



SoCalGas Residential Manufactured Home

Program Implementation Plan

SCGMH
PROGRAM POLICY AND PROCEDURES MANUAL

1. OVERVIEW	3
Program Goals and Objectives	3
Program Contacts.....	4
Organization Chart	5
Double Counting of Energy Savings	6
Oversubscription.....	6
Program Documents	6
2. PROGRAM TIMELINE	7
Meetings	7
Deadlines.....	7
Reports.....	8
3. PROGRAM INSTALLATION PROCESS	8
Energy Specialist Steps	8
Data Manager Steps	8
Installer Steps	9
General Workflow Diagram.....	10
Program Flow Chart.....	11
4. CUSTOMER ELIGIBILITY AND RESPONSIBILITIES	12
Eligible Customers and Customer Sites	12
Verification of Eligibility.....	12
Customer Responsibilities	12
Contractor Responsibilities	13
5. ELIGIBLE EFFICIENCY MEASURES.....	14
Equipment Specifications	14
6. INCENTIVE TABLES.....	15
Workpapers.....	16
Software Tools	16
Calculation Methodologies.....	16
7. INSTALLATION STANDARDS	17
Retrofit Measures	20
Electrical Permits, Codes & Certifications.....	21
Insurance Requirements.....	21
Safety.....	22
Disposal, Recycling and Demolition.....	22
Final Acceptance	22
Correction.....	23

8. PROGRAM PACKAGES AND CUSTOMER COSTS	24
9. QUALITY CONTROL AND INVOICING PROCESSES.....	24
M&V Plan	24
10. MISCELLANEOUS TOPICS.....	25
Disadvantaged Worker Plan.....	26
11. DEFINITIONS.....	27
12. APPENDIX A: Appliance Data Collection	30
13. APPENDIX B: Supporting Documents.....	32

1. OVERVIEW

Introduction

Herein will be the implementation plan that will be adhered to by all employees of Staples Energy in fulfilling the marketing, customer enrollment and install services of the SoCalGas program for 2020 through 2023 program years.

The SCGMH program is implemented by Staples Energy on behalf of SoCalGas and is funded by California ratepayers. The Program is designed to provide turn-key energy efficiency services to mobile or manufactured home residents in the SCG service territory.

This program will allow for mobile and manufactured home residents to overcome the historical barriers to energy efficiency by providing access to affordable and no-cost pre-qualified installation and quality retrofits that maximize energy savings at each site by using proven products and technologies. The Program further facilitates energy improvements by providing the customer with a package of services through one point of contact.

This Program also promotes local economic development by employing local staff and helping SCG customers lower their gas bills. The Program provides customers with further information on other low-cost and no-cost energy efficiency measures, demand side and other programs that are relevant to customer needs for saving energy.

Manufactured Home Program Goals and Objectives

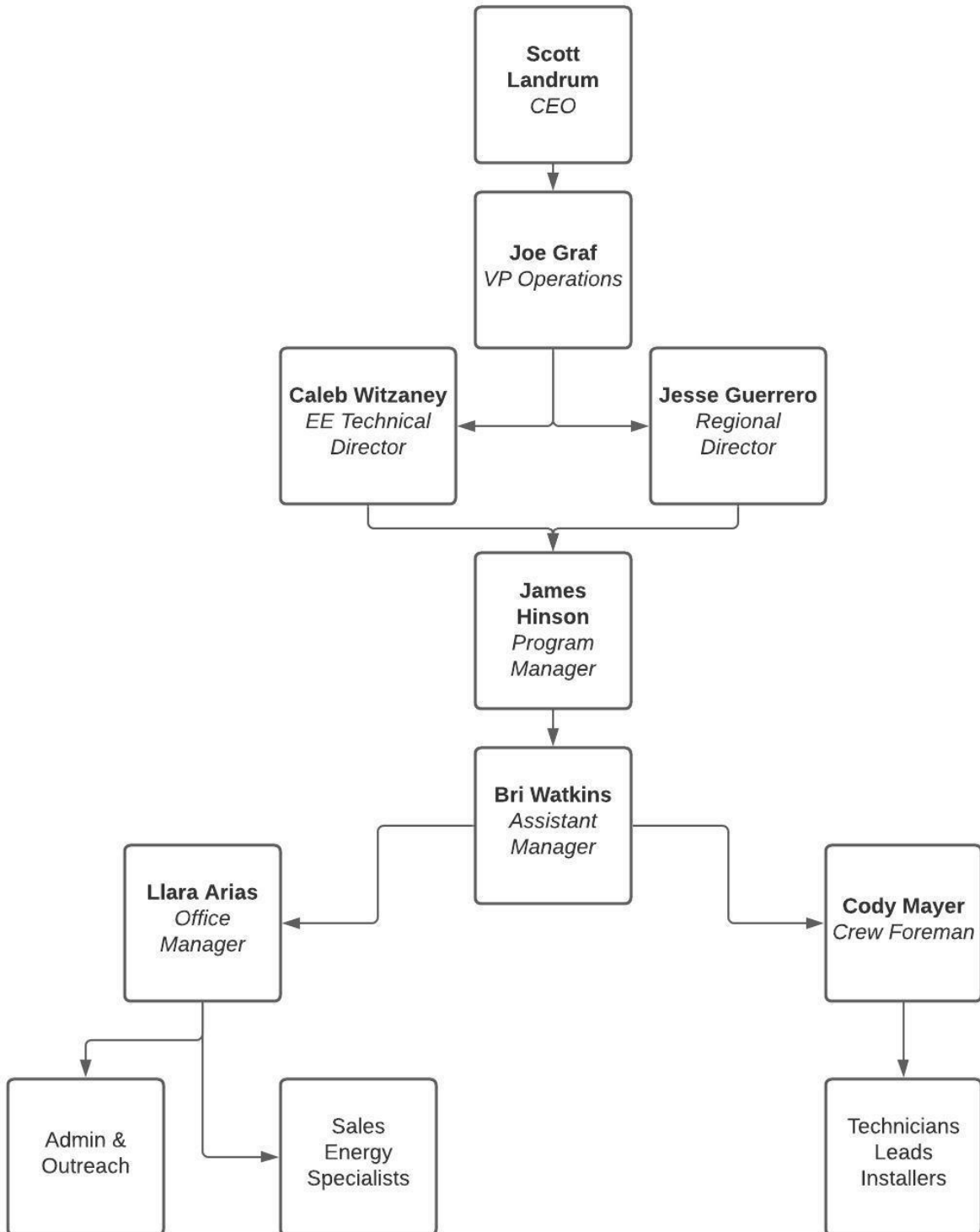
The objective of this Contract is for Staples & Associate DBA Staples Energy to help SCG meet its procurement needs through the administration and implementation of Energy Efficiency Measures (Measures). Staples Energy shall be responsible for the installation of Measures as specified in the Contract.

The Program runs from April 1st, 2021 through December 31st, 2023.

Program Details: Please refer to the California Energy Data and Reporting System (CEDARS) for the following program details:

- a. Program Budget
- b. Program Gross Impacts Table
- c. Program Cost Effectiveness (TRC and PAC)
- d. Type of Sub-Program Implementer
- e. Market Sector
- f. Sub-program Type
- g. Intervention Strategies (Upstream, downstream, midstream, direct install, non-resource, finance, etc.)

