



## San Mateo County Energy Watch

### **Program Management Plan (PMP) 2010-2012 Program Cycle**

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## PROGAM OVERVIEW

### Introduction

San Mateo County Energy Watch (SMC Energy Watch) is a Local Government Partnership (LGP) between the City/County Association of Governments of San Mateo County (C/CAG) and Pacific Gas & Electric Company (PG&E). SMC Energy Watch goal is to reduce energy usage through energy efficiency in San Mateo County, including twenty cities and the unincorporated areas.

This is a unique partnership in that the City/ County Association of Governments of San Mateo County (C/CAG) is a Joint Powers Authority consisting of all twenty cities and the County in San Mateo County. The Board of Directors includes an elected official from each city (20) and the County. The established structure includes the Board (elected officials), Congestion Management and Environmental Quality Committee (elected officials and public members), Resource Management and Climate Protection Committee (elected officials and public members), and Technical Advisory Committee (city/ County staff). This structure enables direct contact to all levels of management at the city and County government level. C/CAG provides an immediate, proven, and effective structure to market the energy-efficiency programs to local government.

C/CAG has contracted with RecycleWorks, the Waste Management and Environmental Services section of the County of San Mateo's Public Works Department, to staff the Energy Watch program. RecycleWorks staff has expertise in managing countywide environmental programs and currently manages a number of programs including: County Green Business Program, resource conservation at County Facilities and unincorporated areas, environmental outreach and recycling hotline, a Master Composter program, Schools Recycling program, Green Building program, greenhouse gas inventory development, and Landfill and Transfer Station management. Through these programs, RecycleWorks has established working relationships with environmental, planning/building, and public works staff at cities and the County and will leverage these connections, in addition to C/CAG's delivery channels, to encourage participation in the SMC Energy Watch program.

San Mateo County Energy Watch delivers a comprehensive portfolio of energy-efficiency services to public agencies, non-profits, small businesses, and residential customers. These program elements include:

- A direct-install program for lighting and refrigeration measures for public agencies, non-profits, and small businesses
- Comprehensive audits for public agencies and non-profits
- Technical assistance for more complex energy-efficiency projects for public agencies and non-profits through PG&E's Non-Residential Retrofit (NRR) program
- A direct-install program for lighting and weatherization measures for moderately low-income residents



- Climate action program assistance for cities and the County
- Energy-efficiency training and education workshops and classes

## Goals

### Overall LGP Energy Savings Goals

	Overall	Direct Install (Ecology Action)	Non-Direct Install (NRR, Res, etc.)
Gross kW	1,510	810	700
Gross kWh	9,942,000	6,000,000	3,942,000

Year	Gross kW/year	Direct Install (EA) kW/year	Non-DI kW/year	Gross kWh/year	Direct Install (EA) kWh/year	Non-DI kWh/year	Gross Therms/year
2010	453 (30%)	243	210	2,982,600 (30%)	1,800,000	1,182,600	-6,600 (20%)
2011	528 (35%)	284	245	3,479,700 (35%)	2,100,000	1,379,700	-8,250 (25%)
2012	529 (35%)	283	245	3,479,700 (35%)	2,100,000	1,379,700	-18,150 (55%)
<b>Total</b>	<b>1,510</b>	810	700	<b>9,942,000</b>	6,000,000	3,942,000	<b>-33,000</b>

### Non-Energy-Saving Goals:

- Reach out to three sectors – public and non-profit, commercial, and residential – and encourage participation in our program
- Provide energy-efficiency technical assistance and services to the three sectors
- Make it convenient and cost-effective for three sectors to undertake energy-efficiency retrofits
- Support San Mateo County Energy Strategy and its energy reduction goals of 25% below 2005 levels
- Support AB 32, California’s Global Warming Solutions Act, and the California Public Utilities Commission’s Long-Term Strategic Plan
- Advance countywide climate action efforts



- Promote code compliance and development of reach codes
- Leverage PG&E existing programs
- Leverage C/CAG's unique relationships with the cities and the County to promote the program

## RESOURCE PROGRAM ELEMENTS

### Energy-Efficiency Program for Public Agencies & Non-Profits

#### A. Program Description, Objectives, & Services

The objective of SMC Energy Watch's program is to motivate public agencies and non-profits to undertake energy-efficiency retrofits to reduce energy use, save on utility costs, and lead their communities by example. SMC Energy Watch will serve all twenty cities and the County during the program's three-year cycle.

SMC Energy Watch aims to make energy-efficiency retrofits convenient and cost-effective for public agencies and non-profits. Public agencies and non-profits traditionally lack funding to pay for energy-efficiency retrofits, as well as the staff to manage the retrofit process. SMC Energy Watch addresses these needs with the following services:

- No-cost, no-obligation energy audit to determine opportunities for energy and cost savings
- More attractive rates and incentives than if the customer carried out retrofits independently
- A turn-key, direct-install program for the following measures: lighting, occupancy and daylight sensors, LED exit signs, refrigerator strip curtains, and vending machine misers. SMC Energy Watch manages the installation and quality-control process for customers with approved subcontractors
- Assistance with benchmarking buildings, allowing organizations to track their buildings' energy use and utility costs over time
- Retro-commissioning audits through PG&E's Retro-Commissioning program (eligible buildings must be at least 100,000 square feet or must consume 2,000,000 kWh or 50,000 therms per year)
- Technical assistance to identify complex energy-efficiency projects, such as boiler, chiller, or HVAC replacements
- Assistance with PG&E's high-tech energy-efficiency program for projects such as server virtualization and computer power management
- Assistance with PG&E rebate application process
- Assistance in locating additional funding sources for retrofits, including Energy Efficiency and Conservation Block Grants (EECBG) through the American Recovery and Reinvestment Act (ARRA), California Energy Commission, etc.



- For cities and the County – assistance with climate action programs and reach codes (see Strategic Plan Activities section for more information)

## B. Energy Savings Goals

SMC Energy Watch plans to accomplish our overall energy-savings goals by adjusting resources across the three sectors (public/non-profit, commercial, residential) while optimizing the program's cost-effectiveness.

## C. Key Stakeholders and Their Roles and Responsibilities

Key stakeholders for this program element include:

- City/County Association of Governments (C/CAG) of San Mateo:

C/CAG provides management and oversight of the SMC Energy Watch program, including managing the contractors Ecology Action (see below). C/CAG is responsible for all marketing and outreach activities to its member agencies and will assist in motivating them to participate in the program and carry out energy-efficiency retrofits. C/CAG will provide the leads to Ecology Action, and when Ecology Action makes a proposal for an energy-efficiency project, C/CAG will rely on its existing relationships to convince the customer to go forward with the project.

C/CAG is uniquely poised to coordinate outreach and encourage municipal customer participation due to C/CAG's structure, strong relationships with member cities, and proven track record of facilitating successful countywide programs and policy-consensus.

C/CAG's structure consists of a Board of Directors and several committees:

- Board of Directors: C/CAG's Board of Directors consists of an elected official from each city and the County.
- Technical Advisory Committee (TAC): the TAC consists of public works directors, engineers, and planners from the cities and the County. The TAC provides professional recommendations to CMEQ (below) and the Board.
- Congestion Management and Environmental Quality Committee (CMEQ):the CMEQ is made up of elected officials from the cities and representatives from transit agencies and the environmental community. This committee advises the Board on transportation, air quality, and other environmental issues.
- Resource Management and Climate Protection Committee (RMCP): the RMCP is made up of elected officials from the cities and representatives from utilities (water, PG&E, etc.), businesses, and non-profits. The RMCP developed the San Mateo County Energy Strategy, a regional policy document which sets countywide energy conservation goals. All cities in the county adopted the Energy Strategy. The RMCP also provides guidance to the SMC Energy Watch program.



