

Project ID		Project Scope										SPM Alignment		Progress Indicators			
Partnership Name	Project Name	Connection to Past Project?	Project Scope and Description (Max 600 Characters)	Applicable Sector	Primary Beneficiary/ies	Multi-IOU Project?	Start Date (MONTH-YYYY)	Original Estimated Completion Date (MONTH-YYYY)	SCE Budget Allocation to Project	Matching Funds Amount and Detail (if applicable)	Primary SPM Item Alignment	Secondary SPM Item Alignment	Specify Deliverable and/or Evaluative Metric	Goal	# Plans or Policies to be Developed (optional)	Estimated Electricity Savings (kWh) (optional)	# of Outreach Events to be Held (optional)
South Santa Barbara County Energy Leader Partnership	Create a Neighborhood Development Floating Zone to Foster Green Community Development	2013-2015 Continuation	Phase 3: The City of Goleta will create a Neighborhood Development Floating Zone to foster green community development and will develop tools for planning and implementation of the floating zone. This task combines the use of planning and development at the neighborhood level, floating zones, analysis of EE scenarios impacting neighborhood development. LEED-ND is the standard, and a land use scenario analysis tool to evaluate various scenarios.	Public Residential	City of Goleta	N/A	August-2013	December-2015	\$ 43,987	\$ -	1.1.5. Energy Efficiency Codes & Programs	N/A	Neighborhood Development Floating Zone Code adopted by City Council	The goal of this task is to develop and adopt a policy on floating zones, and related tools, that will institutionalize green neighborhood development standards, including EE, into a single zoning district by incorporating them as eligibility conditions and district regulations, which can then be affixed to appropriate locations.	1		
Eastern Sierra Energy Leader Partnership	Develop a Policy for a Revolving Energy Efficiency Fund for County Facilities	New Project	Phase 3: The County of Inyo will develop and approve a policy and plan for a revolving EE fund (REEF) for its facilities. The REEF will provide a fund to finance EE projects without the use of the general fund to help the implementer reach its energy reduction goals. Implementer will: <ul style="list-style-type: none"> <li>Develop REEF goals and policy</li> <li>Develop a REEF program plan that includes:                             <ul style="list-style-type: none"> <li>Identified opportunities for seed money</li> <li>Methodology for monitoring and reimbursements</li> <li>Expected paybacks and timeframes</li> <li>Project selection criteria</li> </ul> </li> <li>Methodology for incorporating other incentive programs into the funding mechanism</li> </ul>	Public	County of Inyo	N/A	August-2013	April-2014	\$ 44,889	\$ -	3.2.3. Local Gov't Revolving Energy Efficiency Fund	N/A	Final EE Revolving Loan Fund Policy adopted by Board of Supervisors	The goal of this task is to establish a revolving energy efficiency fund that will enable implementer to implement EE projects without relying on it's general fund to finance the projects.	1		
Community Energy Partnership	Redesign Forms: Enforcement Compliance, Plan Review Processes	2013-2015 Continuation	Phase 3: The City of Moreno Valley will redesign forms and hand-outs, and create hand-out(s) pertaining to CalGreen and the incorporation of EE into construction projects. These forms will help developers and homeowners by providing information early in the process, and will reflect all changes to Title 24 and CalGreen through the end of 2013.	Public Residential Commercial	City of Moreno Valley	N/A	August-2013	June-2015	\$ 16,820	\$ -	2.1.2. Code Compliance and Enforcement	N/A	Forms and handouts to be completed fall into the following categories: <ul style="list-style-type: none"> <li>Forms Retained Without Modification</li> <li>Forms Revised</li> <li>Forms Eliminated</li> <li>Forms Added</li> <li>Fact or Information Sheets Added</li> </ul>	The goal of this task is to develop new forms to assist permit applicants with CalGreen compliance, EE, and Title 24 compliance.	3		
Community Energy Partnership	LEED Standards for New Municipal Buildings	2013-2015 Continuation	Phase 3: The City of Moreno Valley will prepare and adopt a policy requiring new city buildings to be designed consistent with more efficient standards than currently required. As part of the task, implementer will: <ul style="list-style-type: none"> <li>Implement a measure that is included in City's Energy Action Plan and Climate Action Strategy.</li> <li>Develop a standard that requires new City buildings to meet LEED standards without undergoing the LEED-certification process.</li> </ul>	Public	City of Moreno Valley	N/A	August-2013	May-2015	\$ 19,820	\$ -	3.2.2. Local Gov't Building Standard	N/A	Final, adopted LEED Standards for New Municipal Facilities	The goal of this task is to develop and adopt a policy that would require new city building to meet a specific standard that will be determined through the task. This standard will be based on LEED or other similar energy rating system.	1		
