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2016 Strategic Plan Refresh

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Agenda

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1. Refresh Goals
2. Strategic Plan Process
 - Project Criteria
 - Project Funding
 - Vendor Support/Selection
 - Project Application/Commitment
 - Tracking and Reporting
 - Project Close-out
3. Other Considerations
4. Next Steps

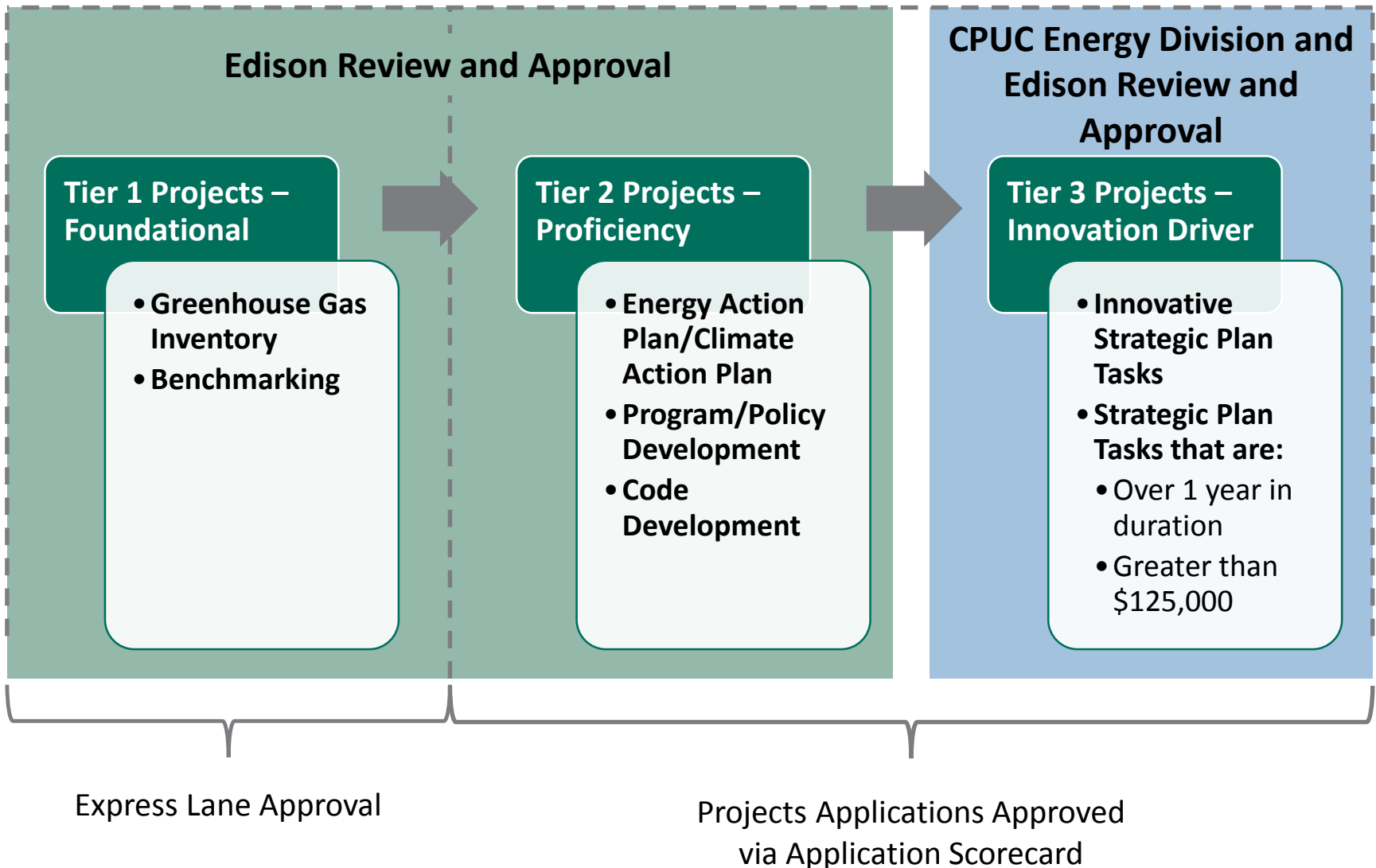
Strategic Plan Refresh Goals

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- Streamline application and approval process
- Provide a consistent application and approval process that incorporates:
 - Applicant commitment
 - SCE Energy Leader Model
 - Past record of success
- Provide Partners with a Strategic Plan path
- Increase effectiveness in producing short- and long-term kWh savings
- Continue to provide value to Partners