The Board and each committee has monthly meetings, which gives SMC Energy Watch the unique opportunity to promote the program, share success stories, and encourage participation to important government decision-makers.

C/CAG is unique in the region for its ability to access and influence cities in San Mateo County. While other programs have to spend time and resources developing relationships with public agencies, SMC Energy Watch will leverage C/CAG's existing relationships and structure.

- RecycleWorks:

C/CAG has contracted with RecycleWorks, Waste Management and Environmental Services section of the County of San Mateo's Department of Public Works, for management of the SMC Energy Watch program.

RecycleWorks has long-standing relationships with city and County staff through its various programs. For a city to participate in the County Green Business program, the city must designate a staff contact that will be available to assist businesses and be the point of contact for the County Green Business coordinator. RecycleWorks' Green Building program facilitates coordination among cities' planning/building staff that are developing green building ordinances (see Training and Education Activities and Strategic Plan Activities). RecycleWorks has also worked with city staff to provide them with climate action volunteers and to develop their greenhouse gas inventories. RecycleWorks has developed working relationships with city staff through these programs, and SMC Energy Watch will leverage these connections to promote the program.

RecycleWorks staff handles general management and administration, including monthly report and invoicing to PG&E. RecycleWorks staff coordinates outreach and marketing activities, leveraging C/CAG's and its own existing delivery channels, and hosts semi-monthly conference calls and in-person meetings for all program partners.

- Ecology Action:

C/CAG is also partnering with non-profit Ecology Action to coordinate the direct-install program and has contracted with them to provide technical assistance for more complex retrofits through the NRR and RCx programs. As a PG&E third-party implementer, Ecology Action has successfully operated a direct-install program for small businesses for several years, and SMC Energy Watch will leverage that expertise.

Ecology Action will receive customer leads from C/CAG, and then will handle auditing, development of project proposal, customer contracting, installation contracting, customer invoicing, and quality-control/inspection. Ecology Action will track projects and provide data and reporting to C/CAG and PG&E on program performance. Ecology Action will also input invoices into PG&E's Bulk Load invoicing tool for payment.

- PG&E

PG&E is another stakeholder in the SMC Energy Watch partnership. PG&E Local Government Partnership program managers will attend partner meetings and assist C/CAG and Ecology Action in accessing PG&E programs and staff.

PG&E service and sales representatives will provide customer leads, account information for customers, and information on PG&E programs such as Demand





Response. All cities in San Mateo County have one PG&E sales and service representative, who has been working with public agencies in this capacity for many years. SMC Energy Watch will leverage this representative's experience in assisting public agencies carry out energy-efficiency projects, as well as her existing relationships with customers to provide project leads. This single established PG&E Sales and Service Representative provides a significant advantage in marketing these programs.

#### **D. Program Begin and End Dates**

Program start date: January 1, 2010

Program end date: December 31, 2012

#### **E. Marketing and Outreach Plan and Schedule**

##### Objectives:

- Solicit participation from public agencies and non-profits in SMC Energy Watch program
- Serve all twenty cities and the County during the program's three-year cycle
- Make it convenient and cost-effective for public agencies and non-profits to undertake energy-efficiency retrofits

##### Target Audience/ Eligibility Requirements

All public agencies (cities, towns, the County, special districts, etc.) and non-profits in San Mateo County that are PG&E customers are eligible for SMC Energy Watch.

To be eligible for Energy Watch's direct-install program, public agencies and non-profits must be on the A1/A6, A10, and E19V rate schedule.

##### Outreach Activities & Distribution Channels

- SMC Energy Watch will leverage C/CAG's existing delivery channels to promote the program to key decision-makers at public agencies, (see Section C, Key Stakeholders) including:
  - Quarterly presentations and reporting to the C/CAG Board and CMEQ
  - Monthly presentations and reporting to RMCP
  - At least one annual presentation to TAC
  - At least one annual presentation to the City Managers Association
- Kick-off event
  - Mid-2010
  - Introduction of SMC Energy Watch to local government and non-profits
  - To present program, share success stories from 2009, and encourage participation
  - Target audience will be city public works staff, city managers, city environmental coordinators, and elected officials



- Introductory meeting with city and County staff to explain program
- Ongoing meetings with city and County staff as necessary
- Website
  - Developed in 2009
  - Updated with success stories as necessary
- Develop brochure to leave after introductory meeting
- Partially completed downstream/catalog rebate applications will be distributed to public works staff during meetings
- Quarterly e-newsletter
  - Begin in mid-2010
  - Audience: city environmental staff, public works staff, city managers, elected officials
  - Highlight success stories and new programs or resources
  - Objective: to encourage participation in SMC Energy Watch program
- Leverage RecycleWorks Green Business program outreach (to become a certified Green Business, public agencies and non-profits must carry out several lighting retrofits. Often, the cost to carry out these retrofits prohibits the organization from becoming certified. RecycleWorks, therefore, refers organizations to SMC Energy Watch's direct-install program, which can make the retrofits more cost-effective)
- Targeted outreach to information technology staff (emails, meetings, etc.) - ongoing
- Promoting success stories – ongoing and through website, e-newsletter, presentations, etc.
- Mid-program event
  - Mid-2011
  - To share success stories from 2010 and encourage participation
  - Target audience will be city public works staff, city managers, city environmental coordinators, and elected officials

SMC Energy Watch will use the PG&E Co-Marketing Quick Start kit in the creation of all marketing materials and will include all applicable disclosure and auspices language in all marketing materials.

Coordination with other stakeholders, within PG&E and/or external

C/CAG and Ecology Action will work with PG&E program managers and sales and service representatives to identify the program that best serves a public agency's or non-profit's project by offering the most advantageous rebate and/or is the most convenient – SMC Energy Watch, a third-party program, or another PG&E program.



### Marketing Message

SMC Energy Watch has two main marketing messages for public agencies and non-profits:

- Save Money. Save Energy. Help the Environment.
- To Public Works facilities staff: “When you think of an energy-efficiency project, from replacing a chiller to replacing a water heater, call San Mateo County Energy Watch.”

## **F. Strategies/Best Practices**

### Cost-Effectiveness

To achieve a cost-effective program, in which energy savings are high and administrative costs are low, SMC Energy Watch plans to:

- Develop marketing strategies and focus with the appropriate mix of short- and long-term projects to enable the energy reduction goals to be met on a month-by-month basis.
- Secure no-cost audits for public agencies through the California Energy Commission’s Energy Partnership Program
- Leverage audits and technical assistance funded by the Energy Efficiency and Conservation Block Grants (EECBG) through the American Recovery and Reinvestment Act (ARRA)
- Leverage the SMC Energy funding with ARRA, C/CAG and other state and federal sources of funding.
- Continue the volunteer pool that the County developed through a Bay Area Air Quality Management District grant for assistance with benchmarking buildings and other climate action projects
- Utilize C/CAG’s existing relationships with the cities and the County to maintain reasonable outreach/marketing costs
- Work with PG&E program managers to determine the most cost-effective rebate program for individual projects (NRR, RCx, downstream catalog rebates, etc.)