Staples Energy Organization Chart



Double Counting of Energy Savings

Double counting of energy savings toward use in other energy efficiency programs is prohibited. For measures installed through the program, SoCalGas customers, contractors, subcontractors, or agents of contractors may not apply for or accept rebates, incentives, or financial assistance from other programs, pilots or demonstration projects funded by the Public Goods Charge Fund or any other State funds.

Customer Responsibility: By enrolling in the Program, the Customer agrees not to seek reimbursement from any other energy efficiency program for the same measures rebated under the Residential Manufactured Home Program. The Project Installation Agreement shall clearly state this rule and state that the Customer is responsible for reimbursing the Program should they receive other incentive payments for the same installations.

Contractor Responsibility: The installation Contractor may not double count energy savings with any other energy efficiency program. Contractors will not be paid by the MFH Program if double counting occurs. It is within the Program Manager's sole discretion to determine whether double counting has occurred.

Oversubscription

SoCalGas incentivized measures are available on a first-come, first-served basis. With monthly review of goals and budgets, oversubscription will not be allowed to occur. In the unlikely event that funds are not available to serve eligible and interested customers, the Program Manager reserves the right to allocate incentives in a manner that maximizes energy savings and customer satisfaction. Any unserved customers will be referred to other existing SoCalGas rebate programs.

Program Documents

The following reports and agreements will be used in the Program:

- 1. Customer Authorization Form**

Each customer must complete this form in order to obtain a free Energy Assessment. This agreement extends access privileges to Program representatives sufficient to perform audits, verify eligibility for various energy efficiency measures, install measures and for SoCalGas or subcontractors to perform subsequent inspections.

- 2. Energy Efficiency Assessment Report**

Staples Energy will generate for each customer an Energy Efficiency Upgrade Summary and Report containing recommended measures and other upgrade specifications for their home, estimated project costs, Customer fee, annual energy savings, project payback period and related information.

- 3. Project Installation Agreement**

This form acknowledges that the Customer has agreed to the installation of the selected measures quoted by Staples Energy.

4. Customer Work Order Acceptance

Customers wishing to install the proposed project will be required to sign this Agreement confirming the installation of the energy efficiency measures and adhering to the other stated requirements of the program.

5. Change Order Agreement

The Change Order Agreement is comprised of 1) a new Customer Work Order and Summary Report, and 2) a new Contractor Work Order which are produced by Staples Energy based on the specified changes to the original Customer Work Order Agreement. The new paperwork is marked "Change Order #(X)" and individual equipment changes are called out accordingly. The Customer must sign to accept the changes, except those totaling less than \$100, which can be initiated with the Customer's verbal authorization.

2. PROGRAM TIMELINE

Timeline

The following report will be the guideline for program deliverables as well as key milestone dates and deadlines:

Meetings

- Staples will hold internal planning ramp up meetings on a regular basis to discuss program needs including but not limited to
 - o Staffing
 - o Measures
 - o Training
 - o IT development and implementation
 - o Sales training
 - o Administrative
- Staples will work collaboratively with SoCalGas program manager(s) in all scheduled meetings on a weekly or biweekly basis and be available for meetings where needed in addition to.

Dates & Deadlines

- Staples will be responsible for meeting deadlines as outlined in our terms and conditions and set forth from program manager(s) on a regular and ongoing basis. Staples will communicate with partners on progress of activities in advance should deadlines not be met as scheduled and mitigate future delays on deadlines.
- PIP
- Program manual
- Ramp up plan
- EOY installation deadline
- EOY invoicing deadline

Reports

- Staples will provide SoCalGas with information on the prior period's activities, accomplishments and expenditures relating to program development, implementation, and execution.

- The Following are Monthly and Annually
 - Program costs and invoicing (reported monthly, and annually)
 - Program impacts (reported monthly and annually)
 - Program penetration (reported monthly and yearly)
 - Monthly Program Report (program updates, success, opportunities, program changes)
- The Following are provided Annually
 - Portfolio Benefit Cost Metrics
- The following metrics will be used to evaluate the Program
 - Therms savings monthly goals
 - Monthly unit allocation and budget goals
 - Customer satisfaction reviews
 - Cost effectiveness in TRC and PAC from CEDARS
 - DAC customer enrollment percentages

3. PROGRAM INSTALLATION PROCESS

The following is an abbreviated summary of the various steps involved in the auditing, managing and installation process for this Residential Manufactured Home Program.

Energy Specialist (ES) Steps

1. Slipstream/Staples Energy performs outreach, schedules customer for specific time to meet with Staples Energy Specialist.
2. ES meets with customer at home at scheduled time, describes measures customer may qualify for before performing at home comprehensive audit.
3. ES performs Job Safety Analysis (JSA)
4. ES uses one wall approach to qualify customers for both Tier 1 and Tier 2 measures. Measures are logged accordingly with in Staples Energy Snapshot tool.
5. ES installs Tier 1 measures during initial visit and are moved to invoicing
6. ES Tier 2 measures are accepted by customer (FAU, Water Heater)
7. Work plan is created, and payment plan is agreed upon.
8. Customer Signs agreements

Data Manager Steps

1. Customer record verified with Tier 1 and Tier 2 accepted measures
2. Tier 1 measures are invoiced per program processes
3. Product ordered for Tier 2 Measures
4. Necessary Permits are created and filed for Tier 2 Measures
5. Necessary Permits are received and verified
6. Data Manager/Scheduler sets appointment time for install of accepted Tier 2 measures

Installer Steps

1. Installer(s) meets customer at scheduled appointment time
2. Lead Installer performs Job Safety Analysis (JSA)

3. Installer(s) complete tier 2 measure installs and submit data in Energy Snapshot
4. Installer(s) review installed measures with customer as well as complete any warranty information
5. Installer receives payment for agreed upon installations