Project Criteria

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Tier 1 Projects - Foundational

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- Eligible Tasks

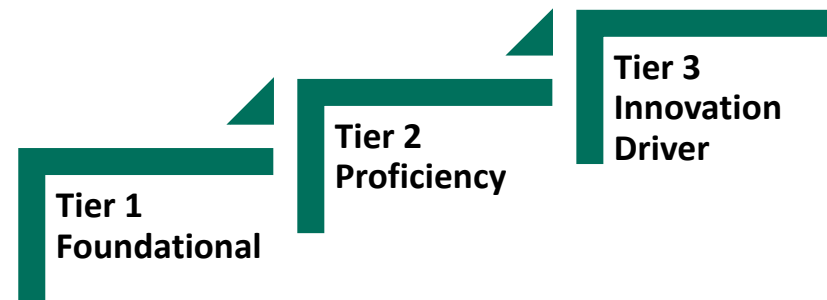
- Benchmarking
- Greenhouse Gas Inventory
 - Municipal
 - Community

- Requirements for Approval (Express Lane)

- ELP Value Level
- Complete Application
- Funding availability

- Project Approval

- Express Lane Approval
 - No scoring criteria



Tier 2 Projects - Proficiency

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• Eligible Tasks

- Energy Action Plan/Energy Chapter of Climate Action Plan
 - Municipal
 - Community
- Program/Policy Development
 - Benchmarking Policy
 - CALGREEN or Similar Policy
 - LEED policy on a case by case basis where some local match is contributed
 - Revolving Loan Fund Program
 - Commissioning/Retro-commissioning Policy
- Code Development
 - Reach Codes
 - Green Building Codes
 - Point-of-sale Codes
 - Other Codes Encouraging EE/DR

• Requirements for Submittal

- ELP Silver Level
- Complete Application
- Decision-Maker Buy-in
- Funding Availability

• Project Approval

- Project Scorecard
 - To Be Developed

Tier 3 Projects – Innovation Driver

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- Eligible Tasks

- Innovative Strategic Plan Tasks
- Strategic Plan Tasks that are:
 - Over 1 year in duration
 - Greater than \$125,000

- Requirements for Submittal

- ELP Gold Level
- Complete Application
- Decision-Maker Buy-in
- Funding availability

- Additional Project Deliverables

- Project Assessment White Paper
- Presentation to SEEC Best Practices Forum

- Project Approval

- Project Scorecard
 - To Be Developed
- Includes:
 - Fall within SP Framework and demonstration of clear goal of EE results
 - Are reasonable in scope, budget, timeline
 - Prospects for success
 - Demonstrate clear project management plan
 - Supplemental funding/likelihood of sustainable funding source
 - Past partners performance
 - Replicability of task

Project Funding and Contracting

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Funding

- **Ratepayer Funding***
 - Distribution expected to be:
 - Tier 1 Projects (20%)
 - Tier 2 Projects (60%)
 - Tier 3 Projects (20%)
 - Pooled and distributed to Partnership budget upon approval
- **Supplemental Funding Sources**
 - A database of potential supplemental funding sources will be developed