### Comprehensiveness

In order to provide a comprehensive energy-efficiency program for public agencies and non-profits, SMC Energy Watch will:

- Serve all twenty cities and the County over the program’s three-year cycle
- Operate on a city-by-city basis (rather than a project-by-project basis), in which we identify all energy-efficiency opportunities (direct-install and more complex projects) and initiate projects before moving on to serve another city



- Provide public agencies with additional services such as benchmarking and assistance with reach codes, climate action plans, and greenhouse gas inventories
- Provide customers with referrals to other PG&E and outside services and resources (Demand Response, Solar, ICLEI, California Energy Commission, etc.)

### Auditing

In order to ensure that energy audits are conducted most effectively to change customer behavior and drive resource savings, the SMC Energy Watch will:

- Establish a system to effectively track customers, services, and information disseminated to program participants
- Provide leave-behind materials and/or reports of recommendations made for program participants, with the goal of increasing the savings attributable to the program
- Encourage a program design that includes a more in-depth audit experience for participants, providing information such as an analysis of savings potentially achieved and a high-level return on investment analysis
- Follow up with customers after the audit, reinforcing the messages provided through the audit and providing an opportunity for the program to address any questions
- Ensure that auditors have proper training to provide audits effectively
- Secure no-cost audits for public agencies through the California Energy Commission's Energy Partnership Program
- Leverage audits and technical assistance funded by the Energy Efficiency and Conservation Block Grants (EECBG) through the American Recovery and Reinvestment Act

### Benchmarking (municipal customers only)

The San Mateo County Energy Watch partnership will facilitate the California Public Utilities Commission (CPUC) decision that all eligible municipal facilities touched by the partnership will be benchmarked (several municipal building types are not eligible for benchmarking including libraries). SMC Energy Watch will use ENERGY STAR's® Portfolio Manager and PG&E's Automated Benchmarking Service.

To promote municipal facility benchmarking, SMC Energy Watch will provide collateral and outreach, set up training, and provide ongoing assistance. SMC Energy Watch may use volunteers or interns to carry out the municipal facility benchmarking process. SMC Energy Watch carried out a pilot program in 2009 to benchmark municipal facilities. The benchmarking of eligible facilities in two agencies is completed with benchmarking underway at six agencies.



PG&E will provide assistance with collateral, training, and ongoing product support with Automated Benchmarking Service. Furthermore, the PG&E Local Government Partnership (LGP) Benchmarking Tool Kit will provide additional information about the benchmarking program and enabling resources to help cities and other municipalities get started.

#### Community Networking/Neighborhood Sweeps

SMC Energy Watch will share success stories and best practices among public agencies and non-profits through C/CAG's delivery channels (please see Marketing and Outreach Plan and Schedule for more information).

#### Developing Long-Term Relationships

SMC Energy Watch will leverage C/CAG's strong existing relationships with its member agencies and the PG&E sales and service representatives' relationships with their customers. Please see Section C, Key Stakeholder for more information.

#### Building Local Capacity/Local Hiring

SMC Energy Watch's program will increase the energy-efficiency knowledge of city staff and elected officials.

Ecology Action encourages local green job creation by:

- Employing 20 staff in the RightLights program and using local resources for hiring
- Providing energy-efficiency installation work opportunity to 8 local area program contractors and 12 non-program contractors
- Working with local union organizations

### **Commercial Direct-Install Program**

#### **A. Program Description, Objectives, & Services**

This program element's objective is to motivate small businesses to undertake energy-efficiency retrofits to reduce energy use, save on utility costs, and lead their communities by example.

SMC Energy Watch aims to make energy-efficiency retrofits convenient and cost-effective for small businesses that lack funding to pay for energy-efficiency retrofits, as well as the staff to manage the retrofit process. SMC Energy Watch addresses these needs with the following services:

- No-cost, no-obligation energy audit to determine opportunities for energy and cost savings
- More attractive rates and incentives than if the customer carried out retrofits independently
- A turn-key, direct-install program for the following measures: lighting, occupancy and daylight sensors, LED exit signs, refrigerator strip curtains, and vending machine misers.



SMC Energy Watch manages the installation and quality-control process for customers with approved subcontractors

- Assistance with PG&E rebate application process

## B. Energy Savings Goals

SMC Energy Watch plans to accomplish our overall energy-savings goals by adjusting resources across the three sectors (public/non-profit, commercial, residential) while optimizing the program's cost-effectiveness.

## C. Key Stakeholders and Their Roles and Responsibilities

Key stakeholders for this program element include:

- City/County Association of Governments (C/CAG) of San Mateo:
  - C/CAG provides management and oversight of the SMC Energy Watch program, including managing the contractors Ecology Action (see below). While Ecology Action is responsible for marketing and outreach activities to businesses, C/CAG can support Ecology Action's outreach efforts, as needed, by promoting the program to its member agencies through its unique delivery channels. See Energy-Efficiency Program for Public Agencies and Non-Profits, Section C, Key Stakeholders.

- RecycleWorks:

C/CAG has contracted with RecycleWorks, Waste Management and Environmental Services section of the County of San Mateo's Department of Public Works, for management of the SMC Energy Watch program. RecycleWorks staff can also provide outreach support to Ecology Action, as necessary, through its relationships with Chambers of Commerce and its County Green Business program.

RecycleWorks' Green Business program is a partnership of government agencies and utilities that helps local businesses comply with all environmental regulations and take actions to conserve resources and prevent pollution. RecycleWorks has managed the Green Business program for three years. The Green Business program is currently available in eleven cities and the unincorporated County areas, and RecycleWorks will be implementing the program countywide in 2010. For a city to participate in the County Green Business program, the city must designate a staff contact that will be available to assist a business in their jurisdiction through the certification process. Through the Green Business program, RecycleWorks has developed working relationships with these staff contacts, and SMC Energy Watch will leverage these connections to promote the commercial program.

- Ecology Action:

C/CAG is also partnering with non-profit Ecology Action to coordinate this commercial direct-install program. As a PG&E third-party implementer, Ecology Action has successfully



operated a direct-install program for small businesses for several years, and SMC Energy Watch will leverage that expertise.

Ecology Action will handle outreach, auditing, development of project proposal, customer contracting, installation contracting, customer invoicing, and quality-control/inspection. Ecology Action will track projects and provide data and reporting to C/CAG and PG&E on program performance. Ecology Action will also input invoices into PG&E's Bulk Load invoicing tool for payment.

- PG&E

PG&E is another stakeholder in the SMC Energy Watch partnership. PG&E Local Government Partnership program managers will attend partner meetings and assist C/CAG and Ecology Action in accessing PG&E programs and staff. PG&E service and sales representatives will provide customer leads, account information for customers, and information on PG&E programs such as Demand Response.

#### **D. Program Begin and End Dates**

Program start date: January 1, 2010

Program end date: December 31, 2012

#### **E. Marketing and Outreach Plan and Schedule**

##### Objectives:

- Solicit participation from small businesses in SMC Energy Watch program
- Make it convenient and cost-effective for small businesses to undertake energy-efficiency retrofits

##### Target Audience/ Eligibility Requirements

Small businesses in San Mateo County that are PG&E customers.

To be eligible for Energy Watch's direct-install program, businesses must be very small, small, and medium size customers (<200 kW) on the following rate schedules: A-1, A-6, A-10, or E-19V. The program may provide services to large non-residential customers (>200 kW) only upon approval of the PG&E contract manager.