Quality Assurance

1. Staples performs customer satisfaction survey
2. Staples performs post installation scheduled quality inspection

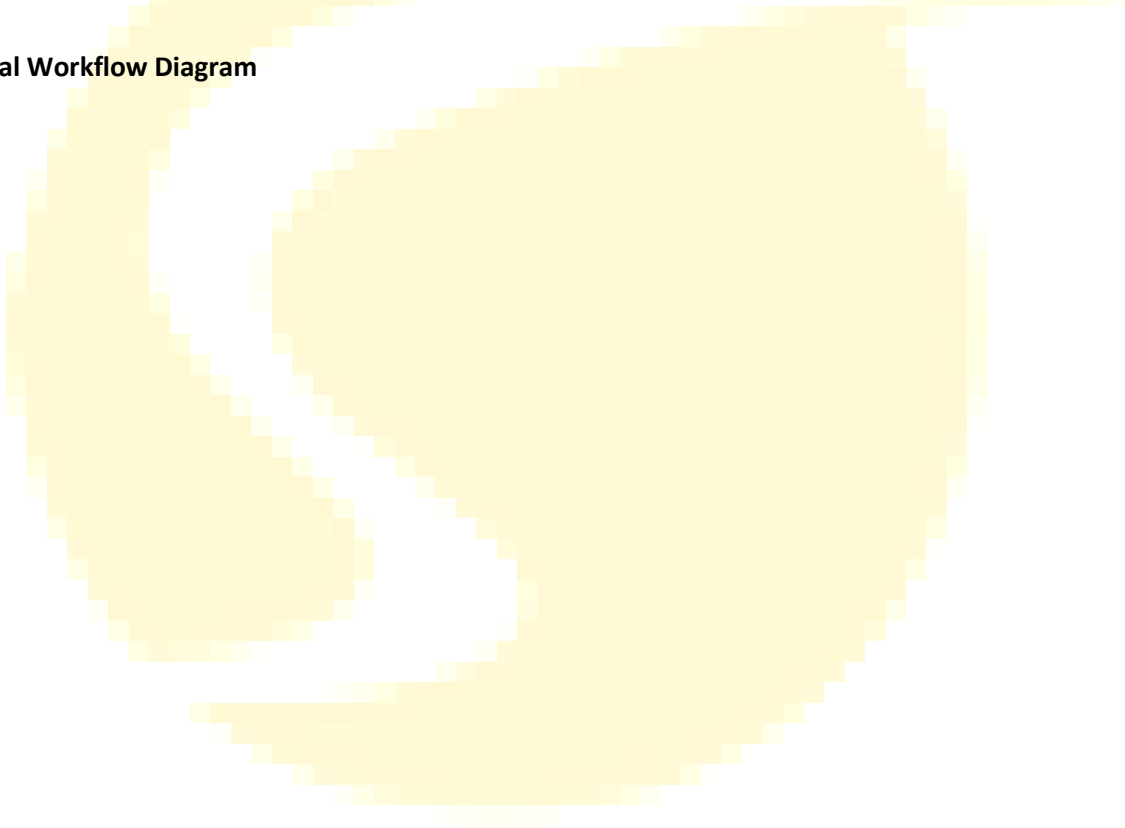
Data Manager

1. Data Manager reviews measures in Energy Snapshot tool
2. Data Manager submits project to invoicing

External QA performed by SoCalGas

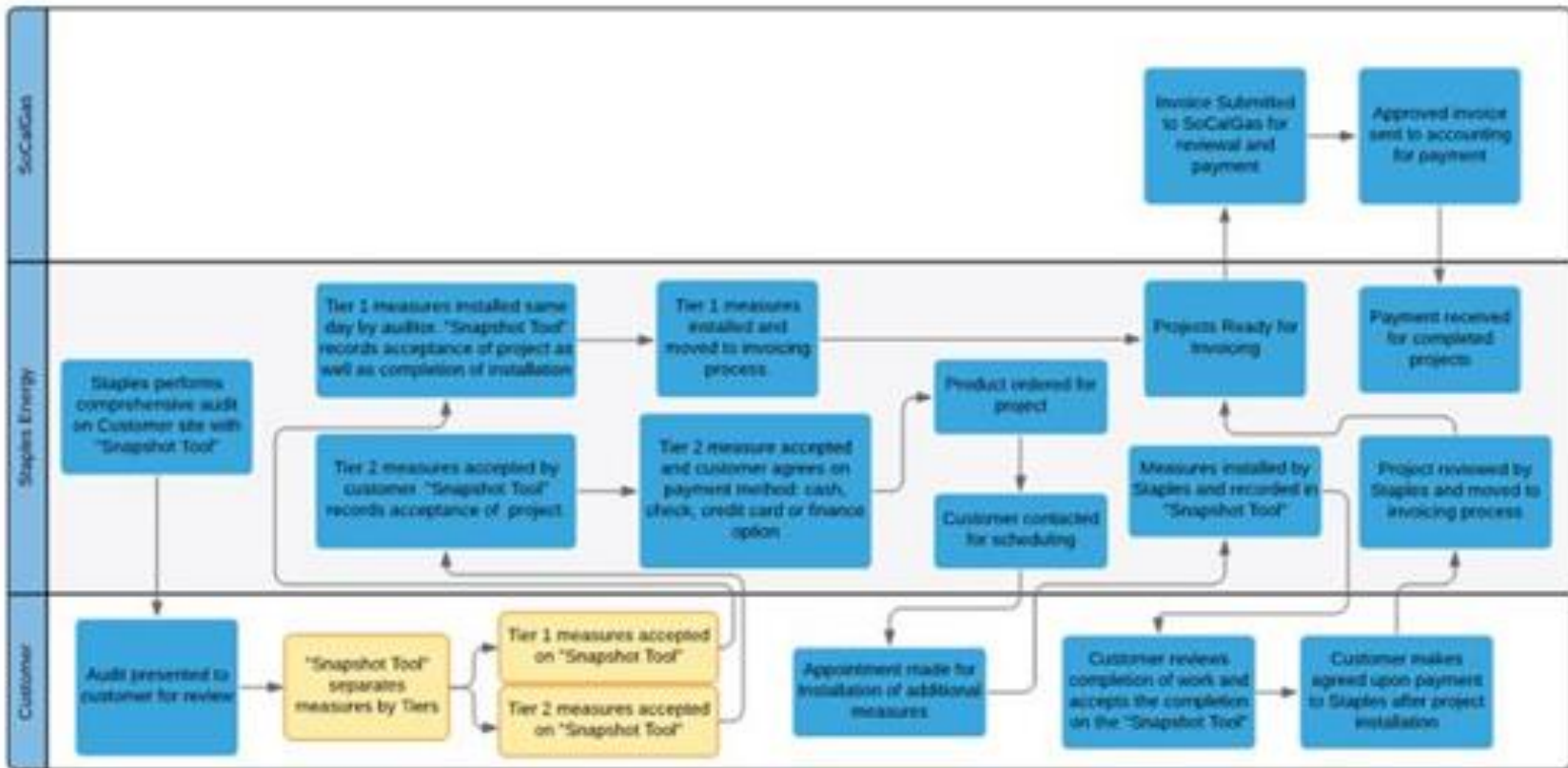
1. Process and timeline not available currently.

General Workflow Diagram





Program Flow Chart Visual



4. CUSTOMER AND CONTRACTOR ELIGIBILITY AND RESPONSIBILITIES

Eligible Customers and Customer Sites

Staples Energy may provide services to any residential customer dwelling in a manufactured home unit within the SoCalGas service territory. Definitions for a manufactured and mobile home unit can be defined as the following:

"Manufactured home," for the purposes of this part, means a structure that was constructed on or after June 15, 1976, is transportable in one or more sections, is eight body feet or more in width, or 40 body feet or more in length, in the traveling mode, or, when erected on site, is 320 or more square feet, is built on a permanent chassis and designed to be used as a single-family dwelling with or without a foundation when connected to the required utilities, and includes the plumbing, heating, air conditioning, and electrical systems contained therein. "Manufactured home" includes any structure that meets all the requirements of this paragraph except the size requirements and with respect to which the manufacturer voluntarily files a certification and complies with the standards established under the National Manufactured Housing Construction and Safety Act of 1974

"Mobile home," for the purposes of this part, means a structure that was constructed prior to June 15, 1976, is transportable in one or more sections, is eight body feet or more in width, or 40 body feet or more in length, in the traveling mode, or, when erected onsite, is 320 or more square feet, is built on a permanent chassis and designed to be used as a single-family dwelling with or without a foundation system when connected to the required utilities, and includes the plumbing, heating, air conditioning, and electrical systems contained therein. "Mobile home" includes any structure that meets all the requirements of this paragraph and complies with the state standards for mobile homes in effect at the time of construction. "Mobile home" does not include a commercial modular, as defined in Section 18001.8, factory-built housing, as defined in Section 19971, a manufactured home, as defined in Section 18007, a multifamily manufactured home, as defined in Section 18008.7, or a recreational vehicle, as defined in Section 18010.

