



SNEW 2020-23 Program Implementation Plan [DRAFT]

PACIFIC GAS AND ELECTRIC COMPANY

2020-2023 ENERGY EFFICIENCY PORTFOLIO

PROGRAM IMPLEMENTATION PLAN

LOCAL GOVERNMENT PARTNERSHIPS

SIERRA NEVADA

JULY 2020

Prepared For:

Pacific Gas & Electric Company

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Program Overview

The Sierra Business Council’s Sierra Nevada Energy Watch (SNEW) Local Government Partnership is a three-year, \$1.8 million non-resource program designed to further PG&E/CPUC energy efficiency goals, especially in rural, Hard-to-Reach (HTR) and Disadvantaged (DAC) communities of the Sierra Nevada. The program will use energy efficiency project development activities, planning and policy work, analysis, and outreach/education efforts designed to motivate public sector leaders and unserved Small- and Medium-Sized Businesses (SMB) to increase both capacity and on-the-ground energy efficiency action in a 14-county area covering roughly 20% of PG&E’s total territory.

The SNEW LGP program provides tools, best practice examples, and hands-on guidance to make identifying and acting on energy savings opportunities easier, thereby building local governments’ capacity to pursue more aggressive energy savings over time.

Program Budget and Savings

Table 1: Program Budget and Savings Summary

1. Program Name	Sierra Nevada
2. Program ID	N/A
3. Program Budget Table - PY 1	\$ 60,836 Admin \$ 30,418 Marketing <u>\$517,109</u> Direct Implementation \$608,363 Total
3. Program Budget Table - PY 2	\$ 61,041 Admin \$ 30,520 Marketing <u>\$518,847</u> Direct Implementation \$610,408 Total
3. Program Budget Table - PY 3	\$ 60,819 Admin \$ 30,409 Marketing <u>\$516,958</u> Direct Implementation \$608,186 Total
4. Gross Impacts Table	N/A

5. Cost-Effectiveness (TRC)	0
6. Cost-Effectiveness (PAC)	0
7. Type of Program Implementer	Local Government Partnership
8. Market Sectors	Public, HTR/DAC S/M/B
9. Program Type	Non-Resource
10. Market Channels	Downstream
11. Program Administrator	Pacific Gas & Electric (PG&E)

Implementation Plan Narrative

1. Program description

Sierra Business Council (SBC) is a regional organization that works to increase community vitality, economic prosperity, environmental quality, and social fairness in the Sierra Nevada. We are serving as the Local Government Partner for the Sierra Nevada Energy Watch (SNEW) program. As a regional organization, SBC strives to develop and secure participation in innovative policy opportunities that link economic development, energy security through renewables, energy efficiency, sustainability, social fairness, and innovation. SBC also has a long history of regional collaboration and will coordinate peer-to-peer networking and sharing of best practices between business and government leaders in the region. Additionally, SBC has a record of success with developing and updating planning policies in the Sierra Nevada region, and works with local county and city governments on general plan updates, greenhouse gas emission inventories, building benchmarking, and energy and climate action plans to integrate energy efficiency, land use, renewable energy, and waste reduction goals.

Program Purpose: The 2020-23 SNEW program is designed to further PG&E/CPUC energy efficiency goals through energy efficiency project development activities, planning and policy work, analysis, and outreach/education efforts to increase both public sector capacity and on-the-ground energy efficiency action, especially in rural, Hard-to-Reach (HTR), and Disadvantaged (DAC) communities of the Sierra Nevada.

Program Objectives: The SNEW program provides tools, best practice examples, and hands-on guidance to make identifying and acting on energy savings opportunities easier, thereby building local governments' capacity to pursue more aggressive energy savings over time. Key objectives include:

1. **project identification and implementation to speed navigation of the design/approval process** and secure energy savings through pipeline development and lead generation; project management services to assist jurisdiction staff; relationship-building with TradePros, ESCOs, and other implementers; coordination with regional CCA(s) and/or future RENs; and project identification in HTR jurisdictions, DAC communities, and unserved SMBs;
2. **planning and policy development as a driver to project implementation** through industry knowledge, targeted outreach and recruitment, energy analysis and planning services, network-building, community engagement, and information dissemination; and
3. **increased supply of and access to financial capital** to make resource acquisition projects more economically viable through identification of PG&E and financing options, use of regionally specific loan funds, and technical assistance with financing applications.