Ventura Energy Leader Partnership	Develop and Implement an Expedited Permitting Program	2013-2015 Continuation	Phase 3: The City of Oxnard will develop an expedited permitting program for projects that achieve specific building criteria developed for the program. The checklist provides a scoring of the project with the points based on green building measures identified in LEED, Energy Star, GreenPoint rating, CALGreen tiers, or other similar EE rating programs. Checklists will be developed for new construction, major renovations, and tenant improvement projects. Staff will also be trained to provide additional EE and green building measures recommendations at the permit counter.	Public Residential Commercial	City of Oxnard	N/A	August-2013	January-2015	\$ 47,500	\$ -	1.1.5. Energy Efficiency Codes & Programs	N/A	1. EE and Green Building Checklists 2. Staff Training on the Expedited Permitting Program	The goal of this task is to develop the Expedited Permitting Program to increase the number of energy efficient construction/retrofit projects.	-		
San Gabriel Valley Energy Leader Partnership	Develop and Adopt a Voluntary Green Building Program	2013-2015 Continuation	Phase 3: 2. San Gabriel Valley Council of Governments will develop a voluntary green building program (San Gabriel Valley Green Building Initiative) that increases the installation of EE equipment for existing construction through education and outreach. Implementer will: <ul style="list-style-type: none"> <li>Develop a Green Building Guidebook with regionally relevant content for residents, builders and developers;</li> <li>Review Energy Action Plans for Participating Municipalities (PMs) for EE strategies for the Green Building Guidebook;</li> <li>Develop the Green Building Regional website and customize pages for PMs that contain city-specific energy information, programs, and goals.</li> </ul>	Public Residential Commercial	Cities of Alhambra, Arcadia, Baldwin Park, Bradbury, Claremont, Covina, Diamond Bar, Duarte, El Monte, Irwindale, La Canada Flintridge, Monterey Park, Pomona, Rosemead, San Dimas, San Gabriel, South El Monte, South Pasadena, Temple City, Walnut, West Covina	N/A	August-2013	July-2015	\$ 84,100	\$ -	1.1.2. Green Building Code	N/A	1. Green Building Regional Portal Website Content 2. Final Green Building Guidebook 3. Live and Fully Functional Green Building Regional Portal Website	The goal of this task to develop the San Gabriel Valley Green Building Initiative to drive building performance that exceeds Title 24 requirements by capitalizing on the unique position and role that local government has in reviewing construction activity taking place in the city.	-		

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Partnership Name	Project Name	Project Status	Scope Completed to Date	Scope Remaining to be Completed	Revisions to Project Timeline?	Revisions to Project Budget?	Revisions to Project Scope?	Elected / Appointed Officials	Dept Directors / City Manager	Other local gov't staff	Support Staff / Consultant / OJUI / Non	Public / Community Members	Total Engagements	October 2016 Narrative Update (January 1 - June 30, 2016)	Lessons Learned Reporting (Cumulative)	Links to Work Product or Deliverable?	
South Santa Barbara County Energy Leader Partnership	Create a Neighborhood Development Floating Zone to Foster Green Community Development	Cancelled	Prepared and submitted the following: 1. Report on Status of Hiring Expertise to Support the Task; 2. Draft Assessment & Planning Report; 3. Final Assessment & Planning Report.	N/A	Withdrawn Jun 2016	None	None	-	-	1	1	-	2	1. Project withdrawn per discussions with SCE due to data challenges and limited influence of voluntary ordinance. It was determined that in light of the limited available data, an aging housing stock, and a community that is 99% built-out, supporting the upgrade of the existing multifamily building stock rather than continue to pursue a voluntary ordinance that would potentially apply to a only a few, if any future development projects is a better approach for future activities.	<ul style="list-style-type: none"> <li>The City's goal with its Phase 3 Strategic Plan Program was to enhance neighborhood sustainability by integrating energy considerations into development decisions.</li> <li>It was determined that in light of the limited available data, an aging housing stock, and a community that is 99% built-out, supporting the upgrade of the existing multifamily building stock rather than continue to pursue a voluntary ordinance that would potentially apply to a only a few, if any future development projects is a better approach for future activities.</li> <li>This move is supported by the fact that 85 % of the City's housing stock was built prior to 1950 and is likely to be in need of ongoing maintenance and repair. Additionally, multifamily buildings with 5 or more units comprise approximately 25% of the City's total housing stock.</li> </ul>	N/A	
Eastern Sierra Energy Leader Partnership	Develop a Policy for a Revolving Energy Efficiency Fund for County Facilities	Complete	1. The County updated the draft Energy Efficiency Revolving Loan Fund Policy Report including tracking tools 2. The County refined the tracking tools developed for the revolving loan fund 3. The County identified seed funding mechanisms for the revolving loan fund 4. The County developed a list of energy efficiency projects to inform the amount of seed funding necessary to capitalize the revolving loan fund 5. Revolving Loan fund was approved on Jan 12, 2016 6. Final Report submitted and accepted Mar 2016	Completed Jan 2016	Completed	No budget revisions.	No revisions to project scope. Project has been completed.	5	5	3	3	-	16	1. Board of Supervisors approved the EERLF on January 12, 2016. 2. Final Report was submitted and accepted by SCE on March 30, 2016	<ul style="list-style-type: none"> <li>Finding Seed Money is difficult.</li> <li>Due to the County's small size and scale of facilities, there are not huge reductions and cost savings to make the program as enticing as staff had hoped.</li> <li>There is resistance within the status quo to create a funding source limited to energy reduction projects.</li> </ul>	N/A	