Source: United States Department of Housing and Urban Development Manufactured Home Construction and Safety Standards Act

Verification of Eligibility

Providing proof of eligibility status is the responsibility of the Customer. Proof of eligibility can be a current SoCalGas bill showing customer gas codes. A list of eligible Customers may also be provided by SoCalGas.

Customer Responsibilities

Customers must provide all requested information needed in order for the Program representatives to develop accurate energy savings reports and to process all Staples Energy Government Partnership paperwork. Additionally, customers should be available for all scheduled appointments with Program representatives, must sign and abide by all required agreements, and agree to make timely payment to Staples Energy for the non-incentivized portion of the total project installation costs.

Contractor Responsibilities

As prime contractor for the Residential Manufactured Homes Program, Staples Energy agrees to provide the following:

- Proof of requisite licensure and insurance
- Warranties on equipment and installer labor
- Adherence to local building codes and permitting regulations
- Protection of Work, Persons and Property
- Independent contractor status
- Installation and Performance Standards
- No solicitation of work outside the Bid Proposal except as noted
- Pre-set labor rates, markups and materials pricing
- Documented recycling of replaced equipment that contains hazardous materials

5. ELIGIBLE EFFICIENCY MEASURES

For the purpose of this Policy and Procedures Manual, eligible efficiency measures are categorized as follows.

Tier 1 Measures installed by the program include but not limited to:

- Residential Pipe Wrap (Indoor/Outdoor)
- Auto Diverting Tub Spouts
- Faucet Aerators (Kitchen/Lavatory)
- Shower Flow Restriction Valve
- Shower Head
- Smart Thermostat
- Duct Testing and Sealing

Tier 2 Measures installed by the program include but not limited to:

- Efficient Gas Furnace
- Natural Gas Dryers
- Natural Gas Storage Water Heater
- Natural Gas Tankless Water Heater
- Natural Gas Fireplace Inserts
- Natural Gas Freestanding Oven
- Natural Gas Pool Heaters

Equipment Specifications

Installation: Comprehensive appliance and HVAC retrofits shall be installed using licensed contractors and installers in accordance with industry and CPUC standards. All measures shall be installed exactly as specified by Program staff.

Installation Warranty: Labor and workmanship shall be warranted for twenty-four (24) months by the installer, except in the following cases:

Required warranties for materials are listed in the Warranty Section of this manual.

6. INCENTIVE TABLES

The incentive structure was created by the Staples Energy team and it reflects two tiers of measures to be installed in homes. The first tier of measures are simple measures that will be installed either on the initial customer site visit or by a technician needed for follow up. These are no cost measures fully covered by the Program. The second tier of measures include larger appliances that will be replaced and installed by certified professionals. Tier 2 measures will have a customer cost, and this is reflected in the table below under Participant Cost.

TIER	Measure Description-Original Proposed
TIER1-Comm	1" Residential Pipe wrap, Indoor - Medium Temp-High Usage, linear feet
TIER1-Comm	1" Residential Pipe wrap, Outdoor - Medium Temp-High Usage, linear feet
TIER1-Comm	Faucet aerator: 0.5 GPM, Gas water heater, Lavatory - Residential application, CZ13
TIER1-Comm	Faucet aerator: 1.5 GPM, Gas water heater, Kitchen - Residential application. Direct Install Only per 2013 disposition.
TIER1-Comm	FCV: Res Faucets (Faucet Flow Control Valves 1.0 GPM, Lavatory Faucet)
TIER1-Comm	FCV: Res Faucets (Faucet Flow Control Valves 1.5 GPM, Kitchen Faucet)
TIER1-Res	1" Residential Pipe wrap, Indoor - Medium Temp-High Usage, linear feet
TIER1-Res	1" Residential Pipe wrap, Outdoor - Medium Temp-High Usage, linear feet
TIER1-Res	Auto-Diverting Tub Spout with Thermostatic Shut-Off Showerhead, RES, Gas, 1.5 gpm, CZ13
TIER1-Res	Faucet aerator: 0.5 GPM, Gas water heater, Lavatory - Residential application, CZ13
TIER1-Res	Faucet aerator: 1.5 GPM, Gas water heater, Lavatory - Residential application, CZ14
TIER1-Res	FCV: Res Faucets (Faucet Flow Control Valves 1.0 GPM, Lavatory Faucet)
TIER1-Res	FCV: Res Faucets (Faucet Flow Control Valves 1.5 GPM, Kitchen Faucet)
TIER1-Res	Shower Flow Restriction Valve: Gas water heater - Residential, CZ13

TIER1-Res	Shower Head and Flow Restriction Valve: 1.6 GPM, Gas water heater - Residential, CZ13
TIER1-Res	Shower Head: 1.5 GPM, Gas water heater - Residential application - Handheld, CZ13
TIER1-Res	Shower Head: 1.5 GPM, Gas water heater - Residential application, Fixed, CZ13
TIER1-Res	Residential Smart Thermostat, CZ13
TIER1-Res	Residential: Duct Sealing (Total Leakage Reduced from High (40/35%) to Low (15/12%), CZ13, Assuming a 3.5 ton unit (central AC with a gas furnace)
TIER2-Comm	Efficient Residential Gas Furnace - AFUE 95, SCG - IOU, Assuming a 60,000 BTU unit assuming central AC exists
TIER2-Res	Efficient Residential Gas Furnace - AFUE 95, CZ 13, Assuming a 55,000 BTU unit assuming central AC exists
TIER2-Res	ENERGY STAR Certified Natural Gas Dryers
TIER2-Res	ENERGY STAR Certified Natural Gas Storage Water Heaters
TIER2-Res	ENERGY STAR Certified Natural Gas Tankless Water Heaters - (UEF) of .81 - .86
TIER2-Res	ENERGY STAR Certified Natural Gas Tankless Water Heaters - (UEF) of .87 - .92
TIER2-Res	ENERGY STAR Certified Natural Gas Tankless Water Heaters - (UEF) of .93- .94
TIER2-Res	ENERGY STAR Certified Natural Gas Tankless Water Heaters - (UEF) of .95 or higher
TIER2-Res	Natural Gas Fireplace Inserts - Tier I (70-74.9 FE)
TIER2-Res	Natural Gas Fireplace Inserts - Tier II (75% FE or greater)
TIER2-Res	Natural Gas Freestanding Oven
TIER2-Res	Natural Gas Pool Heaters – Thermal Efficiency (84% - 89% TE)
TIER2-Res	Natural Gas Pool Heaters – Thermal Efficiency (90% TE or above)

Workpaper Information

Approved workpapers are used for the measures associated with this program.

Software Tools (Attach Snapshot Factsheet from website)

Energy Snapshot: Staples will use proprietary auditing software to conduct assessments in home and enter the data points collected for required measures. Energy Assessments will be generated from the Snapshot tool and sent directly to the customer for review. This tool will export the data to our secure and internal FileMaker database.

7. INSTALLATION STANDARDS

This document contains the installation standards for the Program. The detailed equipment specifications featured in the Staples Energy [Equipment/Price List](#) provide measure-by-measure retrofit recommendations for the most common efficient retrofit scenarios that qualify for this Program. Installations must meet the standards listed below. Equipment must be installed in a manner that yields energy savings and provides long-term occupant comfort and safety.