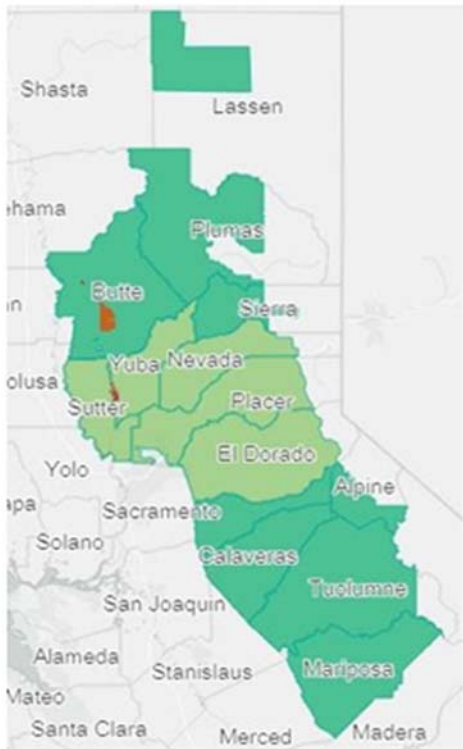
Table 2: 2020-23 SNEW Local Government Partnership Program Elements

Program Desired Outcomes	SNEW Services
Facilitate projects	<ul style="list-style-type: none"> ● Project pipeline development ● On-site services, e.g. preliminary energy audits, technical assistance, data support ● Network and partnership expansion ● Benchmarking/GHG inventories/EAPs to identify project opportunities ● Supply/access to funding
Increase awareness	<ul style="list-style-type: none"> ● Education campaign/interactive web portal ● Network and partnership expansion ● Trainings for public sector staff ● Support of community working groups
Facilitate opportunities for DAC/HTR customers	<ul style="list-style-type: none"> ● Project pipeline development in HTR/DAC communities ● On-site services targeted to HTR/DAC public sector and S/M/B ● Network and partnership expansion in HTR/DAC communities ● Benchmarking/GHG inventories/EAPs in targeted HTR/DAC communities ● Supply/access to funding targeted to HTR/DAC jurisdictions
Improve EE knowledge	<ul style="list-style-type: none"> ● Education campaign/interactive web portal ● Messaging and marketing campaign ● On-site services, technical assistance, and project management support to local governments ● Network and partnership expansion ● Trainings for public sector staff ● Support of community working groups

Advance EE community-wide	<ul style="list-style-type: none"> • Education campaign/interactive web portal • Messaging and marketing campaign • Project pipeline development, focused on implementing existing EAP/CAPs • Network and partnership expansion • Support of community working groups to create a community call-to-action • Supply/access to funding
Support GHG inventories	<ul style="list-style-type: none"> • Benchmarking, GHG inventories/re-inventories, EAPs • Technical assistance and project management support to help decision-makers “get to yes” • Trainings for public sector staff
Advance EE in public sector policies	<ul style="list-style-type: none"> • Policy recommendations for inclusion in EAPs • Support of community working groups to create a community call-to-action
Create and adopt standards for municipal facilities	<ul style="list-style-type: none"> • Standards recommendations for inclusion in EAPs • Trainings for public sector staff • Support of community working groups to create a community call-to-action

2. Program Delivery & Customer Services

The SNEW program serves 14 counties (in green), representing more than 20% of PG&E’s total territory, as well as the cities, K-12 schools, and special districts within those counties.



Geography/HTR/DAC: Nine of the 14 counties (in darker green) meet the Hard to Reach geographic definition. The region also contains more than 27,000 residents living in top 25% DAC communities identified by CalEnviroScreen (in red on the map). Many SMBs in this region also meet HTR criteria. These and other challenges increase the cost of communicating, building capacity, sharing information, and securing EE engagement.

The SNEW program’s HTR/DAC focus is guided by three principles: 1.) supplement local government staff capacity (especially important as local governments recover from COVID-19 revenue and staff losses) to make it easier to identify and develop projects in a timely manner; 2.) increase outreach efficiency to offset distance/time/cost of working in rural HTR areas; and 3.) maximize each project’s energy savings to increase overall savings and help “underwrite” small but locally beneficial projects.

Services: SNEW's objectives help to address the challenges of working in rural, HTR, and/or DAC areas by connecting interested entities with action options and pathways through the following services to be performed by staff:

- *Develop Education Campaign and Web Portal* with messaging tailored to local concerns (e.g. wildfire preparedness, resiliency to PSPS events), prioritized outreach, and improved information dissemination.
- *Develop Pipeline* based on in-person outreach (as allowed based on COVID-19 recovery requirements) to facilitate projects and support plan implementation. SNEW identifies HTR/DAC SMBs in unserved areas and provides technical assistance and training programs to magnify reach in rural areas.
- *Provide On-Site Services*, including preliminary energy audits, technical assistance, and data support to enroll agencies and identify next steps. SNEW also works with 3Ps to coordinate geographically bundled resource acquisition strategies to offset potential lower claimable savings.
- *Focus on Local Government Project Implementation and Management* to develop supporting materials, such as staff reports and presentations, for decision-makers. Also, by serving as first point of contact with public sector customers through SBC's regular suite of local government services, SNEW reduces implementers' lead generation costs, thereby increasing overall program cost-effectiveness.
- *Establish and Maintain Network and Partnerships* with 3P implementers, stakeholders, and local governments to provide effective engagement, information-sharing, technical tools, pooled regional resources, and leveraged energy reduction solutions to increase cost-effectiveness.
- *Conduct Benchmarking, GHG Inventory/Re-Inventory, and Energy Action Plans* as tools to identify EE projects and other energy-saving opportunities. Plans identify policy gaps, collect and analyze data, and produce energy use forecasts to address stranded potential savings. SNEW uses this information to prioritize energy reduction goals and outline annual project implementation schedules.
- *Facilitate Increased Engagement and Education* by hosting/promoting EE trainings for public sector staff, providing support for EAP implementation through community working groups, and creating a community call to action.
- *Increase Supply of and Access to Funding Opportunities* by consolidating financing information in the SBC Energy Resource Web Tool and offering Utility Financing Option assistance to identify stacked financing options (e.g. OBF, Pay as You Save, Self-Generation Incentive Program, Energy Conservation Assistance Act low-interest loans, etc.). SBC is also working to develop a regionally specific lending program to leverage private funding in support of local government EE resource acquisition.

Delivery Channels and SNEW's Role:

- Customer/Implementer liaison

Customer works with implementer/contractor to purchase product with incentives. SNEW acts as liaison to help connect customers to appropriate implementer(s)

- Key Market Channels
 - DI 3P Implementers (for expanded services, contractor bids)



- Trade Pros
- ESCOs

- Outreach tactics
 - Email and phone outreach
 - Direct mailing
 - Traditional media
 - Distributor relationships
 - Trainings
 - Presentations
 - Interactive web tool
 - Networking with local organizations

- Service delivery strategies:
 - Direct consultation with public sector jurisdictions to simplify the process of choosing the right measures, finding and hiring contractors to do the work, and learning about available incentives and financial assistance
 - Leveraging of SNEW relationships with local governments, community organizations, energy providers (e.g. CCAs, RENs), and the utility to coordinate and deliver regionally appropriate EE services to the region.

Deliverables: Direct, observable program outputs resulting from program services and activities include:

- Reports -- Inventories, EAPs, Benchmarking, Project Identification Plans
- On-site Preliminary Building Audits
- Project Management and Technical Assistance services rendered
- Web tool and associated educational/marketing materials developed
- Committed/Completed EE Projects
- Supporting materials (e.g. staff reports, presentations) developed for agency staff in support of local governments' public review and approvals process for projects
- Project leads transferred to Trade Pro, ESCO, and/or 3P implementers
- Technical Assistance and Training Programs delivered for public sector staff/community members
- Consultations with public sector and HTR customers regarding stacked financing opportunities.

Program Outcomes:

- Short-term
 1. Targeted outreach to jurisdictions that previously worked with SNEW to develop project pipeline for public sector, HTR, and DAC accounts, resulting in EE project identification and implementation.
 2. Confirmed relationships and established protocols for working with implementers.
 3. Assessment and development of feasible funding opportunities, including consultations to identify a range of financing options and assist with financing applications.

- Intermediate
 1. Expanded public sector and HTR SMB knowledge of EE practices as a result of facilitated trainings and individual contacts.
 2. Increased access to EE resources through energy resource web tool.
 3. Energy planning and energy use analyses and energy audits to previously unserved jurisdictions to justify project implementation to decision-makers.
 4. Increased financing resources through regional SBC-managed loan funds.

- Long-term
 1. Increased local government EE leadership resulting in reduced energy usage within the SNEW territory. Increased community knowledge and benefits through project identification and implementation paired with planning and ongoing EAP working group coordination.
 2. Meaningful contribution by rural, HTR, and DAC local governments to statewide energy and emissions goals.
 3. Widespread local government EE expertise.

3. Program Design & Best Practices

The SNEW team uses a dual pathway approach to identifying and enrolling customers to achieve energy savings and co-benefits. For agencies that have completed energy action or climate plans but need help implementing those plans, SNEW offers project identification, design, and installation support through the Project Pathway. For jurisdictions with outdated plans or those that have not previously outlined an energy reduction strategy, SNEW works with agency staff through the Planning Pathway to initiate leads that result in energy savings. SNEW also partners with HTR and DAC local governments to identify and support underserved SMB customers in their communities.

Marketing Strategies (with all in-person contact contingent upon lifting of COVID-19 restrictions, and no request for additional PG&E support services):

- Local Governments: work with planning staff, special district decision makers, and other public agency staff:
 - Inbound: content workshop and webinar series to introduce and further educate target audiences on EE project identification, EE building codes, and other relevant policy areas and create a lead generation pipeline for further outreach.
 - Outbound: update inventory of eligible agencies in the service territory, identify current stage of energy planning and implementation for each, and target marketing communications and educational materials accordingly.
 - Communications: in-person conversations with key planning staff and decision makers, email outreach, phone calls, direct mail, leave-behind materials, public presentations.