##### Outreach Activities & Distribution Channels

- SMC Energy Watch Website
  - Developed in 2009
  - Updated with success stories as necessary
- RightLights website ([www.rightlights.org](http://www.rightlights.org))
- Leverage RecycleWorks Green Business program outreach (to become a certified Green Business, businesses must carry out several lighting retrofits. Often, the cost to



carry out these retrofits prohibits the organization from becoming certified. RecycleWorks, therefore, refers organizations to SMC Energy Watch's direct-install program, which can make the retrofits more cost-effective)

- Cold-calling
- Contractor and equipment supplier sales channels
- Presentations to trade associations, green business programs, rotary clubs and any other relevant group. The program is always available to answer requests for presentations and seeks out these opportunities
- Brochures

SMC Energy Watch will use the PG&E Co-Marketing Quick Start kit in the creation of all marketing materials and will include all applicable disclosure and auspices language in all marketing materials.

Coordination with other stakeholders, within PG&E and/or external

C/CAG and Ecology Action will work with PG&E program managers and sales and service representatives to identify the program that best serves a public agency's or non-profit's project by offering the most advantageous rebate and/or is the most convenient – SMC Energy Watch, a third-party program, or another PG&E program.

Marketing Message

SMC Energy Watch has one main marketing message for businesses:

- Save Money. Save Energy. Help the Environment
- RightLights general message is: "To schedule your free energy efficiency survey please call today!"

**F. Strategies/Best Practices**

Cost-Effectiveness

To achieve a cost-effective program, in which energy savings are high and administrative costs are low, SMC Energy Watch plans to:

- Develop marketing strategies and focus with the appropriate mix of short- and long-term projects to enable the energy reduction goals to be met on a month-by-month basis
- Partner with Ecology Action to coordinate this program, as Ecology Action has successfully operated a cost-effective commercial direct-install program in the county for several years





- Maintain a mix of delivered measures whose incentives, installation costs, and energy savings effectively and comprehensively achieve energy-savings goals within program budgets

#### Comprehensiveness

In order to provide a comprehensive energy-efficiency program for businesses, SMC Energy Watch will:

- Provide customers with referrals to other PG&E and outside services and resources (Demand Response, Solar, ICLEI, California Energy Commission, etc.)
- Provide customers with recommendations for energy efficiency measures of lighting, refrigeration, gasket, strip curtain and vending controls. These recommendations will not only include the fully rebated measures, but will maximize the rebates available and provide customers with full energy savings opportunities
- Implement quality assurance inspections to ensure that all available measures are being recommended to customers
- Add measures to the program as necessary to provide customers with the most comprehensive measure offerings possible

#### Auditing

In order to ensure that energy audits are conducted most effectively to change customer behavior and drive resource savings, the SMC Energy Watch will:

- Establish a system to effectively track customers, services, and information disseminated to program participants
- Provide leave-behind materials and/or reports of recommendations made for program participants, with the goal of increasing the savings attributable to the program
- Encourage a program design that includes a more in-depth audit experience for participants, providing information such as an analysis of savings potentially achieved and a high-level return on investment analysis
- Follow up with customers after the audit, reinforcing the messages provided through the audit and providing an opportunity for the program to address any questions
- Ensure that auditors have proper training to provide audits effectively

#### Community Networking/Neighborhood Sweeps

SMC Energy Watch will benefit from the networking systems that Ecology Action has in place, such as:



- **Business Community Memberships:** Energy Efficiency Specialists employ a number of strategies of outreach to the business community. Being members of local business associations, chambers of commerce, Rotary Clubs or various industry trade groups is one strategy. Relationships with property management professionals are also very helpful in some areas
- **Contractor/Supplier Relationships:** Close working relationships with contractors is a great community-networking tool in order to cast the nets as wide as possible to cover territory. Many times electrical, refrigeration, gasket and vending contractors and suppliers have their own specific network of contacts and customers to serve
- **Cold-calling:** General ‘cold-calling’ and ‘word-of-mouth’ are the most effective forms of outreach to small- and medium-sized businesses. Energy Efficiency Specialists are assigned territories. RightLights generally estimates that over 50% of customers served with energy efficiency retrofits resulted from the energy efficiency specialist sweeping the area and making personal contact with businesses

#### Developing Long-Term Relationships

- The RightLights program of Ecology Action has a good reputation in the community. Ecology Action of Santa Cruz has worked in the community for 30 years, establishing long-standing relationships through many regionally collaborated conservation projects
- Ecology Action has developed long-term partnerships with program contractors that provide professional retrofit installations and excellent customer service
- SMC Energy Watch will benefit from the overlap of the PG&E program managers and Ecology Action’s direct relationships with other local government partnerships

#### Building Local Capacity/Local Hiring

SMC Energy Watch’s program will increase businesses’ staff energy-efficiency knowledge.

Ecology Action encourages local green job creation by:

- Employing 20 staff in the RightLights program and using local resources for hiring
- Providing energy-efficiency installation work opportunity to 8 local area program contractors and 12 non-program contractors
- Working with local union organizations

### **Residential Direct-Install Program**

#### **A. Program Description, Objectives, & Services**

This program element’s objective is to provide lighting retrofits and weatherization services to moderately low-income households.

Services include:

- Installation of attic insulation



- Installation of high-efficiency lighting
- Weatherstripping and caulking
- Installation of low-flow showerheads

## B. Energy Savings Goals

SMC Energy Watch plans to accomplish our overall energy-savings goals by adjusting resources across the three sectors (public/non-profit, commercial, residential) while optimizing the program's cost-effectiveness.

## C. Key Stakeholders and Their Roles and Responsibilities

Key stakeholders for this program element include:

- City/County Association of Governments (C/CAG) of San Mateo:

C/CAG provides management and oversight of the SMC Energy Watch program, including managing the partner, El Concilio of San Mateo County (see below). While El Concilio is responsible for marketing and outreach activities to residents, C/CAG can support El Concilio's outreach efforts, as needed, by promoting the program to its member agencies through its unique delivery channels. See Energy-Efficiency Program for Public Agencies and Non-Profits, Section C, Key Stakeholders.

- RecycleWorks:

C/CAG has partnered with RecycleWorks, Waste Management and Environmental Services section of the County of San Mateo's Department of Public Works, for management of the SMC Energy Watch program. RecycleWorks staff can also provide outreach support to El Concilio, as necessary, through its residential outreach program. RecycleWorks maintains a successful recycling website ([www.recycleworks.org](http://www.recycleworks.org)) and hotline (888-442-2666) for residents of San Mateo County.

- El Concilio of San Mateo County:

C/CAG is also partnering with non-profit El Concilio of San Mateo County to coordinate this residential direct-install program. El Concilio currently operates PG&E's low-income residential energy-efficiency program in San Mateo County (Energy Partners), and SMC Energy Watch will leverage that expertise. Since 2004, El Concilio has weatherized over 14,500 housing units and provided customer education in San Mateo County.

With five offices throughout the county, El Concilio has many collaborations and partnerships that it leverages to provide outreach and services to over 14,000 clients/customers a year. In addition to the Energy Partners program, El Concilio coordinates Telecommunications Education and Lifeline enrollment, Emergency Provisions for East Palo Alto and Menlo Park, Youth and Young Adults After School and Employment Programs, Promoter/Multi-cultural Education and Employment project, and Diabetes, Metabolic Syndrome and Cardio clinic. El Concilio is the lead agency for WiFi 101, a program for low-income residents that increases access to the Internet, offers training and employment in the technology industry, and provides refurbished computers.



El Concilio will handle outreach, auditing, installation contracting, customer invoicing, and quality-control/inspection. El Concilio will track projects and provide data and reporting to C/CAG and PG&E on program performance. El Concilio will also input invoices into PG&E's Bulk Load invoicing tool for payment.

- PG&E

PG&E is another stakeholder in the SMC Energy Watch partnership. PG&E Local Government Partnership program managers will attend partner meetings and assist C/CAG and Ecology Action in accessing PG&E programs and staff.