In addition to being technically proficient in the installation of equipment, Staples Energy installers are expected to provide high quality and comprehensive customer service that meets and exceeds both Staples Energy and SoCalGas standards.

Interpretation of Work Orders

The Staples Energy installer is responsible, before initiating work, with verifying the existing (pre-retrofit) site conditions as outlined in the Work Order. The installer is responsible for reading and fully understanding the Contractor Work Order to verify what type of equipment shall be installed. Any question regarding the assessment performed by the Energy Specialist, the Work Order, or the equipment to be installed shall be addressed with the Energy Specialist before Work is initiated. If an installer performs Work without reading and fully understanding the Work Order and incurs additional costs as a result, such costs are solely the responsibility of Staples Energy and shall not be passed on to the Customer or SoCalGas.

Customer Service

Good customer service is the first step in realizing high customer satisfaction. The following customer service strategies are required to foster communication and ensure that the efficiency measures are installed in a timely fashion with minimal disruption to the Customer's place of business.

Scheduling: Staples Energy office staff is responsible for scheduling the installation with the Customer. In some circumstances, the work schedule may need to be adjusted to perform installation after normal business hours in the event the customer is not available during normal business hours. The installation shall be scheduled within one week of generating the Work Order for the project, with Customer availability accommodated as necessary.

Normal business hours are from 8:00 a.m. to 5:00 p.m., Monday through Friday, excluding holidays. There shall be no extra charges for installations performed during normal business hours or after normal business hours for Staples Energy convenience.

Installations that are performed after normal business hours at the Customer's convenience may be subject to an extra charge. Installations that are to be performed on weekends or holidays may be charged extra. Staples Energy shall verify with the Customer the working hours for the installation and any extra charges prior to installation. Any extra charges for working after normal business hours or on weekends or holidays apply to the Customer Agreement only. These charges will be clearly itemized on the invoice to the customer for transparency.

Response Time

Staples Energy will respond to Customer inquiries within 24 business day hours and will provide answers to logical questions as quickly as possible during or as a follow-up to the initial inquiry. If the customer inquiry is not feasible on short notice, the parties shall agree upon a reasonable time when a full response is to be expected. If a response is available on short notice, it shall be delivered by a mutually agreed upon method (telephone, email, fax or other) within 24 hours.

Staples Energy will complete the installation in a timely manner. This means that an installation shall not be done piecemeal. Once an installation has begun, Staples Energy installers are required to be on site every day during normal business hours (or at the time pre-arranged with the Customer) for the full work period until the installation is completed. To facilitate this, Staples Energy will have all required materials in stock prior to beginning installation, barring an unusual circumstance that would require a trip to a local hardware store for additional material. Installers shall provide the Customer with an estimate of the date the installation will be completed and will inform both the Staples Energy supervisor and the Customer if the installation appears to be taking longer than the original estimate. Unless approved by the Program Manager, all installations shall be completed within 5 normal business days, unless the problem interrupts the Customer's normal business operations or represents a health and safety threat, in which case the correction shall be made immediately.

Attire

The attire and general appearance of the installation staff shall be neat and clean. Installation staff must wear the shirt with embroidered logo provided by Staples Energy and attached name badge that identifies the installers as a Staples Energy employee. At the beginning of the work period, the installation staff attire shall be clean and in good repair. Attire shall also be appropriate to perform the tasks safely. Hair must be neat and worn in such a way that it does not interfere with the installer's vision or work performance. Jewelry must not be dangling outside the clothing.

Installation Staff Behavior

Staples Energy requires all installation staff to treat the Customer, co-workers and all others on the Customer's site with the utmost courtesy. Installation staff shall behave respectfully to other installation staff, Customers and their clients. The installation staff shall not behave in any manner that is offensive to the Customer or their clients. This includes, but is not limited to, the use of loud or foul language, smoking, suggestive or provocative words or gestures. Installation staff shall also refrain from playing recorded music (i.e., radio, tape or CD).

Staples Energy is committed to a drug and alcohol-free workplace. Installation staff shall not be under the influence of alcohol or illegal drugs during work hours and will face disciplinary action or job termination if such an instance occurs and can be verified.

Staples Energy may remove from the Work site, any employee who Staples Energy has reasonable grounds to believe has engaged in alcohol abuse or illegal drug activity that any way impairs the employee's ability to maintain safe working conditions, to protect the health and well-being of Staples Energy employees, customers and the general public and to meet SoCalGas standards.

Existing Conditions

Staples Energy installers will verify existing conditions at the installation site before Work begins. Prior to commencement of work the installers shall note and report to the Energy Specialist all defective fixtures, including electrical and safety defects, code violations and aesthetic defects (e.g., missing or damaged parts). If the Energy Specialist or Installer discovers a pre-existing code violation(s) prior to or in the course of performing the Work that would affect the Work specified in the Work Order, the ES or installer shall stop work and immediately notify the Customer and Staples Energy supervisor of said violation(s). Work on the affected system shall not proceed until the applicable code violation is corrected. If the code violation presents an immediate danger, the installation staff shall evacuate the premises leaving the equipment being retrofit in a safe condition.

JSA – Staples employee conducts JSA on site at arrival to determine whether an installation is viable given the current setting. If a customer is to go through with Tier 1 or Tier 2 measures, Staples will not install unless the location in the home has been cleared by the requirements of the JSA. This is a responsibility of the customer to ensure that there is a safe working environment for Staples employees to successfully conduct the work. (SEE DOCUMENT ATTACHED)

Sale of Non-Program Measures

During the course of the Manufactured Home Program work, Staples Energy shall not solicit work from the Customer that is not included in the Work Order except as noted. Before performing any subsequent work outside the scope of the Work Order, Staples Energy must distinguish to SoCalGas and the Customer that Staples Energy is offering services outside of the Manufactured Home program.

Comprehensiveness of Services

Energy Specialists and Installers are not expected to be experts in all efficiency programs available to Customers in the SoCalGas service territory. In the event that the Customer needs additional energy efficiency information or service outside the ES' or Installers' scope of service, the Customer shall be referred to the Government Partnership program or the SoCalGas Account Service Representative for follow-up.

Clean Up

Equipment and materials shall be carefully handled, properly stored and adequately protected to prevent damage before and during installation, in accordance with the manufacturers' recommendations. Staples Energy shall provide storage for any materials and may utilize allowable space designated by the Customer for that purpose.

The installer shall cover merchandise, food and dry goods, furniture, equipment, etc. to protect against dust and dirt during installation, and shall protect light fixtures and surrounding areas against smudges and dirt. Staples Energy shall be solely responsible for Customer damage or cleaning costs that result from installation work.

Installers shall protect people and property from damage and debris at all times during and after the installation process. Interior work areas shall be cleaned and restored to their initial condition at the end of each work period. Installers shall remove fingerprints from all surfaces touched during the install, sweep or vacuum all debris from the project site and clean all lenses, reflectors and ballast covers with cleanser. Installers shall keep the work area clean; keep access to all areas of each building clear; move and replace furniture, files, machines and equipment as required during installation; minimize

interference to occupants; and interrupt building services only after attaining the Customer's approval. Staples Energy, at its own expense, shall repair damage to buildings and equipment caused by Work done under this Program.