- Traditional media: including printed materials and EE toolkits for dissemination to community hubs, especially for communities lacking high-speed internet service.

- Energy Resources Web Tool: online tool for users to self-identify EE needs, level of engagement or interest, and budget constraints to get a custom list of eligible programs, incentives, and financing options, including existing PG&E programs, state and federal programs, as well as local government efforts and innovative financing options, such as local micro-lending and revolving loan funds.

Since more than two-thirds of the territory is considered HTR based on geographic criteria, more than 27,000 people live in DAC communities, and almost half of the area is classified as low-income per AB 1550, all of our proposed activities are geared toward both HTR/DAC and non-HTR/DAC jurisdictions. These factors, along with elevated and extreme fire risk, have been mapped out to help prioritize initial outreach efforts in areas of overlap.

Best Practices: The SNEW program sought input from public sector customers on key resource acquisition issues and obstacles. Through surveys and other outreach, customers identified: insufficient jurisdictional staff capacity, inadequate financial resources to undertake projects that often have long payback terms, lack of concise information and data to support decision-making by local government leaders, and preoccupation with wildfire risk and power safety shutoffs as key challenges. Each of these challenges is only multiplied by the impacts of COVID-19 on local governments, including public health impacts on staff and residents, financial impacts affecting small- and medium-sized businesses in the region, and decreased revenue and resulting staffing impacts on the local government agencies themselves.

While it is difficult to predict how many more jurisdictions will convert to EE projects as a result of the SNEW program's innovative features, the SNEW team believes its increased focus on marketing LGC services as part of SBC's larger local government and business innovation program, the efforts to support local government staff in project identification, development, and implementation, and the increased access to project financing will increase program uptake. By providing turnkey, hands-on services to rural jurisdictions and building even stronger relationships with project implementers, the SNEW program will not only result in proportionally more leads converting to actual projects but it will also reap additional triple-bottom-line community benefits in this region.

Program Management: The SNEW team is coordinated by Vice President of Climate & Energy Kerri Timmer and overseen by SBC President Steve Frisch. Team members meet weekly to review progress, discuss scheduling, highlight challenges or opportunities relative to changing market situations, and prioritize program activities for the coming week/month. The team also meets every other week with PG&E Program Manager Kate Schulenberg to review progress, discuss KPI status, and receive any programmatic guidance. Kerri Timmer manages general communications with PG&E, including All-Partner meetings and other PG&E-directed communications, while more specific or technical questions are handled directly by the appropriate team members.

Associated program activities and status of deliverables are tracked, managed, communicated, and reported to PG&E through: (1) SNEW's KPI Tracker for qualitative and quantitative metrics, (2) monthly invoice reports for more qualitative project information, and (3) quarterly KPI meetings with PG&E Project Manager. In addition, the SNEW team uses a web-based task management application to organize, track, and manage tasks across team members and program elements; and we meet weekly to collaborate, share project updates, identify cross-programmatic outreach opportunities, and address any roadblocks/challenges.

SNEW has a number of new processes and procedures in place for this contract period that will ensure we meet our goals and quality standards:

- *Project Management:* we have instituted a project management system called Asana that we use to map out tasks and track progress;
- *Activity Map and KPI Tracker:* SNEW team tracks our KPIs in an activity map so we have a snapshot at any given time as to our progress on KPI metrics, such as number of outreach calls or meetings, etc.
- *Meeting Agendas and Minutes:* SNEW team meets weekly and 1 on 1 meetings between Kerri and each team member either once or twice a month.
- *Time Allocations, Budget, and Project Priorities:* SNEW team time allocations are organized and tracked by management team, reviewed by team members on a weekly/monthly basis during team meetings, can be accessed by individuals in our time-tracking software Clicktime. This allows for ample opportunity to identify any issues or challenges that need addressing.

All in all, this allows for improved project management, best practices, and staying on track for day-to-day and over the entire life of the contract.

Risk Management: The team has also identified potential areas of program risk and devised a risk management approach for each one, including:

Table 3: Risk Assessment & Mitigation Plan

Risk	Risk Description/Drivers	Mitigation Plan
Inadequate marketing	The program's marketing and outreach approach fails to drive sufficient customer interest to successfully meet timeline and goals.	Reconfirm current needs, interests, and stressors or target customers through surveys, personal interviews, and event participation to understand how to improve outreach methods and/or messaging to more effectively reach target customers; further leverage SBC's non-EE programs to increase outreach; assign metrics and targets regarding reach and conversion of marketing efforts to identify problems before they become too big to address effectively.
Exceeding budget	Program activities exceed budget	Use our time-tracking software that allows pre-assignment of time allocations per person, per activity so everyone knows exactly how much time to work in order to remain within budget; continue weekly meetings where we review allocated-to-actual hours and can adaptively manage time and costs as needed.
EE market	Saturation on EE	Develop large pool of leads knowing that

