:** Not applicable for this non-resource program.
  - Pre-implementation audit required \_\_\_ Yes X No
  - Post-implementation audit required \_\_\_ Yes X No
  
- l) **Sub-Program Quality Assurance Provisions:**

*Dispute Resolution Procedures*

To maintain high levels of customer satisfaction, the Program shall actively seek customer feedback and address all customer issues related to the Energize Schools program and related subcontractor work. The Program shall maintain a Customer Service Log to track issues and resolutions.

The Program will respond to customer queries within two business days. If customer issues are unresolved within five business days after the initial complaint, the issue will be escalated to the SEI Program Director. For issues unresolved within ten business days, the Program shall escalate the issue to the PG&E Program Manager.

*Technical Reports and Deliverables*

Technical services, including energy audits, will follow a procedure in compliance with CEC guidelines. Audit reports will document findings in accordance with ASHRAE I and II standards. Energy savings measures will be assessed by a field energy analyst and reviewed by an engineer.

*California Energy Commission review of Proposition 39 projects*

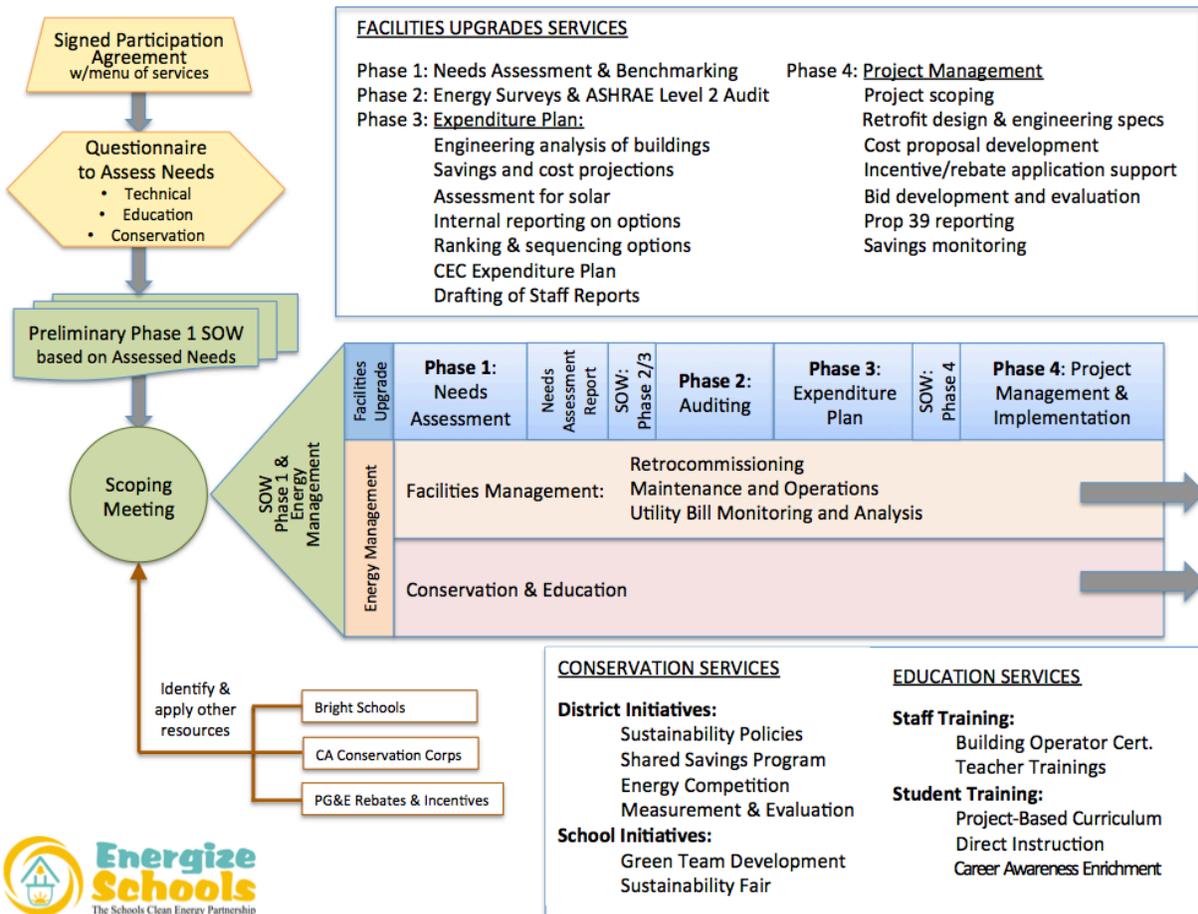
The Energy Commission is required to review and approve every LEA’s energy expenditure plan. The Energy Commission will screen each energy expenditure plan for energy project eligibility criteria and completeness, and then evaluate the proposal for technical and financial accuracy and reasonableness.