RETROFIT MEASURES

These installation standards do not include all details required for the completion of the Work but do specify guidelines that are required to be followed for this Program. Staples Energy shall be responsible for the cost of all items required for a complete and operating system. Also, Staples Energy shall provide all labor, materials, tools, equipment, and services required.

Materials

Staples Energy is responsible for procuring and installing equipment to provide functional systems as outlined in these standards and the equipment specifications. All products shall be new, free from defects and meet all the requirements in the equipment specifications.

Warranty

Staples Energy pledges to its customers that all material, workmanship, and/or building improvements provided will be free of defects, will be of a specified quality, and will perform properly for a period of two years from the day of commencement of use, substantial completion of the project, or a date of notice of completion of the project, whichever is the first to occur.

Staples Energy will assign and deliver to owner all guarantees, warranties, and quality instructions of all subcontractors, equipment manufacturers, and material suppliers that are applicable to the project. Within 10 days of the first knowledge of any defect or failure to operate properly, Staples Energy is to be notified, in writing, of by owner or his/her agents, and shall be given first opportunity to promptly repair, replace, and/or correct item found to be defective, or that fails to function properly, at no cost to the owner within a reasonable period of time. This warranty does not apply to any construction work that has been subjected to an accident, misuse and abuse, nor to any construction work that has been modified, altered, defaced, and/or repairs made or attempted by others.

What is not covered in this warranty. Under no circumstances shall Staples Energy be liable by virtue of this warranty or otherwise for damage to any person or property whatsoever for any special, indirect, secondary or consequential damage of any nature however arising out of the use or inability to use because of the construction defect. Staples Energy is not liable for repair conditions caused by chemical or sedimentary build up, misuse or abuse, failure to clean or maintain as specified by the equipment manufacturer, missing parts, structural changes, fire, freezing, electrical failure or surge, water damage, lightning, mud, earthquake, soil movement, soil sediment, storms, accidents, pest damage, or acts of God. Staples Energy will not perform normal or routine maintenance, and they will not pay for failures that result from the Contract holder's failure to perform normal or routine maintenance.

Staples Energy will not repair or replace any covered systems or appliances if they are inoperable as a result of preexisting conditions. Staples Energy is not responsible for upgrade or additional costs or expenses that may be required to meet current building or zoning code requirements.

Electrical Permits, Codes, Certifications

Materials and installation procedures shall conform to all applicable building and electrical codes, standards and regulations and shall meet the specified warranty standards. Wiring shall comply with the prevailing National Electrical Code (NEC).

Staples Energy is responsible for obtaining and pay all fees for all required permits and licenses.

Abatement of existing code violations is not included as part of these standards. No work shall be performed on any fixture or equipment when there is a known or suspected code violation applicable to the work. If, in order to perform any of the work included in this Program, Staples Energy, its employees or agents discover relevant code violations, the Work shall not proceed until the installer has completed the steps outlined in the Existing Conditions (Code Violations) section of this manual. In situations where the customer is required to update their work environment to code, Staples will hold off on any installations until approved by SoCalGas Program Manager.

Safety

Staples Energy shall observe and comply with all applicable laws, ordinances, codes and regulations of governmental agencies, including federal state, municipal and local governing bodies having jurisdiction over any or all the Scope of Services, including all provisions of the Occupational Safety and Health Act of 1979 as amended, all California Occupational Safety and Health regulations, and all other applicable federal state, municipal and local safety regulations. All services performed by Staples Energy shall be in accordance with these laws, ordinances, codes and regulations. Staples Energy shall release, defend, indemnify and hold Harmless SoCalGas, its officers, agents, volunteers and employees from all the damage's liability, fines penalties and consequences from any noncompliance or violation of any laws, ordinances, codes or regulations. If a death, serious personal injury or substantial property damage occurs in connection with the Program, Staples Energy shall immediately notify SoCalGas by phone.

Injury

If any accident occurs in connection with the Program, the employee shall promptly submit a written report to the Staples Energy supervisor in the required form. If a release of hazardous materials or hazardous waste that cannot be controlled occurs in connection with the Program, Staples Energy shall immediately notify the appropriate Police Department and the Staples Energy supervisor.

Asbestos abatement is not included as part of these standards. No work shall be performed in any area where there is a known or suspected asbestos hazard. If, in order to perform any of the Work included in this Program, the Contractor or the Contractor's employees must work in an area where they may be exposed to asbestos, this Work shall not proceed, and Staples Energy shall inform SoCalGas.

Disposal, Recycling and Demolition (Sierra Recycling and Demolition Bakersfield)

Staples Energy is a firm believer in the Safety and Care of our environment, we strive to keep our landfills as clean as possible. We currently use Sierra Recycling and Demolition in Bakersfield California for our current programs to ensure any materials can be reused for their metal. We will utilize Sierra for Recycling all appliances for the SoCalGas MFH Project. All Thermostats that contain mercury in them will be handled and stored properly to be delivered to Johnstone Supply in Bakersfield. Johnstone is a material supply vendor we use that also is our designated mercury disposal location.

Final Acceptance

Upon project completion, the Staples Energy installation crew will collect Customer payment in the form of credit card or check (below \$250 only) and compile file with all project data and paperwork. Staples Energy will conduct an internal file review of 100% of all completed projects before submitting to gas company for invoice.



Correction

If, during the process of a post-installation survey there are found discrepancies from the Program Agreement, Installation Agreement, installation standards, equipment specifications or Work Order, Staples Energy shall bring the installation into compliance with 10 days.

8. PROGRAM PACKAGES AND CUSTOMER COSTS

Staples Energy is reimbursed from Public Goods Charge (PGC) funds collected from utility ratepayers under the auspices of the California Public Utilities Commission. These incentives subsidize part of the cost of a project to the Customer. The Customer pays Staples Energy for the remainder of project installation costs not covered by the incentive.

Staples Energy is reimbursed the incentivized cost of each project calculated by SoCalGas' preset incentive values per measure. The customer pays any product and/or installation costs not covered by the incentive.

9. QUALITY CONTROL AND INVOICING PROCESSES

Quality Control Process

Upon project completion, the Staples Energy installation crew will provide SoCalGas with all relevant project data and paperwork. Staples Energy will conduct a file review of 100% of all completed projects.

1. Within 30 days of Project Completion, Staples Energy will conduct a phone customer satisfaction survey and/or site inspection of 20% of all completed projects. All surveys will be recorded into Staples Energy Snapshot tool. A monthly excel report will be created to show the results and/or feedback.

In addition to this, Staples Energy will have a Foreman inspect a sample of sites installing both Tier 1 and Tier 2 measures every month to ensure quality is up to the standards outlined in this manual. This will be randomly selected for participating customers and Staples will strive for this to occur at a rate of 20% of installations with customer approval.

Third-Party Evaluation, Measurement and Verification Plan (EM&V)

Staples Energy shall coordinate with the Program's CPUC-approved EM&V subcontractor to ensure accuracy of energy savings estimates and further improve program quality.

Customer Complaint Resolution Procedure

Staples Energy maintains a toll-free Customer Service Telephone Number for issue and conflict resolution. Staples Energy agrees that, at a minimum, the toll-free number has four incoming lines and is staffed to support Spanish and English language communications during normal business hours Monday through Friday from 8 am until 5:30 pm. During non-business or when four lines are busy, calls roll over to a voice mail system. Office staff checks the voice mail system and return calls at least three

times daily. Response times are less than twenty-four (24) hours; calls are not returned on Sunday. Staples Energy provides, in the voice mail system, an outline of procedures for Customers to receive 24-hour emergency assistance seven (7) days a week.