saturation	measures, requiring proportionally more time to identify viable leads and qualify customers	certain leads will not move forward; analyze available data to target customers that have not conducted any EE projects or that have done projects but are due for upgrades; also focus on HTR, low-income, and high fire risk areas since these jurisdictions are likely focusing attention on community resilience and, therefore, may be more likely to pursue EE project work.
External delays	Expected and unexpected, delays by customer, contractor, or 3P implementer, which can affect contract deadlines and/or overall success	Use all SBC programs to increase our outreach and generate a large pipeline to frontload as much work as possible, thereby mitigating any down-to-the-wire projects; offer administrative and technical support services where possible so projects aren't slowed due to lack of capacity; schedule systematic follow-ups if a project stalls and create criteria for when to consider a customer as non-responsive.
Implementer resistance	Non-resource program success depends on partnering implementers who install the projects; the 3P implementer can choose not to act on our leads, which would affect program cost and level of success	Proactive outreach to eligible 3P implementers once they are identified by PG&E. Ensure services/activities aren't needlessly duplicative by focusing on how our approach or target audience can be differentiated from or augmentative to the 3P's work. Work more closely with trade pros who are willing to partner and act on the leads we generate.
Demonstrating savings	It is difficult to track jurisdictions that may pursue resource acquisition projects long after we've assisted them with project planning services or outreach/ education/training opportunities	We diligently track our KPIs as well as augment follow-up activities to track whether our initial efforts with a particular customer or region led to completed projects. Take advantage of any emerging tools or data sets, like the CATALENA Energy Data Tool, to help us better track results. Communicate regularly with implementing partners to confirm whether SNEW project leads resulted in completed projects.
Economic downturn (due to COVID-19)	Local government jurisdictions and S/M/B may not prioritize EE work due to constrained resources as a result of business	Utilize SBC and SBDC networking partnerships to market SNEW programs while assisting solution driven economic opportunities. Capitalize on the SBs and SBDC's trusted reputation. Continue to

	closures and associated decreased local government tax revenue resulting from COVID-19 and/or other unexpected community emergencies or natural disasters	promote SNEW's project management services as a resource to offset agencies' restricted capacity. Emphasize PG&E bill-neutral financing structure or offer in-house micro lending path for projects not eligible for OBF financing.
Energy technology trends	Growing interest in new and emerging technology may cause some agencies to bypass EE retrofits and invest instead in emerging technology outside of the PG&E EE portfolio.	Educate customers on industry "Best Practices" to encourage EE prioritization and reduce critical load prior to implementing renewable energy, microgrids or other emerging technology trends. This further minimizes investment costs opening up budgets to ongoing revolving loan opportunities.

Data Collection Plan: The team uses a KPI Tracker Excel spreadsheet, built on the PG&E "Activity Map" tool, to log all project activities and progress toward KPI targets as outlined in Tab H. The Tracker captures every action taken under each task and the month in which the action occurred so the SNEW team and PG&E Program Manager can gauge KPI progress in real-time. The team uses the Tracker to share information, identify needs or challenges, and allocate resources for the coming week/month to ensure that all project activities are moving forward. Tracker data rolls up to provide quarterly, program-year and final project metrics and contributes to the monthly invoice reports that describe outcomes.

For project-specific tracking SNEW uses the nonprofit Salesforce CRM platform to manage leads, accounts, contacts, campaigns, buildings/properties, and opportunities. Energy Insight (EI) provides the tool to create opportunity records for assignment to project implementers.

SNEW determines customer and project eligibility by: screening through EI to confirm the prospective client is a PG&E customer, is eligible for upgrades, is qualified for OBF, and is a high energy user. The team locates HTR and DAC customer areas through publicly available location data and screening through non-geographic CPUC HTR criteria. Using a mapping tool already developed by the team, SNEW then layers the data and prioritizes areas where projects can be bundled. SNEW also looks forward to the new CATALEENA tool to help identify and evaluate projects.

Specific data collection is necessary for benchmarking, project identification, and energy planning activities, with protocols as follows:

- *Project Identification:* collect the data as needed to check status and updates of building characteristics and to create campaigns; store data in EI and building characteristics and equipment in Salesforce; share data among SNEW team members, with customers, and with implementer(s), as appropriate.

- *Benchmarking*: SNEW helps customers collect their meter data through PG&E’s Building Benchmarking portal; enter the property/premise data into Portfolio Manager (updated monthly); and store meter data in Portfolio Manager and property data/building characteristics in SBC’s Salesforce CRM.
- *Other Energy Planning*: the team collects one-time historic data from customers’ internal records, if available, to establish baseline energy use; customers can collect reinventory year energy use data using the Green Button download process; data is stored in SBC’s password-protected Google Filestream, only shared with the customer and current SNEW team members who have signed NDAs.