#### **D. Program Begin and End Dates**

Program start date: April (tentatively), depending on PG&E contract negotiations with Richard Heath & Associates

Program end date: December 31, 2012

#### **E. Marketing and Outreach Plan and Schedule**

##### Objectives:

- Solicit participation in SMC Energy Watch program from moderately low-income households
- Educate moderately low-income households about energy efficiency

##### Target Audience/ Eligibility Requirements

Eligibility requirements are still under discussion. Households will most likely need to have an income below 200-400% of the federal poverty level to be eligible to participate in the program.

##### Outreach Activities & Distribution Channels

- Door-to-door canvassing/neighborhood sweeps
- Presentations at community sites, schools, etc.
- A multilingual/multicultural staff to serve residents in their native language
- Website
  - Developed in 2009
  - Updated with success stories as necessary
- "Biggest User" Competition: SMC Energy Watch will co-sponsor with RecycleWorks' and Sustainable San Mateo County (SSMC) the "Biggest User" Competition in early 2010 to promote residential energy efficiency. The Biggest User is a contest that asks homeowners to submit their home as the most energy inefficient in hopes of winning a free home performance audit and \$1,000 towards a retrofit.



To show other homeowners how to “go green,” SSMC will film and photograph the improvement process and conduct outreach (web, press releases, etc.). Winners will also host small parties at their home after the retrofits to showcase their green improvements and convince others to undertake similar retrofits. SSMC will select a wide range of homes as winners – from the small cottage to the energy-wasting mansion – so that they can apply the case study to as wide of an audience as possible.

SMC Energy Watch will use the PG&E Co-Marketing Quick Start kit in the creation of all marketing materials and will include all applicable disclosure and auspices language in all marketing materials.

#### Coordination with other stakeholders, within PG&E and/or external

C/CAG and Ecology Action will work with PG&E program managers and sales and service representatives to identify the program that best serves a public agency’s or non-profit’s project by offering the most advantageous rebate and/or is the most convenient – SMC Energy Watch, a third-party program, or another PG&E program.

#### Marketing Message

El Concilio’s marketing message is:

- Save energy and water
- Making homes healthier and more pleasant
- Train the green workforce of tomorrow
- Energy Conservation benefits customers, communities, and the public, private and non-profit sectors

### **F. Strategies/Best Practices**

#### Cost-Effectiveness

To achieve a cost-effective program, in which energy savings are high and administrative costs are low, SMC Energy Watch plans to:

- Select the most cost-effectiveness measures to offer residents
- Partner with El Concilio of San Mateo County to coordinate this program, as El Concilio has successfully operated a cost-effective low-income residential direct-install program in the county for several years
  - El Concilio has a general contractor’s license and been the successful bidder for managing PG&E’s Energy Partners and CARE project since 2004. Since El Concilio’s infrastructure for providing energy-efficiency services is established, they can maintain cost-effective, competitive prices.

#### Comprehensiveness

In order to provide a comprehensive energy-efficiency program for moderately low-income residents, SMC Energy Watch will:



- Provide customers with education about cost-effective energy-efficiency opportunities not included in this direct-install program
- Provide customers information about PG&E and outside services and resources (rebates, Flex Your Power, etc.)
- Provide education in the customer's native language through El Concilio's multilingual/multicultural staff

### Auditing

In order to ensure that energy audits are conducted most effectively to change customer behavior and drive resource savings, the SMC Energy Watch will:

- Establish a system to effectively track customers, services, and information disseminated to program participants
- Provide leave-behind materials and/or reports of recommendations made for program participants, with the goal of increasing the savings attributable to the program
- Encourage a program design that includes a more in-depth audit experience for participants, providing information such as an analysis of savings potentially achieved and a high-level return on investment analysis
- Follow up with customers after the audit, reinforcing the messages provided through the audit and providing an opportunity for the program to address any questions
- Ensure that auditors have proper training to provide audits effectively
  - El Concilio auditors are trained by PG&E at the Stockton training center and must pass all tests in order to receive certificates
- El Concilio's audits serve as interactive education for the customers. The goal of the audits is to identify measures that can be installed that save energy, as well as change customer behavior so they will conserve energy

### Community Networking/Neighborhood Sweeps

El Concilio has long-standing ties with the community developed through providing services to underserved communities since 1980 (see Developing Long-Term Relationships). El Concilio collaborates and partners with many service organizations throughout San Mateo County, including faith-based, health, education, business, public and non-profit organizations.

El Concilio's employees are local residents that live throughout San Mateo County and are part of community activities that including churches, parent associations, businesses, and public/non-profit organizations. El Concilio's staff is multilingual/multicultural, which also helps them connect with the communities they are serving.



To locate customers, El Concilio does door-to-door canvassing/neighborhood sweeps and provides presentations at community sites, schools, etc.

#### Developing Long-Term Relationships

El Concilio was established in 1980 as an umbrella organization of service providers with the mission to improve the quality of life for underserved communities. El Concilio has a track record of successfully serving as a bridge and helping those in need to receive the education, support, and access to services that will ultimately improve the quality of life for children, families, and communities. Their record includes organizing, planning, developing, and implementing programs and serving as fiscal agent for different service collaborations since 1995. Their partners have included, but are not limited to, the County Sheriffs Office; County Medical Center and Clinics; Health, Environmental and Human Services agencies; and other faith-based, private, public, and non-profit organizations. El Concilio has received many awards/resolutions from the San Mateo County Board of Directors, funders, and private, public, and non-profit organizations.

#### Building Local Capacity/Local Hiring

El Concilio's business model is to work with, for, and in the communities we serve. To that end, they partner with local entities and hire local residents throughout San Mateo County. El Concilio's goals include increasing leadership, educational, and employment opportunities.

## **TRAINING AND EDUCATION ACTIVITIES**

### Objectives

- Training and education of municipal elected officials and municipal management and staff
- Bring Pacific Energy Center classes to San Mateo County
- Create a demand for energy-efficiency contractors and building professionals through the A Taste and A Talk series
- Create a supply of building professionals trained in energy efficiency and green building practices
- Leverage RecycleWorks' Green Building program and relationships with building/planning staff at cities and the County

### Target Audience(s)

- Elected officials and municipal management and staff



- Residents (homeowners and renters)
- Building professionals (contractors, architects, etc.)

## **Classes & Workshops**

### **Method of execution**

RecycleWorks currently manages a successful countywide Green Building program that:

- Provides technical assistance to city and County staff to develop green building ordinances
- Facilitates regional consistency of green building ordinances through workshops and meetings for planning/building staff
- Assists city and County staff with green building education and outreach for residents and the building community through trainings, workshops, websites, etc.
- Provides reduced-cost green-building training for municipal building/planning staff

During SMC Energy Watch's 2009 bridge period, SMC Energy Watch co-sponsored a Green Building Certified Professional training in the county with RecycleWorks and brought RecycleWorks Green Building staff and PG&E Codes and Standards staff together to coordinate two local energy-efficiency trainings.

In the 2010-12 program cycle, SMC Energy Watch will continue to work with PG&E's Codes and Standards staff and staff from the Pacific Energy Center to coordinate PG&E trainings in San Mateo County. SMC Energy Watch will coordinate with the non-profit Build It Green on holding Green Building Certified Professional trainings. SMC Energy Watch will locate and reserve the training venues leveraging RecycleWorks' contacts with city staff. SMC Energy Watch will leverage RecycleWorks' Green building Program's contacts to promote the events.