Staples Energy will resolve all reasonably-based complaints from a SoCalGas Customer within five (5) business days after notification by the Customer or referral by SoCalGas' Program Manager or through the SoCalGas Database, whichever is earlier.

Staples Energy will decide on a reasonable course of action, communicate the action to the Customer and SoCalGas Program Manager for their agreement. If Staples Energy is unable to resolve a customer complaint within five (5) business days, Staples Energy will contact the SoCalGas Program Manager within 48 hours of determining that the dispute cannot be resolved within five (5) business days and will determine with SoCalGas' concurrence the appropriate steps required for dispute resolution.

Staples Energy will maintain a log of all Customer complaints and will report on all complaints in its Monthly Reports and maintain that log for at least three (3) years following the end of the contract term or receipt of final payment, whichever is later.

Invoice Process

Once all work is completed the project is submitted to Staples staff for reviewing and processing. The completed project is data entered into Energy Snapshot. These measures are exported and up-loaded into the bulk load system prior to the 15th of the following month.

10. MISCELLANEOUS TOPICS

Marketing Claims

All claims regarding estimated savings will be delivered in writing to the Customer through the Upgrade Summary and Customer Work Order Agreement as generated by the Staples Vault database. The Customer Work Order Agreement will clarify that the projected project costs and energy savings are estimates ONLY and that Staples Energy and SoCalGas do not guarantee that a specific level of energy or costs savings will result from the implementation of energy conservation measures or the use of projects funded under this program.

Customer Satisfaction Surveys

1. Staples Energy shall conduct customer satisfaction surveys throughout the Program period. The purpose of the survey is to solicit customer feedback with the goal of helping to evaluate and improve the Program. Survey results shall be reported to SoCalGas per contract specifications. All surveys will be recorded into Staples Vault Database. A monthly excel report will be created to show the results and/or feedback.

Disadvantaged Worker Plan

Staples Energy is proud to be a significant contributor to employing Disadvantaged Workers. Our California Corporate office, located in Kern County, qualifies as a DAC county. The majority of our staff working on this program will be coming from Kern county with few exceptions of management staff located in other counties and states.

This will be tracked and reported monthly to SoCalGas with a number and percentage of employees working on this program.

11. DEFINITIONS

Audit or Assessment – An objective and structured assessment of existing energy consuming systems within a Customer’s place of business, for the sole purpose of identifying no-cost/low-cost facility or Customer operational improvements and Measure investments which can save energy and/or reduce energy demand.

Audit Report – Written report provided to the Customer to inform Customer of Program audit findings for Customer facilities, including recommended measures and energy and estimated cost savings.

Average Demand (“kW”) – The average kW consumed during a twelve (12)-month period for a given Customer service agreement which has been, and is, billed on a demand meter.

Change Order -- A revision or modification to the Customer’s Enrollment Package resulting from a discrepancy between the Energy Specialist’s assessment and the Installer’s further assessment of potential EEMs prior to actual installation.

Cost-Effectiveness – The indicator of the relative performance or economic attractiveness of any energy efficient investment or practice when compared to the costs of energy produced and delivered in the absence of such an investment.

CPUC or Commission – The California Public Utilities Commission

Customer – For purposes of this program, a business receiving gas distribution service from SoCalGas and paying the Public Goods Charge

Customer Agreement– A signed agreement between the Staples and the Customer that describes the Measures to be installed at the Customer premise(s), cost to the customer, estimated energy savings

Demand Response (“DR”) – Activities or equipment that induce(s) consumers to use energy at different (lower-cost) times of day or to interrupt energy use for certain equipment temporarily, usually in direct response to a price signal.

Direct Install – Programs that provide for the direct installation of energy efficient hardware to utility Customers with no cost or partial Customer co-payment.

Double-Dipping – Occurs when a Customer takes advantage of multiple California Public Goods Charge funded or non-allowable financial Incentives offered by multiple programs for undertaking only one activity

Dual Test – The requirement that an Energy Efficiency activity pass both the TRC and the PAC cost effectiveness tests.

Emerging Technologies – New energy efficiency technologies, systems, or practices that have significant energy-savings potential but have not yet achieved sufficient market share (for a variety of reasons) to be considered self-sustaining or commercially viable. Emerging technologies include early prototypes of hardware, software, design tools or energy services that, if implemented, will result in energy savings.

Energy Efficiency – Activities or programs that stimulate Customers to reduce Customer energy use by making investments in more efficient equipment or controls that reduce energy use while maintaining a comparable level of service as reasonably perceived by the Customer.

Energy Efficiency Measure or EEM – An energy-using appliance, equipment, control system, practice (other than practices that rely solely on behavioral changes, such as turning off lights), or design improvement whose installation or implementation results in reduced energy use (purchased from the distribution utility) while maintaining a comparable or higher level of energy service as perceived by the Customer. In all cases, Energy Efficiency Measures decrease the amount of energy used to provide a specific service or to accomplish a specific amount of work (e.g., kWh per cubic foot of a refrigerator held at a specific temperature, therms per gallon of hot water at a specific temperature, etc.).

Energy Specialist – Staples Energy staff that enroll Customers, perform facility audit and prepare Enrollment Package/Customer Agreement.

HVAC – Heating, Ventilation, and Air Conditioning Systems

Incentive – Energy savings and payback provided by the Program Package at no cost or low cost to the Customer

Installed and Verified – The energy and demand savings resulting from installed equipment, verified according to the SoCalGas-approved Quality Assurance and Quality Control Plan and approved in writing by SoCalGas.

Installer – Trained Staples Energy staff that install measures per the Customer Agreement prepared by the Energy Specialist, make customer-approved changes if necessary, obtain signed Project Completion Forms and process Customer payment.

IOU – An investor-owned utility, including, but not limited to, Southern California Gas Company (“SoCalGas”). For the purposes of these Specific Conditions, and unless indicated otherwise, all references to an IOU shall mean SoCalGas.

kW – One kilowatt of electricity.

kWh – One kilowatt-hour of electricity.

Load Management – Programs which reduce or shift Electric Peak demand away from periods of high-cost electricity to non-peak or lower-cost time periods, with a neutral effect on or negligible increase in electric use.

Lost Opportunity – The occurrence when a Customer does not install an Energy Efficiency Measure that is cost-effective at the time, but whose installation is unlikely to be cost-effective if the Customer attempts to install the same Measure later.

Maximum Demand (kW) – The highest demand (measured in kW), for a given Customer service agreement, over a 12-month period for those Customers who have been, and are, billed on a demand meter.

Net Peak kW – Peak kW savings is deemed to be the peak kW savings from the Database for Energy Efficiency Resource (DEER) for measures where data are available in DEER. For measures that are not in DEER, the peak kW is determined by using industry-accepted calculation methodologies approved by SoCalGas, based on DEER definition of peak kW. The DEER definition of peak kW is the average grid level impact for the measure from 2 p.m. to 5 p.m. during the three consecutive weekday periods containing the weekday with the hottest temperature of the year. DEER identifies these three contiguous peak kW days for each of the 16 California climate zones, based on the weather data sets developed for the California Title 24 Building Energy Efficiency Standards. DEER also defines a secondary peak demand period for educational facilities and other buildings that tend to operate at greatly reduced use during the peak demand period defined above. For this purpose, DEER uses the next highest peak during a period in which the facility is operated in full-use mode. The net Peak kW value is the Peak kW as defined above adjusted for the net-to- gross ratio.