To protect confidential/proprietary data, the SNEW team limits active Portfolio Manager and PG&E benchmarking portal logins, advises customers on data security, and limits data exports. The team also adheres to the cybersecurity controls required by PG&E and completes the required Third-Party Security Review as required, as well as complying with all PG&E and CPUC requirements.

4. Innovation

SNEW has incorporated a number of innovative features geared specifically toward overcoming obstacles and increasing uptake of cost-effective energy efficiency measures in this rural HTR region, including:

- a dual-focus solicitation approach that can attract customers to projects either directly or through conversion at the end of the planning process and activities;
- layered business services integrating LGP activities into existing SBC local government programmatic work to increase public sector benefits and achieve greater program uptake;
- customized messaging emphasizing “resiliency” in support of our local officials’ desire to act in the face of wildfire conditions and related public safety power shutoffs;
- improved access to information through an interactive web portal that not only provides useful information but also showcases other jurisdictions’ actions as a prompt to new participants;
- hands-on technical and project management assistance to build long-term capacity among jurisdiction staff while speeding advancement of project ideas in the short-term; and
- a regionally specific funding program that can make EE projects more economically viable in rural, HTR communities.

5. Metrics

The SNEW program has six key performance indicators (KPIs) to track progress toward program goals. These are outlined in the following Table.

Table 4: Program Performance Metrics

KPI	Definition	Metrics	Data Sources
# of Contacts	Measured by tracking active outreach with target jurisdictions	24/quarter 96/year 288/program duration	SNEW Activity Tracker; SBC Salesforce contact tracking
# of Leads	Leads developed through the pipeline and passed to eligible 3P implementers	12/year 36/program duration	SNEW Activity Tracker; SBC Salesforce contact tracking; Energy Insight for transfer of leads to 3Ps
# of audits or reports	Audits or reports prepared and presented to public sector entities and/or 3P implementers to generate project work	15/year 45/program duration	SNEW Activity Tracker; monthly reports
# of projects managed	Projects managed and/or technical assistance provided to jurisdictions in need of support to make up for lack of internal capacity	12/year 36/program duration	SNEW Activity Tracker; monthly reports
# of educational opportunities offered	Educational opportunities provided, especially in HTR/DAC areas, to increase jurisdictions' EE knowledge base and understanding of programs and financing options available to support projects	20/year 60/program duration	SNEW Activity Tracker; monthly reports
# of EAPs completed	Use of planning activities, such as inventorying, benchmarking, and EAP development, to advance energy savings through long-term goal setting and guidance toward project identification/implementation	1/year 3/program duration	SNEW Activity Tracker; monthly reports



6. To-Code Savings

The SNEW LGP program is a non-resource program and therefore does not include savings related to code compliance.

7. Pilots

The SNEW LGP program does not propose any pilot projects.

8. Workforce Education & Training

As a non-resource program, SNEW conducts all work and provides all services using in-house staff. While SBC itself is engaged in workforce education and training activities, those activities are not related to the SNEW LGP program.

9. Workforce Standards

SNEW is a non-resource program. As a result, SNEW projects do not involve construction, demolition, installation, maintenance, or repair work; and all program services and activities are provided by in-house staff of Sierra Business Council.

SBC complies to the extent applicable with CPUC mandated general Workforce Standards. SNEW team members have been fully vetted as employees of Sierra Business Council, and each has an accredited degree and multiple years' experience working in the EE and related fields. As a non-resource program with no construction, demolition, installation, maintenance, or repair services, SNEW has neither HVAC nor Advanced Lighting Control programs or projects that would trigger the specific accreditation standards outlined in this section.

10. Disadvantaged Worker Plan

As part of SBC's Small Business Development Center program, Disabled Veteran-Owned, Women-Owned, Minority-Owned, and LGBT-Owned businesses (as defined by the CPUC and California's Office of Small Business & Disabled Veteran Business Enterprise Services) are informed about how they can apply for certification and access contracting opportunities, including with SBC's or SNEW's own programs. In addition, when working with local jurisdictions on project and/or bid development, SBC and SNEW advise clients on how they can incorporate disadvantaged business enterprise status into the bidding process and requirements.

11. Additional Information

No additional information is provided.

