

**CalSPREE Program- Energy Upgrade California
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Table 1: Total Projected Program Budget by Subprogram by IOU

Subprogram	SCG (\$)	Kwh	KW	Therms
EUC	\$13,344,626	0	0	573,873
Total	\$13,344,626	-	-	573,873

Table 2: Total Projected Program Savings by Subprogram by IOU

Subprogram	SCG Therms
EUC	573,873
Total	573,873

Table 1 - Sub-Program Budget: Projected Sub-Program Budget, by Calendar Year

SoCalGas EUC	Program Year		
	2013	2014	Total
Admin (\$)	\$442,259	\$442,259	\$884,518
Incentives (\$)	\$2,502,400	\$2,502,400	\$5,004,800
Implementation Non-Incentives (\$)	\$3,073,312	\$3,073,312	\$6,146,624
Marketing (\$)	\$654,342	\$654,342	\$1,308,684
Total Budget	\$6,017,971	\$6,017,971	\$13,344,626

Table 2 - Sub-Program Savings: Projected Net Energy & Demand Impacts by Calendar Year

SoCalGas EUC	Program Years		
	2013	2014	Total
GWh			
Peak MW			
Therms (millions)	286,937	286,937	573,874

Table 3.1 Short-Term Program Performance Metrics (PPMs)

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PPM ID	Target	2013	2014	2013-2014
		SoCalGas	SoCalGas	TOTAL
RES-16.1	Number of homes treated in the sub-program for 2013-2014. (Basic Path)	200	200	400
RES-16.2	Number of homes treated in the sub-program for 2013-2014. (Advanced Path)	625	625	1,250
RES-17	Number of enrolled contracting firms participating in the sub-program	included with SCE	included with SCE	included with SCE
RES-18.1	Average Ex-ante savings per home as reported (average kWh, therms, kW) for Advanced path by climate zone	N/A	N/A	N/A
RES-18.2	Average Ex-ante savings per home as reported (average kWh, therms, kW) for Basic Path by climate zone	N/A	N/A	N/A
RES-19	Average and range of evaluated energy savings per home (Basic and Advanced Paths)	N/A	N/A	N/A
RES-20.1	Number of homes not passing Quality Assurance/Quality Control review, by IOU	N/A	N/A	N/A
RES-20.2	Percentage of homes not passing Quality Assurance/Quality Control review, by IOU	N/A	N/A	N/A

PPM's for Multifamily path will need to be developed as this path progresses towards full program implementation.

Table 3.2 Long Term Program Performance Metrics (PPMs)

2013-2014 Statewide Program - Subprogram PIP	MTI Index #	RE-CATEGORIZED Metric (LTPPM - or SPI) [E-4385 Appendix B original text except for noted edits]	Unresolved Issues
Residential - Energy Upgrade California	DeepRetrofit-3	MT Indicator 3: The number and percent of audits performed compared to the number of customers signed up for an audit (NRDC, p.7). Number of IOU customer households that undergo a deep retrofit (Advanced and/or IDSM) audit through IOU programs.	

Table-4a: Measure Savings / Work Paper

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#	Workpaper Number/Measure Name	Approved	Pending Approval	Submitted but Awaiting Review
1	SCG SF Prescriptive Deemed Savings		x	

Table 5: Sub-Program Milestones and Timeline

Milestone	Date
Launch Multifamily Path trials	1st half 2013
Complete Multifamily Path trials	12/31/2014
Launch MIDI Program	1st Qtr. 2013
IOU/ ED Monthly Progress Meetings	1/31/2013-12/31/2014

Table 6: Geographic Regions

Geographic Region	SoCalGas
CEC Climate Zone 1	
CEC Climate Zone 2	
CEC Climate Zone 3	
CEC Climate Zone 4	x
CEC Climate Zone 5	x
CEC Climate Zone 6	x
CEC Climate Zone 7	x
CEC Climate Zone 8	x
CEC Climate Zone 9	x
CEC Climate Zone 10	x
CEC Climate Zone 11	
CEC Climate Zone 12	
CEC Climate Zone 13	x
CEC Climate Zone 14	x
CEC Climate Zone 15	x
CEC Climate Zone 16	x