Community Energy Partnership	Redesign Forms: Enforcement Compliance, Plan Review Processes	Complete	1. Discuss task and modifications to the forms. 2. Made modifications to forms. 3. Completed forms. 4. Completed Final Assessment Report.	Completed March 2016	Completed	No budget revisions.	No revisions to project scope. Project has been completed.	7	4	8	-	-	19	1. The draft Planning and Assessment Report was completed. 2. Forms were completed in March 2016.	<ul style="list-style-type: none"> <li>Based on the research completed, the City provided the information in the most accessible manner possible. It is important to provide forms that will be useful to both homeowners and developers to maximize the accessibility of information on energy efficiency and CalGreen for the public. The only big challenge that occurred in accomplishing this task was that locating the information regarding CalGreen can sometimes be challenging.</li> </ul>	N/A	
Community Energy Partnership	LEED Standards for New Municipal Buildings	Complete	1. Completed the draft policy language 2. Completed draft Assessment & Planning Reports 3. Policy language was finalized and approved on Mar 1, 2016 4. Completed Final Report	Completed March 2016	Completed	No budget revisions.	No revisions to project scope. Project has been completed.	7	4	8	-	-	19	1. Policy language was finalized and approved by the City Council on March 1, 2016. 2. Final Planning and Assessment Report was completed in March, 2016.	<ul style="list-style-type: none"> <li>The City reviewed the LEED rating system and determined to use the most suitable standard to achieve a meaningful level of energy efficiency and other sustainable building measures in support of the City's Climate Action Strategy.</li> <li>Based on the research, there would appear to be strong evidence that the energy savings over the life of City projects would far outweigh the initial investment to achieve a potential green rating. For this reason, the benefit of developing the policy far outweighs any costs. The question is what the particular guidance in the policy should include. Certainly, the ratio of cost of applying LEED and other green rating systems to return in energy savings will generally be higher for a smaller new project or a retrofit project.</li> <li>In view of this, and based on the research as a whole, it is appropriate for the policy to either include a higher end threshold (e.g., 10,000 square feet) for triggering the requirement for a green rating system, and/or include provisions that would exempt certain buildings from the policy if it is determined to not be cost effective. Currently no new City building projects</li> </ul>	<a href="http://ccode.us/codes/morenovalley/revists/ans/310.pdf">http://ccode.us/codes/morenovalley/revists/ans/310.pdf</a>	
Ventura Energy Leader Partnership	Develop and Implement an Expedited Permitting Program	Complete	1. Developed process flow charts and check lists for five of the most common residential permits. 2. Met with City and County regarding checklist/process flow chart. 3. Discussed with County of Ventura outreach collaboration for check lists and flowcharts. 4. Continued to evaluate the best way to roll out program on City's permit software system. Created email address for on line submission. Began accepting faxed submittal 5. Completed Lessons Learned and Best Practices Document and Final Report for Program 6. Project Completed March 15, 2016	Completed March 2016	Completed	No budget revisions.	No revisions to project scope. Project has been completed.	-	4	18	16	-	38	1. Completed Lessons Learned and Best Practices Document and Final Report for Program 2. Project Completed March 15, 2016	<ul style="list-style-type: none"> <li>With the implementation of the 2014 Building Code, it became evident that energy efficiency beyond Title 24 for single family residential was not realistic.</li> <li>Program success would be optimized if lessons learned, solutions, and opportunities for energy efficiency permitting were shared with larger stakeholder groups, industry organizations, and the building industry to name a few.</li> </ul>	N/A	
San Gabriel Valley Energy Leader Partnership	Develop and Adopt a Voluntary Green Building Program	In Progress	1. Final Green Building website content approved. Website active and continues to be updated. 2. Submitted Final Green Building Guidebook to stakeholders. Final report will be submitted shortly. 3. Educational home improvement handouts are complete and are currently being distributed to all the cities in the SOV. 4. Final best practices report submitted.	1. Final program reports submitted in July 2016.	To be completed September 2016.	None	None	-	48	120	-	-	168	1. Final Green Building website content approved. Website active and continues to be updated. 2. Submitted Final Green Building Guidebook to stakeholders. Final report will be submitted shortly. 3. Educational home improvement handouts are complete and are currently being distributed to all the cities in the SOV. 4. Final best practices report submitted.	