Energy Watch will also work with RecycleWorks and the City of Redwood City to continue sponsoring the A Taste and A Talk series (see Curriculum for more information).

SMC Energy Watch will leverage C/CAG's Boards and committees to provide training and education to key decision-makers at public agencies. Please see Energy-Efficiency Program for Public Agencies & Non-Profits Section C, Key Stakeholder and E Marketing and Outreach Plan and Schedule for more information.





## Schedule

- Quarterly presentations and reporting to the C/CAG Board (elected officials) and CMEQ (elected officials and public members).
- Monthly presentations and reporting to RMCP (elected officials and public).
- At least one annual presentation to TAC (municipal staff).
- At least one annual presentation to the City Managers Association (city/ County managers).
- One initial and ongoing annual meetings with IT staff at the cities and the County.
- SMC Energy Watch will co-sponsor one Certified Green Building Professional training with Build It Green and RecycleWorks during its three-year program cycle. This training occurred in January 2010.
- SMC Energy Watch will coordinate two energy-efficiency trainings annually with PG&E Codes and Standards staff. Dates – TBD.
- The A Taste and A Talk series is held biweekly throughout the year.

## Curriculum

- Certified Green Building Professional training: this training teaches building professionals about the green building products and practices that result in more energy-efficient and -conserving homes. The training assists in achieving compliance with local ordinances. The County's Green Building Ordinance currently requires a Green Point Rater to verify every new construction and significant remodel project, and the CGBP training is a prerequisite for the Green Point Rater certification. Many other cities in the county plan to adopt Green Building Ordinances and will also adopt the Green Point Rated system to verify compliance.
- PG&E Energy-Efficiency Trainings: SMC Energy Watch will work with PG&E Codes and Standards staff and RecycleWorks green building program's contacts to determine which classes are most needed. With the establishment of a countywide financing district for energy-efficiency and renewables and a residential energy-efficiency retrofit program using stimulus funds in 2010, SMC Energy Watch may select trainings that will assist contractors handle the projects created by these programs.
- A Taste and A Talk series: RecycleWorks started this successful green-building educational and networking series in 2008. Held biweekly at Redwood City's City Hall, each workshop brings together architects, contractors, and homeowners for a presentation from expert speakers on making homes energy efficient. Currently each workshop attracts an audience of over fifty attendees.



**Other (e.g. peer-to-peer networking, etc)**

SMC Energy Watch plans to promote best strategies and success stories among C/CAG's member agencies through C/CAG's delivery channels (meetings, reports, etc.) and through SMC Energy Watch's outreach activities (website, events, etc). Please see Energy-Efficiency Program for Public Agencies and Non-Profits, Section E, Marketing and Outreaching Plan.

SMC Energy Watch will also share information and ideas with other Local Government Partnerships. SMC Energy Watch will look for opportunities to share resources and coordinate with Silicon Valley Energy Watch and will also share lessons learned and mentor new partnerships such as the Napa Energy Watch program.

SMC Energy Watch will continue participating and taking advantage of all LGP and Third Party Forums to enhance peer-to-peer networking.

**STRATEGIC PLAN ACTIVITIES**

**Advance Climate Protection and Greenhouse Gas Reduction Programs in San Mateo County**

C/CAG provided funding for all the twenty cities and the County to work with ICLEI to complete their Municipal Greenhouse Gas Inventories, and all 21 municipal inventories are completed. C/CAG also provided funding in conjunction with the Bay Area Air Quality Management District (BAAQMD) for RecycleWorks staff and ICLEI to complete the Communitywide Greenhouse Gas Inventories for the cities and the County. Staff has finished calculating communitywide emissions for each city and the County and will generate and distribute reports by 6/30/2010.

In addition to completing communitywide inventories for each city and the County, RecycleWorks staff also completed the County's municipal inventory and managed the Bay Area Air Quality Management Climate Protection Grant that funded this effort. RecycleWorks, therefore, has the expertise to continue assisting cities with climate action programs through SMC Energy Watch.

C/CAG and RecycleWorks staff plans to support an underway countywide effort to develop a template climate action plan for cities and the County to use in creation of their individual climate action plans.

C/CAG will work with PG&E program managers and sales and service representatives to identify the programs and tools that will enable the cities and the County to implement their Climate Action Plans.

**Support Reach Codes and Code Compliance in San Mateo County of San Mateo**

RecycleWorks currently manages a successful countywide Green Building program that:

- Provides technical assistance to city and County staff to develop green building ordinances
- Facilitates regional consistency of green building ordinances through workshops and meetings for planning/building staff

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- Assists city and County staff with green building education and outreach for residents and the building community through trainings, workshops, websites, etc.
- Provides reduced-cost green-building training for municipal building/planning staff

SMC Energy Watch will leverage RecycleWorks existing programs and relationships with cities to bring more trainings and workshops to the county to create the supply and demand for residential energy-efficiency retrofits (see Training and Education Activities) and facilitate development of green building ordinances in each city.

1 - Local governments lead adoption and implementation of “reach” codes stronger than Title 24 on both mandatory and voluntary bases.

A. The County of San Mateo is working on getting all the cities in San Mateo County to adopt Green Building Ordinances, reaching above Title 24 requirements.

Goal: All 21 jurisdictions adopted by the end of the 2010-12 cycle.

Deliverables: Resolutions of adoption by cities

Budget: \$15,000

B. Identify any ordinances or codes in San Mateo County that hinder the development of reach codes.

Goal: The Energy Watch team is looking out for issued ordinances in any of the jurisdictions in San Mateo County.

Deliverables: Resolutions of adoption by cities

Budget: \$6,000

2 - Strong support from local governments for energy code compliance enforcement.

Bring in expertise from CPUC, CEC and PG&E to provide meaningful workshops for Local Government staff.

Goal: Have at least one inspector from each jurisdiction in San Mateo County attend by the end of 2012

Deliverables: Workshop agendas and attendee lists.

Budget: \$9,000

3 - Local governments lead by example with their own facilities and energy usage practices.



A. Work with all jurisdictions to benchmark all covered building being retrofitted under the SMCEW program (per contract).

Goal: All municipal building attaining rebated under the SMCEW program are benchmarked (if covered in the EPA program).

Deliverables: List of benchmarked buildings.

Budget: \$3,000

B. Facilitate adoption of Climate action plans by 20 cities and the County

Goal: All 20 cities and the County adopting Climate Action Plans by end of 2011.

Deliverables: List of agencies with a completed plan.

Budget: \$24,000

4 - Local governments lead their communities with innovative programs for energy efficiency, sustainability and climate change.

A. Coordinate with working group to develop a regional template and tool for support jurisdiction in the completion of their Climate Action Plans.

Goal: Tool and Template completed in 2010.

Deliverables: Completed Template and Tool.

Budget: \$15,000

B. County of San Mateo will develop a communitywide Climate Action Plan as a reference to its general plan update.

Goal: CAP and General Plan update completed by end of 2012

Deliverables: Completed CAP

Budget: \$9,000

C. As part of our San Mateo County Energy Strategy, complete analysis of energy trends for the cities in San Mateo County and for the county as a whole.

Goal: Conduct and annual analysis per milestones.