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Table 7: 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)
EUC	SCG Marketing	X			
EUC	SCG Program Administration	X			
EUC	SCG Contractor/ Rater Training			ICF , Sub Contractor CBPCA	
EUC	SCG QA/QC			ICF , Sub Contractor QC-RHA and QA AESC	
EUC	SCG MIDI Contractor/ Rater Training			Selected ESAP Contractors	
EUC	SCG MIDI QA/QC			Selected ESAP Contractors	
EUC	SCG MF Contractor/ Rater Training		Pending SCE RFP		
EUC	SCG MF QA/QC		Pending SCE RFP		

Table 8: Customer Eligibility Requirements (Joint Utility Table)

Customer Eligibility Requirement (list of requirements)	SCG
Tenant or Owner of SF Bldg with active IOU account(s)	x
Must utilize participating EUC Contractor or Rater (SF)	x
One to four unit building	x
Owner or property mgt. company of MF Bldg with active IOU account(s)	x
More than 4 units , 3 stories or less (MF)	x
Income requirements must be between 200 and 250% of FPG (MIDI)	x

The utilities must work together and submit this table jointly in their respective applications.

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Table 9: Contractor Eligibility Requirements (Joint Utility Table)

Contractor Eligibility Requirement (list of requirements)	SCG
Contractor State Licensing Board (CSLB) in appropriate specialty	x
CSLB "B" General Contractor License (Advance Path Only)	
Bonding and in good standing	x
Insurance to IOU minimum standards	x
Execution of Contractor/ or Rater Participation Agreement	x
BPI Building Analyst Certified OR 3-day Basic Training (Basic Path Only)	x
BPI Building Analyst Certified on Staff (Advanced Path)	x
BPI MF Building Analyst Certified or similar (MF Participating Rater Path)	x
HERSII Certified or similar (MF Participating Rater Path)	x
HERSII and BPI BA Certified (SF Participating Rater Path)	x
2 Years of Relevant Work Experience	
B, C-2 or C-20 license for Basic Only	

List any contractor (and/or developer, manufacturer, retailer or other “participant”) eligibility requirements (e.g. specific IOU required trainings; specific contractor accreditations; and/or, specific technician certifications required).

The utilities must work together and submit this table jointly in their respective applications

Table 10: Manufacturer/Retailer/Distributor Partners

Manufacturer/Retailer/Distributor Partner Information	SCG
Manufacturers enrolled in program	none
Manufacturers targeted for enrollment in program	none
Retailers enrolled in program	none
Retailers targeted for enrollment in program	none
Distributors enrolled in program	none
Distributors targeted for enrollment in program	none

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Table 11: Summary Table of Measures, Incentive Levels and Verification Rates

Measure Group	Market Actor Receiving Incentive or Rebate	SCG	
		Incentive Level	Installation Sampling Rate
		Incentive level will be paid dependent on SCG shared utility service territory. The incentive will vary 32% to 50 %of total incentive shown	
10% Performance SF	Customers	\$ 1,000	Tiered 100%-5%
15% Performance SF	Customers	\$ 1,500	Tiered 100%-5%
20% Performance SF	Customers	\$ 2,000	Tiered 100%-5%
25% Performance SF	Customers	\$ 2,500	Tiered 100%-5%
30% Performance SF	Customers	\$ 3,000	Tiered 100%-5%
35% Performance SF	Customers	\$ 3,500	Tiered 100%-5%
40% Performance SF	Customers	\$ 4,000	Tiered 100%-5%
45%+ Performance SF	Customers	\$ 4,500	Tiered 100%-5%
Basic Path	Customers	\$ 1,000	Tiered 100%-5%
		SCG M/F = 32% of incentive shown.	
10% Performance MF	Customers	\$ 700	100% *
15% Performance MF	Customers	\$ 800	100% *
20% Performance MF	Customers	\$ 1,000	100% *
25% Performance MF	Customers	\$ 1,200	100% *
30% Performance MF	Customers	\$ 1,400	100% *
>35% Performance MF	Customers	\$	100% *