<ul style="list-style-type: none"> <li>Early Engagement of Homeowners: The original program design focused on engaging homeowners when they were seeking permits, with the goal of informing them of potential modifications they could make to their planned projects to increase the energy efficiency of their home. However, after discussions with city staff and other stakeholders and further research of other programs, staff determined that it is critical to engage homeowners prior to the start of any major renovation project. This accomplishes several goals: 1) influencing the products, materials and installation method a homeowner might select on a project that they have already committed to undertaking; 2) influencing homeowners to undertake a new project that they may not have been considering; and 3) educating homeowners about the importance of securing a building permit for applicable projects in order to ensure proper installation and performance. By the time a homeowner is seeking a permit, they have usually solidified a scope of work, set a budget, and selected a contractor. Therefore, it is very difficult to influence that project.</li> </ul>	<a href="http://www.sqvernerwise.org/green-building-guidebook">http://www.sqvernerwise.org/green-building-guidebook</a>	

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San Gabriel Valley Energy Leader Partnership	Online Permitting Service	2013-2015 Continuation	Phase 3: 3. San Gabriel Valley Council of Governments will develop an online permitting system that integrates EE at strategic points in the building permit process. By streamlining the permit process, code compliance will be more convenient and likely to increase. SCE's program info will be integrated into the system. Information about EE and incentives/rebates will be provided to applicants at the time of initial application. This may be done via online permitting system or a counter technician for walk-in applications. The on-line system may direct the applicant to the Green Building Regional website, if appropriate.	Public Residential Commercial	Cities of Alhambra, Bradbury, Covina, Duarte, El Monte, Irwindale, La Canada Flintridge, Monterey Park, Pomona, Rosemead, San Dimas, South El Monte, South Pasadena, Temple City, West Covina	N/A	August-2013	June-2015	\$ 563,010	\$ -	1.1.5. Energy Efficiency Codes & Programs	N/A	1. Detailed Specifications Report for the On-line Permitting Service 2. Documentation of Updated Internal Permit Processing Procedures 3. On-line Permitting Service Staff Training Report 4. Live and Fully Functional On-line Permitting Service for Each Participating Municipality 5. Final Implementation Report for the On-line Permitting Service	The goal of this task, is to install online permitting systems for Participating Municipalities. These systems will be set up to provide the applicant with information regarding EE and demand response, and other SCE offerings.	-	-	-	
San Gabriel Valley Energy Leader Partnership	Redesign Enforcement, Plan Review Processes	2013-2015 Continuation	Phase 3: San Gabriel Valley Council of Governments will redesign the inspection process by developing an EE Point-of-Permit Program. Materials include forms, templates, checklists, and marketing materials, and training to integrate EE elements into city permit and inspection processes. Each participating municipality (PM) can choose from two options: • Level One includes using checklists during the pre-inspection process. • Level Two includes a mandatory assessment, and will require the PM to conduct an assessment for major renovations.	Public Residential Commercial	Cities of Alhambra, Arcadia, Bradbury, Claremont, Covina, Diamond Bar, El Monte, Irwindale, La Canada Flintridge, Monterey Park, Pomona, Rosemead, San Dimas, South El Monte, South Pasadena, Temple City, West Covina	N/A	August-2013	June-2015	\$ 202,300	\$ -	2.1.2. Code Compliance and Enforcement	N/A	1. Final Procedures for Implementing Program for Each Participating Municipality 2. Energy Efficiency Checklist 3. Report on Training City Staff to Implement Program 4. Report on Program Launch	The goal of this task is to incorporate EE into the inspection process, and modify the role of building and safety departments to increase the installation of EE for Participating Municipalities.	-	-	-	
South Santa Barbara County Energy Leader Partnership	Energy Efficiency Standard for County Owned Facilities	2013-2015 Continuation	Phase 3: This County of Santa Barbara will develop an EE standard for county facilities to increase the level of EE in those buildings and facilities. The standard will be structured as a resolution, which will make it mandatory for qualified construction projects. In addition to the standard an implementation guide will be developed to assist staff in working with the EE standard. The standard and associated documents will be submitted to the Board of Supervisor for approval.	Public	County of Santa Barbara	N/A	August-2013	September-2015	\$ 84,616	\$ -	1.1.2. Green Building Code	N/A	1. Final EE Standard for County Owned Facilities and Implementation Guide approved by Board of Supervisors	The goal of this task is to develop and implement a mandatory EE standard for county facilities that is more stringent than current applicable codes.	-	1	-	