Deliverables: Completed Report

Budget: \$12,000



## OVERALL PROGRAM TIMELINE

Timeline	Outreach Activities	Training & Education/Strategic Plan Activities
2010 Quarter 1	<ul style="list-style-type: none"> <li>• 1 presentation &amp; report to C/CAG Board &amp; CMEQ</li> <li>• 3 presentations &amp; report to RMCP (monthly)</li> <li>• Begin outreach campaign to IT staff (emails, intro meetings)</li> </ul>	<ul style="list-style-type: none"> <li>• Certified Green Building Professional training</li> <li>• 2 A Taste &amp; A Talk workshops</li> </ul>
2010 Quarter 2	<ul style="list-style-type: none"> <li>• 1 presentation &amp; report to C/CAG Board &amp; CMEQ</li> <li>• 3 presentations &amp; report to RMCP (monthly)</li> <li>• Kick-off event</li> <li>• Update success stories on website</li> <li>• Develop program brochure</li> <li>• Biggest User contest begins (SSMC is the main coordinator)</li> </ul>	<ul style="list-style-type: none"> <li>• 2 A Taste &amp; A Talk workshops</li> </ul>
2010 Quarter 3	<ul style="list-style-type: none"> <li>• 1 presentation &amp; report to C/CAG Board &amp; CMEQ</li> <li>• 3 presentations &amp; report to RMCP (monthly)</li> <li>• First edition of e-newsletter</li> </ul>	<ul style="list-style-type: none"> <li>• 2 A Taste &amp; A Talk workshops</li> <li>• 2 Codes &amp; Standards energy-efficiency trainings</li> </ul>
2010 Quarter 4	<ul style="list-style-type: none"> <li>• 1 presentation &amp; report to C/CAG Board &amp; CMEQ</li> <li>• 3 presentations &amp; report to RMCP (monthly)</li> <li>• 1 presentation to TAC and City Managers Association</li> <li>• All introductory meetings with each city completed</li> <li>• Update success stories on website</li> <li>• 1 edition of e-newsletter</li> </ul>	<ul style="list-style-type: none"> <li>• 2 A Taste &amp; A Talk workshops</li> <li>• 1/3 of municipal buildings benchmarked</li> <li>• Climate action plan template and tool completed</li> </ul>
2011 Quarter 1	<ul style="list-style-type: none"> <li>• 1 presentation &amp; report to C/CAG Board &amp; CMEQ</li> <li>• 3 presentations &amp; report to RMCP (monthly)</li> <li>• 1 edition of e-newsletter</li> </ul>	2 A Taste & A Talk workshops
2011 Quarter 2	<ul style="list-style-type: none"> <li>• 1 presentation &amp; report to C/CAG Board &amp; CMEQ</li> </ul>	2 A Taste & A Talk workshops



	<ul style="list-style-type: none"> <li>• 3 presentations &amp; report to RMCP (monthly)</li> <li>• Update success stories on website</li> <li>• 1 edition of e-newsletter</li> </ul>	
2011 Quarter 3	<ul style="list-style-type: none"> <li>• 1 presentation &amp; report to C/CAG Board &amp; CMEQ</li> <li>• 3 presentations &amp; report to RMCP (monthly)</li> <li>• 1 edition of e-newsletter</li> <li>• Mid-program event</li> </ul>	<ul style="list-style-type: none"> <li>• 2 A Taste &amp; A Talk workshops</li> <li>• 2 Codes &amp; Standards energy-efficiency trainings</li> </ul>
2011 Quarter 4	<ul style="list-style-type: none"> <li>• 1 presentation &amp; report to C/CAG Board &amp; CMEQ</li> <li>• 3 presentations &amp; report to RMCP (monthly)</li> <li>• 1 presentation to TAC and City Managers Association</li> <li>• Update success stories on website</li> <li>• 1 edition of e-newsletter</li> </ul>	<ul style="list-style-type: none"> <li>• 2 A Taste &amp; A Talk workshops</li> <li>• 1/3 of municipal buildings benchmarked</li> <li>• County Energy Strategy progress report completed</li> </ul>
2012 Quarter 1	<ul style="list-style-type: none"> <li>• 1 presentation &amp; report to C/CAG Board &amp; CMEQ</li> <li>• 3 presentations &amp; report to RMCP (monthly)</li> <li>• 1 edition of e-newsletter</li> </ul>	<ul style="list-style-type: none"> <li>• 2 A Taste &amp; A Talk workshops</li> </ul>
2012 Quarter 2	<ul style="list-style-type: none"> <li>• 1 presentation &amp; report to C/CAG Board &amp; CMEQ</li> <li>• 3 presentations &amp; report to RMCP (monthly)</li> <li>• Update success stories on website</li> <li>• 1 edition of e-newsletter</li> </ul>	<ul style="list-style-type: none"> <li>• 2 A Taste &amp; A Talk workshops</li> </ul>
2012 Quarter 3	<ul style="list-style-type: none"> <li>• 1 presentation &amp; report to C/CAG Board &amp; CMEQ</li> <li>• 3 presentations &amp; report to RMCP (monthly)</li> <li>• 1 edition of e-newsletter</li> </ul>	<ul style="list-style-type: none"> <li>• 2 A Taste &amp; A Talk workshops</li> <li>• 2 Codes &amp; Standards energy-efficiency trainings</li> </ul>
2012 Quarter 4	<ul style="list-style-type: none"> <li>• 1 presentation &amp; report to C/CAG Board &amp; CMEQ</li> <li>• 3 presentations &amp; report to RMCP (monthly)</li> <li>• 1 presentation to TAC and City Managers Association</li> <li>• Update success stories on website</li> <li>• 1 edition of e-newsletter</li> </ul>	<ul style="list-style-type: none"> <li>• 2 A Taste &amp; A Talk workshops</li> <li>• 1/3 of municipal buildings benchmarked</li> <li>• All 20 cities and the County adopt reach codes</li> <li>• All 20 cities and the County adopt climate action plans</li> <li>• County of San Mateo communitywide climate action plan and General Plan update adopted</li> </ul>



## COORDINATION PLAN

SMC Energy Watch will continue to work closely with PG&E program managers and appropriate sales and service representatives to provide customers with comprehensive information about PG&E resources and programs for which they may be eligible – Demand Response, Climate Smart, downstream rebates, NRR/RCx, a Third-Party Program, High-Tech Energy-Efficiency incentives, etc. SMC Energy Watch’s website offers links to other PG&E programs, as well as outside resources, for each targeted sector – public, commercial, and residential.

SMC Energy Watch partnered with PG&E’s Codes and Standards staff last year on two energy-efficiency trainings held in San Mateo County and plans to continue working with Codes and Standards during the 2010-12 program cycle to bring more trainings into the county.

SMC Energy Watch is available to partner with the Green Communities program on any pilot programs. Our municipal customers have especially expressed interest in the On-Bill Financing Pilot.

## PROGRAM MANAGEMENT ACTIVITIES

### Roles and Responsibilities – PG&E and Partner

#### C/CAG & County

- Richard Napier, Executive Director, C/CAG  
Responsible for program oversight and management, contract management.
- Kim Springer, Resource Conservation Programs Manager, County of San Mateo, RecycleWorks  
Responsible for lead program design and management, management of strategic plan activities, budget, supervision of staff.
- Alexis Petru, Energy Officer, County of San Mateo, RecycleWorks  
Responsible for outreach and marketing activities, design and implementation of public agency direct-install program, design and implementation of strategic plan activities, education and training activities, reporting to PG&E.

#### PG&E

- Kathy Lavezzo, Sales and Service Representative for all cities and the County  
Responsible for accessing PG&E programs such as Demand Response and Climate Smart, customer account information, customer leads.
- Marvin Nushwat and Kerynn Gianotti, LGP Program Managers  
Responsible for accessing PG&E Programs such as Codes and Standards and Green Communities, contract and program management.