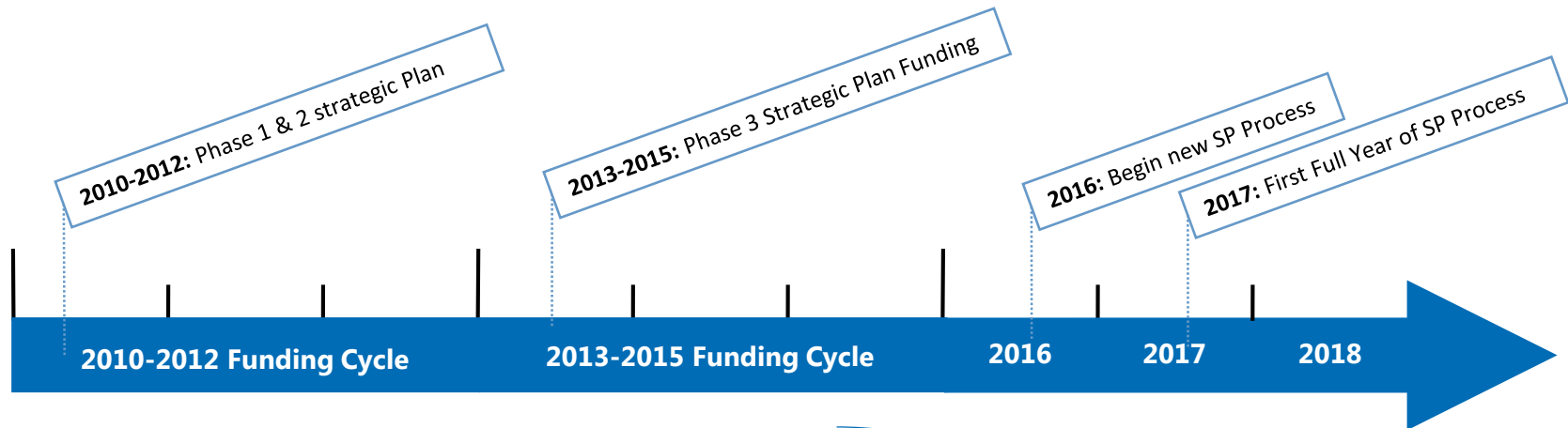
Contracting

- **Stable of Contractors/ Vendors**
 - Identified through RFP
 - Chosen by Partner/Implementer
- **Other Contractual Arrangements** (requires pre-approval)
 - Other vendor needed by LG
 - LG staff

*Capped at 25% of ELP total program funding

Strategic Plan Funding

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• Past SP Funding

- Strategic Solicitation
 - 2010-2012:
 - Phase 1: \$20.6 M
 - Phase 2: \$5.2 M
 - 2013-2015
 - Phase 3: \$3.3 M
- Strategic Plan Embedded
 - 2010-2012: ~\$1.1 M
 - 2013-2015: ~\$500k

• Future SP Funding

- 2016
 - ~\$570k
- 2017
 - ~\$1 M

Project Application and Commitment

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Strategic Plan Project Application

Strategic Plan Project Commitment

Strategic Plan Application

Please complete this application for all requests for funding of Strategic Plan Work. * indicates a required field

1	Partner*	
2	Partnership*	
3	Strategic Plan Task*	<input type="checkbox"/> Tier 1 Project - Fundamental <input type="checkbox"/> Benchmarking <input type="checkbox"/> GHG Inventory <input type="checkbox"/> Tier 2 Project – Proficiency (Policies/Codes) <input type="checkbox"/> EAP/EECAP – Municipal <input type="checkbox"/> EAP/EECAP – Community <input type="checkbox"/> Policy: _____ (Please specify policy) <input type="checkbox"/> Code: _____ (Please specify code) <input type="checkbox"/> Tier 3 Project – Innovation Driver <input type="checkbox"/> Please Specify: _____ (Please specify task number from SP Menu) <input type="checkbox"/> Training* (will be arranged through Energy Education Center) *no application required – email your PM to request
4	4a. Vendor Review (Only for tier 1 or tier 2 Projects)	For tier 1 or tier 2, Have you reviewed the selected vendor list and associated SOWs? <input type="checkbox"/> Yes <input type="checkbox"/> No
	4b. Vendor Type (Only for tier 1 or tier 2 Projects)	Are you willing to work with a vendor from the SCE's vendor pool? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, please attach an Alternative Vendor Justification form
5	Timeline (Only for tier 3 Project)	What is your expected timeline for completion of these proposed tasks?
6	Expected Budget (Only for tier 3 Project)	
7	Key Deliverables *	
8	Key Success Indicators *	What would consider this a success?
8	Have you secured the support of key decision makers? *	<input type="checkbox"/> Yes <input type="checkbox"/> No Start of work is depended on council resolution after approval of application
9	Contact Information *	Name: _____ Email: _____ Phone: _____