Ventura Energy Leader Partnership	Develop a Regional Template For a Climate Action Plan (CAP)	2013-2015 Continuation	Phase 3: Ventura County Regional Energy Alliance will develop the following tools that participating local governments (LG) can use to develop their Climate Action Plans (CAP): • Develop energy and greenhouse gas (GHG) inventories for each LG (except for Oxnard which already has an inventory) • Develop CAP templates with EE chapter for each member LG, as well as a regional template. The templates will include the results of the energy and GHG inventories and will identify potential target areas to be considered for mitigation strategies. These templates will be provided to VCREA's member cities for use as they develop their respective CAPs.	Public Residential Commercial Industrial Agricultural	Cities of Camarillo, Fillmore, Moorpark, Ojai, Oxnard, Port Huemene, Santa Paula, Simi Valley, Thousand Oaks, and Ventura, and Unincorporated Areas of Ventura County)	N/A	August-2013	January-2015	\$ 140,000	\$ -	4.1.1. Community-Wide EAP/CAP Template	N/A	1. Develop energy and GHG inventories for participating LGs. 2. Develop energy and GHG inventories for the Region. 3. Develop CAP templates for participating LGs. 4. Develop CAP template for the Region.	The goal of this task is to develop resources (energy and GHG inventories and templates for CAPs with energy chapters) for member cities to use to fully develop community CAPs.	-	1	-	
Ventura Energy Leader Partnership	Purchase and Implement On-Line Electronic Plan Check System	2013-2015 Continuation	Phase 3: The County of Ventura will implement an online plan check system that allows permit applicants to submit building/engineering plans online. Through the web interface developed in Task 1.1.5, the system would facilitate the identification of EE opportunities and provide links to EE information. The County will: • Conduct an assessment of the plan-check needs within the county's selected agencies • Develop specifications for the system • Purchase and install the system • Develop and implement the interface to accommodate on-line plan submittals • Implement the system	Public Residential Commercial	County of Ventura	N/A	May-2014	June-2015	\$ 84,600	\$ -	1.1.5. Energy Efficiency Codes & Programs	N/A	1. Assessment of EDRS Needs within Agencies 2. Specifications of EDRS System 3. Purchase and Install EDRS System 4. Installation and Training Report	The goal of this task is to develop and implement a system to enable the on-line submittal of plans/drawings associated with permits. This would increase the permitting of more complex projects and can facilitate the identification of EE opportunities.	-	-	-	

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San Gabriel Valley Energy Leader Partnership	Online Permitting Service	Cancelled	1. Approved MOU for use with participating cities 2. Met with 15 cities to develop plans to implement customer-facing online permitting 3. Initiated task close-out due to a lack of city engagement	Task withdrawn Jul 2016.	Task withdrawn Jul 2016.	Remaining budget will not be spent due to discontinuing the task.	In July 2016, the SGVCOG initiated a closeout of the online permitting task due to the lack of city interest and engagement.	-	24	60	-	-	84	1. The SGVCOG decided in July 2016 to discontinue the online permitting task due to a lack of city interest, engagement and resources.	One key takeaway from the pursuit of this task is to insure online permitting can be integrated by accounting for the following: • The ability to accept electronic payment • A realistic procurement timeline • Electronic permit software already in place	N/A
San Gabriel Valley Energy Leader Partnership	Redesign Enforcement, Compliance, Plan Review Processes	In Progress	1. Held staff training on checklist in December 2014. 2. Submitted draft implementation procedures to SCE in December 2014. 3. Held staff trainings on home assessment procedures in participating cities in January 2015. 4. Launched program in participating cities and delivered educational materials in January and February 2015. 5. Staff conducting home assessments and collecting implementation data from participating residents. 6. Final report on Program Launch has been submitted. 7. Final best practices report has	1. Final program reports submitted in August 2016.	To be completed by August 2016.	None	None	-	24	60	-	-	84	1. Submitted final program report. 2. Submitted final best practices report.	Some of the key lessons learned from the project include engaging homeowners before they have begun planning projects or seeking permits; developing an extensive education and outreach plan; and providing comprehensive information about related programs and financing offerings that can assist with implementation of projects.	<a href="http://www.sgvenergywise.org/essay">http://www.sgvenergywise.org/essay</a>
South Santa Barbara County Energy Leader Partnership	Energy Efficiency Standard for County Owned Facilities	In Progress	1. Draft EE Standard completed 2. Staff report being finalized 2. Draft policy completed	1. Board of Supervisors Approval 2. Training of County Staff	To be completed by August 2016.	None	None	-	-	-	-	-	-	1. Staff report was finalized and on County board agenda for the month of August 20th 2. As of Aug. 20th the Board has approved the ZNE policy		<a href="https://santabarbara.legistar.com/LegislationDetail.aspx?ID=2819679&amp;GUID=B445E593E-FFA8-4684-A68A-E1BD06558309">https://santabarbara.legistar.com/LegislationDetail.aspx?ID=2819679&amp;GUID=B445E593E-FFA8-4684-A68A-E1BD06558309</a>