m) **Sub-program Delivery Method and Measure Installation /Marketing or Training:**

The Energize Schools team works with PG&E Account Managers to provide trainings with Account Reps, LGPs and service providers on the Energize services. Energize Schools also provides trainings to teachers in project-based learning for student energy education and engagement.

n) **Sub-program Process Flow Chart:**

**Table 6: Energize Schools Sub-Program Process Flow Chart**



- o) **Cross-cutting Sub-program and Non-IOU Partner Coordination:** Energize Schools works with related service providers to maximize LEA funds directed to retrofiting. Partners include the LGPs, ClearResult - SEE, Bright Schools – kW, and the California Conservation Corps. Energize Schools regularly coordinates with Partnerships such as San Mateo County Energy Watch and Sustainable Napa County to coordinate outreach for the Energize Schools program. This coordination takes the form of in person meetings and regularly phone calls as needed (roughly monthly). Energize Schools also coordinates with PG&E Third Party Programs, including the ClearResult SEE Program. We coordinate our outreach efforts with ClearResult SEE so that each program can maximize services provided and eliminate duplicative efforts. These conversations occur regularly during the ramp up of the program, and will continue on a roughly monthly basis moving forward.

**Table 7: Cross-cutting Sub-program and Non-IOU Partner Coordination**

<b>Energize Schools</b>		
<b>Other IOU Sub-program Name</b>	<b>Coordination Mechanism</b>	<b>Expected Frequency</b>
LGPs	Individual or Group Meetings and Email	As needed, roughly monthly
ClearResult	Individual or Group Meetings and Email	As needed, roughly monthly
Bright Schools – kW	Individual or Group Meetings and Email	As needed, roughly monthly
California Conservation Corps	Individual or Group Meetings and Email	As needed, roughly monthly

**11) Additional Sub-Program Information**

- a) **Advancing Strategic Plan Goals and Objectives:** Energize Schools helps schools to cost-effectively invest in energy efficiency retrofits, and thus advances the CPUC’s Long Term Energy Efficiency goal of having 2 billion sq. ft. of commercial space reach the Energy Star target by 2020. Through energy efficiency retrofits and staff training, Energize Schools will help the CPUC achieve its goal of 90 percent of HAVC systems installed to code and optimally maintained for the systems’ useful life.
- b) **Integration**
  - i. **Integrated/coordinated Demand Side Management:** In support of the energy efficiency loading order and as required when using Proposition 39 funds, Energize Schools promotes energy efficiency measures first. If all energy efficiency measures have been exhausted, Energize Schools will help support participating LEAs in making distributed generation investments, if they are a viable option. Energize Schools will inform partner LEAs about all applicable

DSM options. In addition, we work with students to understand peak and off peaks times, causes, and the benefits of smoothing out the demand curve.

- ii. **Integration across resource types** (energy, water, air quality, etc): Not applicable.
- c) **Leveraging of Resources:** It is Energize Schools’ goal to facilitate the maximum benefit to participating LEAs. Energize Schools works with related service providers to maximize LEA Proposition 39 funds directed to retrofiting. Partners include the LGPs, Clear Result - SEE, Bright Schools – kW, and the California Conservation Corps.
- d) **Trials/Pilots:** Not applicable.
- e) **Knowledge Transfer:** Not applicable; this program is aimed at satisfying the requirements of Proposition 39 and not testing new methods.

**12) Market Transformation Information**

Not applicable.

**13) Additional information as required by Commission decision or ruling or as needed**

None.