Version 3 March 4, 2016

DRAFT RESOLUTION

A RESOLUTION OF THE CITY OF _____ WILL
 BEGIN FOR WORK TOWARDS CALIFORNIA'S LONG
 TERM ENERGY EFFICIENCY STRATEGIC PLAN

WHEREAS, the _____ (“_____”) representing the participating City of _____ supports “energy efficiency” initiatives, policies, and construction standards in order to ensure that our communities follow and encourage sustainable practices; and

WHEREAS, local demand for electricity has grown, and it is expected that demand for electricity will continue to grow in the near future to support a growing population and economy; and

WHEREAS, citizens and businesses spend significant amounts for energy, it makes economic sense and good public policy to encourage energy efficiency in _____ and our community; and

WHEREAS, energy efficiency programs enhance our environment by improving air quality, reducing greenhouse gases and other pollution, and conserving natural resources; and

WHEREAS, it is vital for our community to keep spending locally and to encourage innovations in the way we behave, build, and incorporate energy into our everyday business and personal lives; and

WHEREAS, there is a growing movement within California communities and businesses to improve everyday practices and create more sustainable and “greener” cities; and

WHEREAS, the communities comprised of the _____ Partnership seek to promote innovative methods and state-of-the-art technologies used in the design and construction of new residential and commercial buildings within the region, in order to bring energy and natural resource consumption in line with our sustainability goals; and

WHEREAS, the city of _____ supports the efforts of the California Long-Term Energy Efficiency Strategic Plan (“Strategic Plan”) enhance our environment by improving air quality, reducing greenhouse gases and other pollution, and conserving natural resources; and

WHEREAS, the City of _____ has been a member of the _____ Partnership with Southern California Edison (“SCE”), Southern California Gas Company (“SoCalGas”), and (implementer) _____ to promote energy efficiency and demand side management activities with the participating jurisdictions of the _____ Partnership; and

Over

Project Tracking and Reporting

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- Deliverables

- Planning Report
- Key Deliverable
 - (e.g. EAP, Implementation Report, Code)
- Final Report*
 - Program overview
 - Program accomplishments
 - Budget summary
 - Program planning and implementation
 - Assessment of effectiveness
 - Program challenges
 - Best Practices/Lessons Learned
 - Conclusions and recommendations

*Final Report to be included in Best Practices/ Lessons Learned Report

- Tracking

- Strategic Plan Database
 - Includes budget, deliverables, monthly reports, semi-annual reports
- Semi-Annual Report
 - Tab for Each Tier

Project Close-out

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- **Successful Completion**

- A project is considered complete upon delivery of the Final Report and Final Invoice (where applicable)
- SCE will notify of successful completion in the Semi-Annual Report

- **Cancellation**

- If the project is not meeting expectations:
 - SCE will notify the Partner
- If the project continues to not meet expectations:
 - Notify CPUC ED
 - SCE will cancel the project
 - Record in Semi-Annual Report

- **Withdrawal**

- If the Partner elects to cancel the project:
 - Partner will be required to submit withdrawal letter
 - SCE will cancel the project
 - SCE will notify CPUC ED
 - SCE will record in Semi-Annual Report

- **Strategic Plan Changes to ELP Model**
 - **Silver** – Requirement will be changed from “initiate EAP” to “complete benchmarking or GHG inventory”
- **Refresh of SP Work**
 - Cannot be refreshed more often than once per four years
- **Withdrawn/Cancelled Projects**
 - **Tier 1:** Cannot reapply for tier 1 SP work for 2 years
 - **Tier 2:** Cannot reapply for tier 2 or greater SP work for 2 years
 - **Tier 3:** Cannot reapply for tier 3 SP work for 4 years

Next Steps

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- Please provide Feedback by March 31
- 2016 Transition Period
 - Benchmarking, GHG Inventory, EAPs
 - Applications can begin upon agreement on process with CPUC Energy Division (~April)
 - All other activities
 - Applications can be submitted when RFP is completed (~Q3 2016)
- 2017 SP Refresh Takes Effect
 - New ELP Model Effective

Questions