Ventura Energy Leader Partnership	Develop a Regional Template For a Climate Action Plan (CAP)	Complete	1. Held stakeholder workshop on Climate on the Move Sep 2 2. Performed new waste analysis for City of Ventura 3. Completed public draft of Climate on the Move 4. Presented to VCREA Board 5. Presented to City of Thousand Oaks 6. Completed best Practice and Lesson Learned Report 7. Finalized Climate Action Plan Templates. 8. Completed Roadshow Meetings with City Staff and City Managers to align Countywide Goals 9. Completed project March 31, 2016	Completed March 2016	Completed March 2016	None	None	27	34	63	48	-	172	1. Finalized Climate Action Plan Templates 2. Completed Roadshow Meetings with City Staff and City Managers to align Countywide Goals 3. Finalized Best Practices and Lessons Learned Report and Final Program Report 4. Completed task March 31, 2016	<ul style="list-style-type: none"> <li>• More reliable and granular data on energy use at the community level would have allowed VCREA to accomplish more by developing weighted sectoral strategies, particularly for commercial, industrial and agricultural uses. The types of measures required to improve energy efficiency and reduce GHGs among the three sectors are not comparable.</li> <li>• Know the data confidentiality rules the utilities must follow for their customer data. For example, some large customers may be removed from the data that is transmitted.</li> <li>• Perform early and aggressive review of data, immediately upon its receipt to ensure the data are complete and accurate. This could have shortened the time required to complete the project.</li> <li>• Direct communication between data analysts at VCREA and data analysts at utilities could have improved and hastened questions related to data integrity and errors.</li> <li>• Better municipal records on rooftop solar will allow local and regional governments to identify the energy and GHG savings (avoided emissions) that result from this form of renewable energy. Currently, that data is highly variable and generally not available.</li> <li>• Two or three additional meetings with the Participating Municipalities' program champions, at their locations, could have increased interest in the program. The challenge for small cities is staff availability. This also holds true for implementing any energy efficiency programs, and may require investment of professional time and boots on the ground on the part of utilities.</li> </ul>	<a href="http://www.vccrea.com">www.vccrea.com</a>
Ventura Energy Leader Partnership	Purchase and Implement On-Line Electronic Plan Check System	Complete	1. Conducted initial research and acquire information in preparation for development 2. Purchased and installed equipment and licenses 3. Executed analysis sessions with each participating County department 4. Worked with Woolpert to configure software 5. Prepared for User Acceptance Testing (UAT).	Completed March 2016	Completed March 2016	None	None	-	7	48	16	-	71	1. Completed March 2016	<ul style="list-style-type: none"> <li>• Analysis sessions with each of the participating agencies:                             <ul style="list-style-type: none"> <li>o Identifying which record types in system would be using electronic plan check.</li> <li>o Identifying which County staff would need a license for electronic plan check.</li> <li>o Finalizing information that must be standardized and shared by all agencies like statuses, codes, and templates for correction notice reports.</li> </ul> </li> </ul>	<a href="https://vcca.ventura.org/landing.html">https://vcca.ventura.org/landing.html</a>

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Ventura Energy Leader Partnership	Develop and Implement On-Line Permit Application Program	2013-2015 Continuation	Phase 3: The County of Ventura will develop and implement an on-line permit program that would utilize the installed on-line permit system. The County will: • Identify types of permits for inclusion in the program; • Develop forms and associated materials. • Develop web interface to accommodate on-line application submittals • Provide training to customers and staff • Track detailed permit information • Develop a report to track information beyond program cycle.	Public Residential Commercial	County of Ventura	N/A	May-2014	April-2015	\$ 35,400	\$ -	1.1.5. Energy Efficiency Codes & Programs	N/A	1. On-Line Permitting Forms 2. Customer Outreach and Training Plan 3. Implementation Report of the On-Line Permit Application Program and Customer-facing Website	The goal of this task is to develop and implement an on-line permitting program whose core would be the Plan Check System installed in Task 1.1.5, Deliverable 1. This program will increase the number of permits issued by making the permitting process more convenient and would introduce applicants to EE options and requirements for incorporation into projects.	-			