Payback – Length of time required for energy costs saved by the installation to equal the customer cost of the installation as provided by the customer.

SoCalGas Program Manager – The SoCalGas-authorized representative responsible for administering this Contract; monitoring Contract activities, Deliverables and expenses for SoCalGas; and authorizing invoices for payment.

Program Launch – The time period after which the Program is accepting Customer applications.

Program Package – As defined by Staples, the group of EEMs provided to the Small Business Customer according to business/facility type in coordination with the Government Partner in targeted SoCalGas territory.

Program Participation Agreement or PPA – The document which Staples must use to secure a Customer's Commitment to participate in the Program and Commitment to install the Program Measures; this includes the Incentive Application, as applicable, and as set forth in Exhibit G (Incentive Application Requirements). The PPA shall contain (i) the valid signature by the Customer or an authorized representative of the Customer and; (ii) the counter-signature on the PPA by Staples or an authorized representative of the Staples, signifying Staples' acceptance of the Customer application to participate in the Program.

Project – The installation of Measures at a Customer facility.

Rebate Program – A Program that encourages Customers to undertake a specific act, typically installing energy efficiency equipment, by providing a monetary amount (rebate) following the completion and verification of installation.

Records – Documents stating or supporting results achieved or providing evidence of activities performed. Records may vary depending on scope of work and Program purpose but include any

documents that demonstrate conformance to Program requirements including, but not be limited to, completed and signed Customer applications, trending data, energy savings calculations, training rosters and subject matters, Quality Assurance and Quality Control inspection data, proof of Incentives paid to Customers, project cost data, final approved program documents (Quality Assurance and Quality Control Plan, P&P Manuals, Installations Standards Manual, monthly Accomplishment Reports, Program Marketing Materials), Customer forms indicating that Customer has not received other Incentives for the Measure(s) (described in Section 2.4 Prevention of Double Dipping), along with evidence of SoCalGas approval thereof, Audits, analysis, reports, forms, e-mails, timesheets, correspondence, non-disclosure agreements signed by project and program personnel who may have access to confidential Customer information and any other documents demonstrating compliance to the conditions of this Contract.

Retrofit – 1) Construction that involves complete removal, redesign and replacement of the energy consuming systems of a building or process; 2) projects that require design and selection of new systems based upon the needs of new or modified space function(s); and 3) major tenant improvements that add new load.

Vault – Staples Energy' Energy Watch Database

Service Territory – The geographical area served by SoCalGas.

Staples – The term “Staples” shall have the same meaning as Consultant or Contractor, i.e., the party or parties entering into this Contract with SoCalGas for the Work.

Task or Tasks – Any and all items of work to be performed pursuant to the Scope of Work and in accordance with the terms and conditions of this Contract.

Total Program Net kW Savings – The User-Entered kW savings associated with Measures installed by Staples and approved by SoCalGas. For the purposes of this definition, savings are determined ex ante and will not be modified ex post. Net savings are those resulting from the Final, Approved Avoided Cost Calculator Workbook attached as Exhibit B.

Total Program Net kWh Savings – The annual net kWh savings associated with Measures installed by Staples and approved in writing by SoCalGas. For the purposes of this definition, savings are determined ex ante and will not be modified ex post. Net savings are those resulting from the Final, Approved Avoided Cost Calculator Workbook attached as Exhibit B.

Total Program Gross kW Savings – The annual gross kW savings associated with Measures installed by Staples and approved by SoCalGas. For the purposes of this definition, savings are determined ex ante and will not be modified ex post.

Total Program Gross kWh Savings – The annual gross kWh savings associated with Measures installed by Staples and approved in writing by SoCalGas. For the purposes of this definition, savings are determined ex ante and will not be modified ex post.

Total Program Gross Therm Savings – The annual gross Therm savings associated with Measures installed by Staples and approved by SoCalGas. For the purposes of this definition, savings are determined ex ante and will not be modified ex post.

Total Program Gross Therm Savings – The annual gross Therm savings associated with Measures installed by Staples and approved in writing by SoCalGas. For the purposes of this definition, savings are determined ex ante and will not be modified ex post.

12. APPENDIX A: Appliance Data Collection

Furnace Information and Data Points:

- Furnace Type (Forced Air (up flow/down flow), Wall Heater etc.).
- Furnace Make, Model and Serial Number
- Fuel Type
- BTU Rating
- Number of Burners
- Gas line size and it's condition
- Is home pre-plumbed for Natural Gas
- Unit's measurements (height/length/width)
- Duct Condition
- Properly grounded outlet
- Replace or Conversion options
- Breaker Size and Type
- Number of register and supply returns
- Vent Type, size and its condition
- Addition parts needed for Replacement or Conversion
- Product Recommendations for Replacement or Conversion Dropdown List
- Note section
- Photos

Water Heater Information and Data Points:

- AWH Make, Model and Serial Number
- Water Heater Type (Storage/Tankless).
- Fuel Type
- BTU Rating
- Gallon Size
- Gas line size and it's condition
- Is home pre-plumbed for Natural Gas
- Unit's measurements (height/width)
- Tank Location
- Replace or Conversion options
- Addition parts needed for Replacement or Conversion
- Product Recommendations for Replacement or Conversion Dropdown List
- Can PTRV be located outside
- Is a watts 210 valve needed
- Vent Type size and its condition
- Shed or stand required

- Note section
- Photos

Free Standing Range Information and Data Points:

- Range Color
- Range Make, Model and Serial Number
- Fuel Type
- BTU Rating
- Number of Burners
- Gas line size and it's condition
- Is home pre-plumbed for Natural Gas
- Unit's measurements (height/length/width)
- Properly grounded outlet
- Replace or Conversion options
- Breaker Size and Type
- Does the unit have a Broiler?
- Addition parts needed for Replacement or Conversion
- Product Recommendations for Replacement or Conversion Dropdown List
- Note section
- Photos

Dryer Information and Data Points:

- Dryer Color
- Dryer Make, Model and Serial Number
- Fuel Type
- BTU Rating
- Gas line size and it's condition
- Is home pre-plumbed for Natural Gas
- Unit's measurements (height/length/width)
- Properly grounded outlet
- Replace or Conversion options
- Breaker Size and Type
- Does the unit proper exhaust to the outside
- Addition parts needed for Replacement or Conversion
- Product Recommendations for Replacement or Conversion Dropdown List
- Note section
- Photos

Duct Testing and Sealing Process Information:

- Utilize Duct Blaster to pressurize system and detect any anomalies in air flow
- If pressure is constant at multiple points no leak should be present

- If pressure is not constant, identify low pressure section for leakage in ducting
- Once leaks have been identified, seal with duct mastic, foil tape, or aerosol sealant
- Program will not allow for cloth duct tape to seal duct leakage
- Photos

13. APPENDIX B: Supporting Documents



StaplesEnergyGuaran
teeofWork.pdf



Staples Snapshot
Flyer.pdf



Staples JSA.pdf



SoCalGas
Manufactured Homes