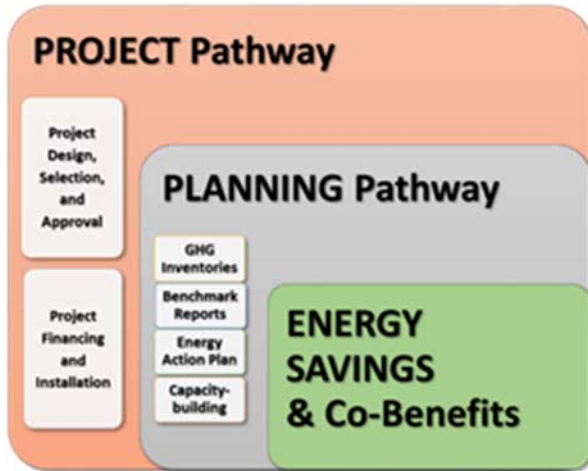
Supporting Documents

1. Program Manuals and Rules

SNEW includes information about various eligibility criteria and customer screening processes in the *Program Manuals* section below and in our draft management plan. As a

non-resource program, we believe a formal program manual is not applicable since our program does not involve actual measures nor does it work directly with contractors.

2. Program Theory & Logic Model



The SNEW team has identified a number of challenges with working in largely rural, HTR areas, including insufficient jurisdictional staff capacity, inadequate financial resources to undertake projects, lack of concise information and data to support decision-making by local government leaders, and lack of access to funding to help make it easier to commit to implementing projects.

The SNEW team uses a dual pathway approach to help overcome those challenges. For agencies that have completed energy action or climate plans but need help implementing those plans, SNEW offers project identification, design, and installation support through the

Project Pathway. For jurisdictions with outdated plans or those that have not previously outlined an energy reduction strategy, SNEW works with agency staff through the Planning Pathway to initiate leads that result in energy savings. SNEW also partners with HTR and DAC local governments to identify and support underserved SMB customers in their communities.

By marketing our services as part of SBC's larger local government and business innovation program, supporting local government staff in project identification, development, and implementation, and working to increase access to project financing, we believe we can generate greater program uptake. And our focus on providing turnkey, hands-on services to meet rural jurisdictions where they are in their process -- whether that begins with planning or jumps straight to project identification and development -- we believe we will be able to generate proportionally more leads converting to actual projects and also reap additional economic and social sustainability benefits for PG&E's customers.

3. Process Flow Chart



4. Incentives Tables, Workpapers, Software tools

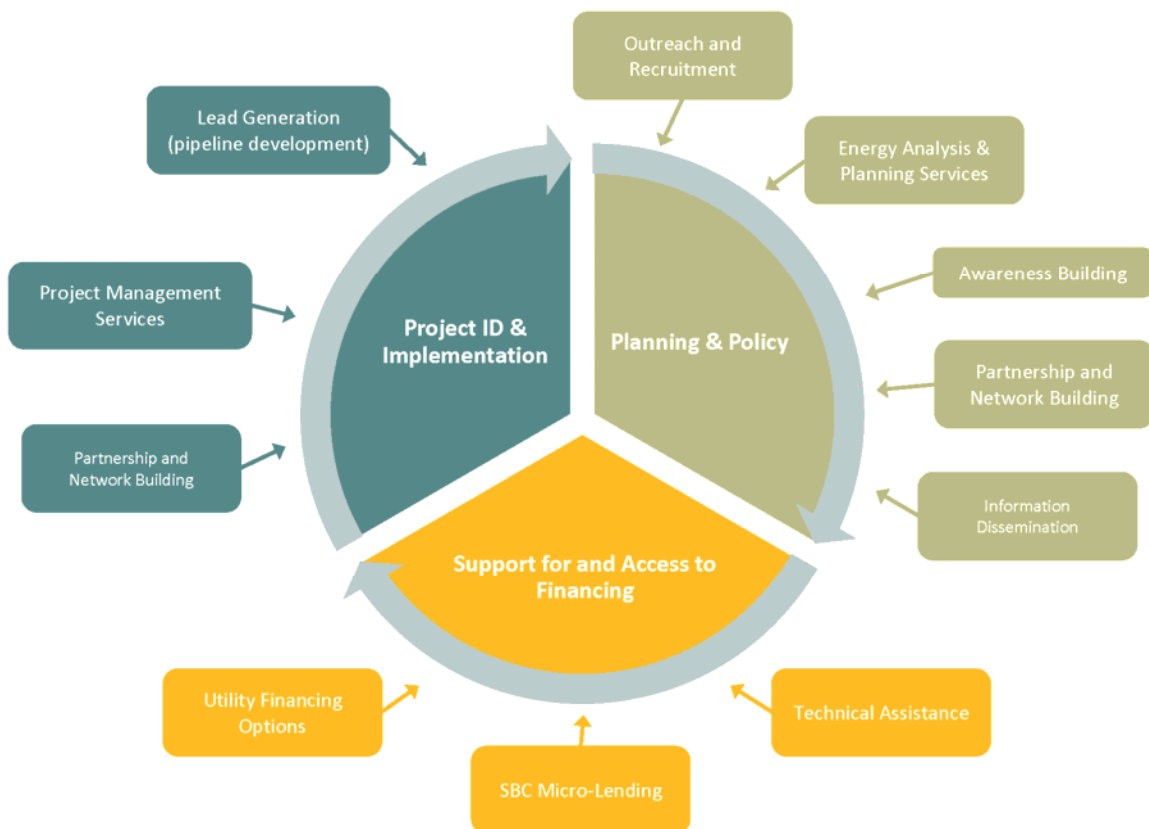
The SNEW LGP program is a non-resource program that does not use incentives or specific measures. As a result, we do not employ measure and incentive tables. Depending on our relationship with eligible 3P implementers, we may utilize the Modified Lighting Calculator (MLC) to help estimate savings as part of the audit and lead generation process; but that remains to be seen based on the approval of 3P providers by PG&E and what services they are comfortable with SNEW providing.