Western Riverside Energy Leader Partnership	On-Line Permitting	2013-2015 Continuation	Phase 3: Western Riverside Council of Governments will purchase and install on-line permitting systems for the cities of Perris and Wildomar. Perris will install and implement a complete on-line permitting system, utilizing the approach taken by other member cities of WRCOG during Phase 2 of the SP Program. The software proposed will be compatible with the Perris financial system. Wildomar will enhance its existing online permitting system (installed during the Phase 1 of the SP Program) by adding a code enforcement module to further integrate online permitting system into permitting operations.	Public Residential Commercial	Cities of Perris and Wildomar	N/A	August-2013	April-2015	\$ 87,000	\$ -	1.1.5. Energy Efficiency Codes & Programs	N/A	The new online system will collect data on energy-efficient building projects, and this data will be made available through WRCOG and the Western Riverside Energy Leaders Partnership websites, quarterly electronic newsletters, and quarterly Partnership meetings.	The goal of this task is to install on-line permitting systems at the two Participating Municipalities which are expected to increase code compliance and installation of EE measures among city constituents and developers.	1			
Western Riverside Energy Leader Partnership	Revolving Energy Efficiency Fund	2013-2015 Continuation	Phase 3: Western Riverside Council of Governments will develop a Regional Revolving Energy Efficiency Fund (RREEF) will be established for participating cities. This task will include the following activities: • Identify seed funding for RREEF • Develop a RREEF administrative manual with operating procedures and worksheet models to assist administrators with fund management • Establish the fund, including the development of staff approval materials, presentations to necessary board committees, and coordination with auditors and counsel (internal and external) to properly establish a distinct fund for this purpose.	Public	Cities of Calimesa, Canyon Lake, Eastvale, Hemet, Lake Elsinore, Menifee, Murrieta, Norco, Perris, San Jacinto, Temecula, and Wildomar	N/A	August-2013	June-2015	\$ 126,150	\$ -	3.2.3. Local Gov't Revolving Energy Efficiency Fund	N/A	1. Report on Identification of Seed Funding for RREEF 2. Administrative Manual	The goal of this task is to establish a Regional Revolving Energy Efficiency Fund to provide a sustainable source of funding for EE projects for Participating Municipalities.	1			
South Santa Barbara County Energy Leader Partnership	Workshop to Improve Adoption of Reach Codes	2013-2015 Continuation	Embedded 2013-2015: Develop and conduct a workshop for local elected officials, building officials, commissioners, and stakeholders to improve adoption of energy efficiency codes, ordinances, standards, guidelines and programs.	Public	Cities of Santa Barbara, Goleta, and Carpinteria, and County of Santa Barbara	N/A	January-2015	December-2015	\$ 3,300	\$ -	1.1.6. Educational Programs	N/A	Develop and conduct a workshop for local elected officials, building officials, commissioners, and stakeholders to improve adoption of energy efficiency codes, ordinances, standards, guidelines and programs.	Greater local governments support for the adoption of "reach" codes stronger than Title 24 on both mandatory and voluntary bases.	-			
San Joaquin Energy Leader Partnership (AKA VIEW Partnership)	Benchmarking in Energy Star Portfolio Manager	New Phase of Past Project (specify in Description)	Embedded 2013-2015: San Joaquin Valley Clean Energy Organization will benchmark of all utility accounts in Energy Star Portfolio Manager (ESPM) for VIEW partners. Also includes training of local government staff on use of Portfolio Manager.	Public	Cities of Porterville, Tulare and Woodlake and Counties of Kings and Tulare	PG&E / SCE / SCG	January-2015	December-2016	\$13,500 (PG&E) / \$13,500 (SCE) / \$1,400 (SCG)	\$ -	3.1.1. Local Gov't Benchmarking Policies	N/A	Benchmarked portfolios for the County of Tulare and the Cities of Arvin, Corcoran, Dinuba, Hanford, Lemoore, Porterville, and Tulare. All utility accounts will be benchmarked in ESPM. City will use a benchmarking policy to impact procurement and investment decisions, and staff will be trained on program use.	Municipal staff in all local governments enrolled in Portfolio Manager and automated benchmarking services and actively engaged in data analysis.	5	16,441,200	-	
San Joaquin Energy Leader Partnership (AKA VIEW Partnership)	Energy Action Plans	New Phase of Past Project (specify in Description)	Embedded 2013-2015: San Joaquin Valley Clean Energy Organization will create customized Energy Action Plans or Climate Action Plans to fit the needs of individual cities while maintaining a regional focus.	Public Residential Commercial Industrial Agricultural	City of Hanford and County of Kings	PG&E / SCE / SCG	January-2015	December-2016	\$13,500 (PG&E) / \$13,500 (SCE) / \$1,400 (SCG)	\$ -	4.1.2. Customized EAP/CAP	N/A	Council ready EAP. The EAP may or may not be approved by council (concerns regarding document as a planning document exist and are being reviewed by local government counsel). If document is not formally adopted the LG will institute department strategies and use the document as a guiding principle document to influence staff activities.	Adoption, either at council or internally, of a customized energy action plan.	2	-	-	

Project ID		Project Status and Accomplishments to Date						Engagements (This Reporting Period)						Narrative Reporting	Knowledge Transfer	
Partnership Name	Project Name	Project Status	Scope Completed to Date	Scope Remaining to be Completed	Revisions to Project Timeline?	Revisions to Project Budget?	Revisions to Project Scope?	Elected / Appointed Officials	Dept Directors / City Manager	Other local gov't staff	Support Staff / Consultant / IOU / Non	Public / Community Members	Total Engagements	October 2016 Narrative Update (January 1 - June 30, 2016)	Lessons Learned Reporting (Cumulative)	Links to Work Product or Deliverable?