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		1,600	
*100% or as needed.			
a. Use a single excel spreadsheet to indicate the eligible measures for the program across all IOUs. Indicate the expected incentive level by measure or measure grouping for each IOU, making clear where these vary.			
b. For each incented or rebated measure, indicate the market actor to whom this will be provided.			
c. SCG will work closely with Customer through single point of contact.			

Table 12: Additional Services

Additional Services that the Sub-Program Will Provide	To Which Market Actors	SCG
		[indicate the level at which the service will be incented or funded]
N/A	N/A	N/A

a. For each service provided, indicate any expected charges to market actors of the services, and/or the level at which any such services will be incented or funded.

Table 13: Program Related Audits

Levels at Which Program Related Audits Are Rebated or Funded	Who Receives the Rebate/Funding (Customer or Contractor)
M/F EUC Initial and Investment Grade Audits 100%	Contractor
MIDI Assessmentsc100%	Contractor
S/F EUC	N/A

NOTE: If software tools are required sub-program participation, and if there is a program related audit for the sub-program, this table shows the levels at which the audit is rebated or funded and to whom such rebates/funding will be provided (i.e., customer or contractor)

Table 14: Quality Assurance Provisions

QA Requirements	QA Sampling Rate (Indicate Pre/Post Sample)	QA Personnel Certification Requirements

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SCG QA requirements #1	100% Pre Project QA (desktop)	N/A
SCG QA requirements #2	100% Post Project QA (desktop)	N/A
SCG QC requirements #1	60% first 5 projects (Pre)	BPI BA
SCG QC requirements #2	27% of next 15 projects (Pre)	BPI BA
SCG QC requirements #3	5% after 20th project (Pre)	BPI BA
SCG QC requirements #4	60% first 5 projects (Post)	BPI BA
SCG QC requirements #5	27% of next 15 projects (Post)	BPI BA
SCG QC requirements #6	5% after 20th project (Post)	BPI BA
*SCE sampling rate is subject to modification to meet program needs.		

NOTE: Please list quality assurance, quality control, including accreditations/certification or other credentials required.

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Table 15: Cross-cutting Sub-program and Non-IOU Partner Coordination

Sub-Program Name		
Other IOU Sub-program Name	Coordination Mechanism	Expected Frequency
PLA (HEER)	Meetings	Monthly/As-Needed
MFEER	Meetings	Monthly/As-Needed
HEES	Meetings	Monthly/As-Needed
QI/ QM	Meetings	Monthly/As-Needed
CSI	Meetings	Monthly/As-Needed
ESAP	Meetings	As-Needed
Coordination Partners Outside CPUC		
Los Angeles County	Meetings	Monthly
Santa Barbara County	Call	As-Needed
City of San Bernardino	Call	As-Needed
County of Santa Barbara	Meetings	Monthly

Note: “Mechanisms” refers to communication methods (i.e. quarterly meetings; internal list serves; monthly calls, etc.) and/or any cross-program review methods (i.e., feedback on program plans; sign off on policies, etc.) or harmonization techniques (i.e. consistent certification requirements across programs, program participant required cross trainings, etc.).

Table 16: Non-EE Sub-Program Information

Sub-Program Name		
Non-EE Sub-Program	Budget	Rationale and General Approach for Integrating Across Resource Types
N/A	N/A	N/A

NOTE: Column C --> Integrated/coordinated Demand Side Management: As applicable, describe how sub-program will promote customer education and sub-program participation across all DSM options. Provide budget information of non-EE sub-programs where applicable. Column D --> Integration across resource types (energy, water, air quality, etc.): If sub-program aims to integrate across resources types, please provide rationale and general approach