For benchmarking our team uses Energy Star Portfolio Manager (ESPM) and the PG&E Benchmarking Portal. We also use Energy Insight to gather necessary data for benchmarking, customer identification, and communicating with PG&E reps and other third parties. Currently we use ICLEI’s ClearPath tool for GHG inventories and plan to create our own internal tool in the near future to perform that task once access to ClearPath sunsets at the end of 2020. To manage our work, we will use internal tools like Asana for task management and prioritization and Salesforce for customer relationship management and opportunity tracking.

5. Quantitative Program Targets

This section is not applicable to SNEW, as SNEW is a non-resource program.

6. Diagram of Program



7. EM&V

Because SNEW is a non-resource program, the standard EM&V process is not applicable.

8. NMEC

NMEC is not applicable to the SNEW LGP program at this time. It is possible we might have some interface in the future, especially as we continue supporting OBF projects working directly with TradePros and once we get past outside influences such as COVID, PSPS events, etc., that may be slowing the implementation of NMEC programs.

Program Manuals

1. Eligible Measures

The SNEW LGP program is a non-resource program that does not use incentives or specific measures; therefore, we do not have measure eligibility requirements.

2. Customer Eligibility Requirements

- SNEW determines customer and project eligibility by: screening through EI to confirm the prospective client is a PG&E customer, is eligible for upgrades, is qualified for OBF, and is a high energy user.
- The team locates HTR and DAC customer areas through publicly available location data and screening through non-geographic CPUC HTR criteria. Using a mapping tool already developed by the team, SNEW then layers the data and prioritizes areas where projects can be bundled.
- SNEW also looks forward to the new CATALEENA tool to help identify and evaluate projects.

3. Contractor Eligibility Requirements

SNEW is a non-resource program. As a result, SNEW projects do not involve construction, demolition, installation, maintenance, or repair work; therefore, SNEW does not utilize licensed contractors in its program of work.

4. Participating Contractors, Manufacturers, Retailers, Distributors, and Partners

SNEW is a non-resource program. As a result, SNEW projects do not involve construction, demolition, installation, maintenance, or repair work; therefore, SNEW does not utilize licensed contractors, manufacturers, retailers, or distributors in its program of work.

5. Additional Services

There are no additional services to describe beyond what has been addressed in the body of the Implementation Plan.

6. Audits

The SNEW LGP program is a non-resource program and relies on PG&E Trade Pros, Implementers or ESCOs to perform site audits, prepare cost estimates and energy savings calculations. SNEW may perform preliminary assessments to inform the project identification

process, categorize leads, and connect customers with suitable contractors, implementers, or ESCOs.

7. **Sub-Program Quality Assurance Provisions**

Any project commitments initiated by SNEW and handed off to a 3P implementer are required to be reviewed by a QA provider to verify accuracy and compliance with methodologies, assumptions, and savings results. The SNEW team would be involved in the QA process in instances where SNEW submits the OBF loan Pre-Install Application packet through Energy Insight on behalf of the customer or while serving as the project developer prior to handoff to a Trade Pro implementer. Communications would continue in Energy Insight between the QA team and SNEW during pre-install and post-install review, if SNEW is serving as the project developer.

The SNEW team ensures that all trainings, materials, and products/deliverables reflect best practices within the industry, as determined through the team's ongoing research and monitoring of PG&E communications, industry regulations, and energy efficiency-related coalitions and organizations. The SNEW team also monitors customer satisfaction through regular communications and evaluation forms and takes immediate action to resolve any issues affecting customer experience or satisfaction with SNEW services. Specific actions include:

- Review and augment SNEW's current list of industry associations/information aggregation services;
- Update or initiate new registration on appropriate websites/listservs to receive regular information about technology advances and other information;
- Assign a team member to review and analyze new information shared through these websites/listservs;
- Agendize regular discussions with the team to review new information that could affect SNEW's materials, outreach, or deliverables;
- Conduct technical review of all program content, curriculum, and associated materials prior to distribution or use;
- Develop and implement evaluation forms for trainings and other customer services to determine level of satisfaction with SNEW programs and products.

8. **Other Program Metrics**

Please see **Table 4: Program Performance Metrics** on p. 14 for information on tracking and evaluation activities, including data collection and performance analysis and metrics.

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