Ventura Energy Leader Partnership	Develop and Implement On-Line Permit Application Program	Complete	1. Assessment Report completed Feb. 2015 2. Software successfully configured to the system 3. Completed User Acceptance Testing 4. Trained staff at each participating County department 5. Completed task March 2016	Completed March 2016	Completed March 2016	None	None	-	7	34	16	-	57	1. Completed Best Practices/Lessons Learned and Final Reports 2. Project completed March 2016	<ul style="list-style-type: none"> <li>The following process worked best when implementing changes:                             <ul style="list-style-type: none"> <li>Conduct initial research and acquire information in preparation for development</li> <li>Purchase and installation of equipment and licenses</li> <li>Execute analysis sessions with each participating County department</li> <li>Work with Consultant to configure software, and</li> <li>Prepare for User Acceptance Testing.</li> </ul> </li> </ul>	<a href="https://vcca.ventura.org/landing.html">https://vcca.ventura.org/landing.html</a>
Western Riverside Energy Leader Partnership	On-Line Permitting	In Progress	1. The on-line permitting system for the City of Perris is installed and operational. The City is promoting the use of the system. 2. The City of Wildomar's on-line permitting system has been enhanced to include a code enforcement module. It has been installed and implemented. 3. Policies and procedure drafted, reviewed, and completed for the City of Perris and Wildomar 4. Compilation of Training materials and training report developed for Utility review 5. Develop Best Practices / Lessons learned report	1. Final Report	To be completed by Nov 2016	None	None	-	2	19	-	-	21	1. The City of Perris is up and running with its new Online Permitting system. On each permit, online information is provided on how future permits can be completed online. 2. The City of Wildomar has provided online permitting services to its residents for a few years, funded by the Phase 2 SP solicitation funding, but per this funding the City enhanced the current Online Permitting system to add code enforcement functions to ensure a higher level of quality control on the energy efficiency projects.	<ul style="list-style-type: none"> <li>City of Perris: The installation of the on-line permitting system has helped the City of Perris provide additional information to applicants that are interested in any rebate incentives that are available for application.</li> <li>City of Wildomar: One of the biggest lessons learned from implementing this system was that it provided a learning growth rate of how to use the module. Users</li> </ul>	<p><b>Perris:</b> <a href="https://aca.accola.com/perris/default.aspx">https://aca.accola.com/perris/default.aspx</a></p> <p><b>Wildomar:</b> <a href="https://permits.cityofwildomar.org/Default.asp?Build=FM.prmPermit.Apply1&amp;Mode=ClearBo&amp;BQName=pmPermit">https://permits.cityofwildomar.org/Default.asp?Build=FM.prmPermit.Apply1&amp;Mode=ClearBo&amp;BQName=pmPermit</a></p>
Western Riverside Energy Leader Partnership	Revolving Energy Efficiency Fund	In Progress	1. Draft RREEF documents prepared for review: RREEF Administrative Manual, Operations Checklist, and Master Purchase lease documents 2. Final RREEF documents: RREEF Administrative Manual, Operations Checklist, Master Purchase lease documents 3. Identifies potential list of energy efficiency projects at municipal facilities	1. Final Report	To be completed by Nov 2016	None	None	-	-	-	-	-	-	1. Completing final deliverables and final report 2. WRCOG will continue to identify energy efficiency projects and promote the Revolving Loan fund as an option for energy efficiency project financing	<ul style="list-style-type: none"> <li>One of the biggest challenges about the Revolving Fund was identifying how to start Program.</li> <li>Cities that are interested in using the funds from this Program will be limited to a certain amount so other interested cities may tap into this fund if they have any EE/Water/Sustainability projects in mind.</li> </ul>	N/A
South Santa Barbara County Energy Leader Partnership	Workshop to Improve Adoption of Reach Codes	Complete	1.1.6 & 5 - Sponsored and developed speaker panels for the Central Coast Sustainability Summit. SCEEP relevant topics included: Energy Breakout session with SB County Energy staff and Geoff Danker from SCG; an Energy Panel on achieving cost savings for municipalities, and a microgrid plan	Completed Dec 2015	Completed Dec 2015	None	None	10	-	22	28	-	60	1. Training completed in 2015	N/A	
San Joaquin Energy Leader Partnership (AKA VIEW Partnership)	Benchmarking in Energy Star Portfolio Manager	In Progress	1. Completed benchmarking for: County of Kings, Cities of Avenal, Dinuba, Hanford	1. Complete benchmarking for Tulare County and Cities of Porterville and Tulare, Corcoran, and Lemoore	Project to continue in 2017 for Tulare County. Project has not been started for Corcoran or Lemoore.	None	None	1	-	4	2	-	7	1. City and county energy accounts have been scrubbed for accuracy and duplicates/dead accounts have been removed from the portfolio 2. Met with city/county staff to review facility characteristics 3. Worked with IOU representatives to collect accurate energy data and set up Automatic Benchmarking for the cities and counties. 4. Benchmarking is now complete for the County of Kings as well as the Cities of Avenal, Dinuba, Farmersville, Hanford, Lindsay, Visalia, and Woodlake.	<ul style="list-style-type: none"> <li>ESPM glitches include a) duplicated SCE data, requiring account review and maintenance when data reports are needed and b) no SCC energy usage cost uploads, prohibiting local government staff and implementer staff to fully report on and analyze usage data.</li> <li>Local governments that lack comprehensive facility inventories add significant workload to the benchmarking process.</li> </ul>	TBD
San Joaquin Energy Leader Partnership (AKA VIEW Partnership)	Energy Action Plans	In Progress	1. Kings County EAP complete; County in review process 3. City of Hanford EAP 70% complete	1. Complete EAP for Hanford. Begin EAP process for all other VIEW jurisdictions.	Project to continue into 2017 as EAPs for 10 VIEW jurisdictions are started.	None	None	-	1	5	3	-	9	1. The County of Kings has completed the development of its EAP and, once the County completes document review, will bring the document to Council for approval 2. The City of Hanford has adopted a CAP independent of the Partnership. The City has completed approximately 70% of its EAP.	<ul style="list-style-type: none"> <li>Each local government requires different language and layouts of EAPs, which can sometimes significantly increase the workload of this project.</li> </ul>	TBD