#### Ecology Action

- Brian Kimball, Energy Manager  
Responsible for overall program management of the RightLights and Energy Watch programs. Serves on C/CAG's Resource Management and Climate Protection (RMCP) Committee.
- Noelle Bell, Installation Manager  
Responsible for assisting with program management, as well as installation management duties for the program to ensure proper installation, customer satisfaction and reporting to PG&E.
- Paul Leow, Energy Efficiency Specialist  
Responsible for audits of public agencies and non-profits, proposal development, project management, customer satisfaction with installation and project tracking.

#### El Concilio of San Mateo County

- Ortensia Lopez, Executive Director  
Responsible for overall program administration and management of education and residential direct-install program and project tracking. Serves as liaison with PG&E and Richard Heath & Associates contractor administrator.
- Gloria Samayoa, Energy Specialist Supervisor  
Responsible for management and coordination of Energy Specialist activities including outreach, education, enrollment of customers, QA of paperwork, and follow-up with customer issues.
- Alonzo Lopez, Weatherization Supervisor  
Responsible for management of weatherization crews, training, handling technical issues with PG&E inspectors, follow-up corrections, and QA inspection of weatherization work
- Joaquin Narvaez, Crew Lead Supervisor  
Responsible for coordination of work schedule with scheduler, distribution of work for crews and paperwork. Supervises day-to-day crew activities.
- Lisa Correa, Billing and Invoicing Coordinator  
Responsible for billing and invoicing tasks to PG&E.
- Nancy Perez, Scheduling  
Responsible for scheduling of work and enrollment of customer on PG&E system.
- Juan Cintora, Inventory clerk  
Responsible for ordering of supplies and inventory of materials.





- Carol Hatten, Administrative Assistant  
Responsible for preparation and submittals of monthly reports to PG&E, “train the trainer” for program activities, customer complaints, home assessment paperwork and transmittals, referrals, and enrollment of customer on PG&E system.

- Staff auditors/Energy Specialist  
Responsible for providing education and assessment of homes.

- Weatherization Crews  
Responsible for installation of weatherization measures.

- Tim Minahan, Accountant  
Responsible for overall financial management and transactions related to Energy Partners Program.

### **Meetings**

SMC Energy Watch will actively participate in the following meetings:

1. Kick-off meeting – Prior to starting Work, C/CAG will attend a kick-off meeting with the PG&E Program Manager and other partnership stakeholders to meet and review all aspects of the Work and the PMP.

2. Work Status Meetings – C/CAG will participate in meetings, as requested by PG&E, to review Work progress. C/CAG will be available to attend meetings and present requested information, if asked by PG&E, at no additional cost to PG&E.

3. Weekly Meetings – C/CAG, the County, Ecology Action, (El Concilio of San Mateo, if applicable), the PG&E Program Manager, and the PG&E Sales & Service Representative for the cities will participate in two meetings per month: an in-person meeting the first Thursday of each month at 10-11:30 am at County offices in Redwood City and a conference call the third Thursday of each month at 10-11am, PST. During the meetings, partners will discuss program activities, implementation progress and issues, and contractual issues.

### **Communications**

Alexis Petru, Energy Officer, will be the main contact between C/CAG and PG&E staff regarding program planning, management, reporting, and coordination issues. The Program Manager will attend all required Partnership meetings, or send an appropriate replacement in the event of an unavoidable conflict. Alexis Petru can be reached at [apetru@co.sanmateo.ca.us](mailto:apetru@co.sanmateo.ca.us) or (650) 599-1403.

Most communications with PG&E Customer Energy Efficiency will be conducted through email via the Alexis Petru. Coordination on customer account information will be handled through email and phone with Kathy Lavezzo, or another designated PG&E representative.



**Reporting:**

Report	Due Date	Frequency
Monthly Reports/Invoices	15 <sup>th</sup> day of each month following the reporting month	Ongoing throughout length of contract
Quarterly Reports	45 calendar days after the end of each quarter	Ongoing throughout length of contract
Annual Reports	Due by March 31 <sup>st</sup> of each year 2011 and 2012	Twice
Final Report	February 28, 2013	Once

**QUALITY ASSURANCE AND QUALITY CONTROL PLAN**

**Complaint/Dispute Resolution Procedures**

In the event that the Customer has any questions, complaints or disputes regarding the 2010-2012 San Mateo County Energy Watch Partnership Program, the Implementer (Partner or one of its subcontractors) will contact the customer within 5 business days to begin to answer and resolve the customer’s questions or complaints. The complaint will be resolved within 10 business days of the Program receiving it, with a complaint considered resolved when the Implementer has chosen a reasonable course of action that has been communicated to, and agreed upon by, both the customer and PG&E Program Manager.

**Appealing Complaints to the PG&E Program Manager**

In the event that it is not possible to resolve the question or complaint during this timeframe, the Implementer will contact the PG&E Program Manager within 48 hours, and will determine with PG&E’s concurrence the appropriate steps required for dispute resolutions. The Customer may be requested to state in writing the date, time, exact location, persons involved, specific nature of complaints, amount of any loss, and any other information relevant to the complaint so that this information may be delivered to the PG&E Program Manager for consideration. The PG&E Program Manager shall investigate the claim and make a determination of the final disposition of the complaint.

If the Implementer believes a reasonable solution to a complaint exists, but the Customer is unsatisfied with the proposed solution, the matter will be reported to PG&E, and the PG&E Program Manager will have 10 business days to recommend a solution to the issue.

**Resolving Customer Complaints**

If the Implementer is determined to be at fault, the Implementer shall remedy the claim at its own cost. The Implementer shall abide by the PG&E Program Manager’s decision. Claims



shall be remedied within 10 business days of final resolution, unless the PG&E Program Managers agrees to an alternate timeframe.

If PG&E's Program Manager determines the Implementer has not resolved a reasonable complaint within 10 business days of notification of the complaint, PG&E, at its option, may retain a third party to make the necessary correction.

### **Tracking Customer Complaints**

The Implementer shall maintain a log of all customer complaints it receives. Implementer will notify PG&E within 24 hours of any customer complaint received. Implementer shall retain that log in electronic form for at least 3 years after the end of the contract term or receipt of final payment, whichever is later. The Implementer shall record notice of receipt of complaint and the resolution status in Monthly Reports.

### **Customer Feedback Surveys**

#### **Public Agency and Non-Profit Energy-Efficiency Program and Commercial Direct-Install Program (Ecology Action)**

Ecology Action's Energy Efficiency Specialist, upon their final inspection, does a verbal survey of the customer. Please see attached Ecology Action Customer Feedback Form. This ensures that not only is the installation accurate and complete, but that the customer is also satisfied with the process, the contractor, the program and their installation.

#### **Moderate-Income Residential Direct-Install Program (El Concilio of San Mateo County)**

As the current provider for low-income energy-efficiency services in San Mateo County, El Concilio of San Mateo County does monthly random quality-assurance surveys with a portion of customers and compiles the collected information into a report. El Concilio will also carry out these surveys for SMC Energy Watch's moderate-income direct-install program.

The surveys are generally conducted via a phone call: El Concilio calls customers at random to conduct the survey and if a customer calls in with questions, El Concilio surveys the customer.

PG&E also carries out quality-assurance through random phone surveys and asks customers about the education they received, the measures that were installed, dress attire and identification badges of the auditor, and customer service received. PG&E reports back to El Concilio on these surveys. If El Concilio receives a certain number of complaints or negative reviews, their contract is jeopardized.

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## APPENDIX

- Ecology Action Customer Feedback Form
- Agreement between C/CAG and County
- Agreement between C/CAG and County - Amendment
- C/CAG Contract with Ecology Action