

Comprehensive Multifamily Incentive
(CoMFI) Program
Implementation Plan

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PROGRAM OVERVIEW

The Comprehensive Multifamily Incentive (CoMFI) program ("Program") is a Residential Multifamily Whole Building program which seeks to realize significant energy savings for Multifamily customers, property managers and owners in the Southern California Gas Company ("SoCalGas") service territory. To accomplish this, the Program will provide customized concierge style services to customers, including no-cost energy audits, incentive reservations, construction oversight and project closeout. Customers that successfully complete a qualifying high efficiency whole building retrofit will receive incentive amounts based on the level of energy efficiency achieved and up to 50% of the total project cost or 65% of the total project cost for properties in Disadvantaged Communities (DAC) or Hard To Reach (HTR) communities.

PROGRAM BUDGET AND SAVINGS

1. **Program and/or Sub-Program Name:** Comprehensive Multifamily Incentive (CoMFI) Program
2. **Program / Sub-Program ID number:** SCG3705

Program information as noted in items 3 through 10 below are available through the California Energy Data and Reporting System (CEDARS).

3. **Program/Sub-program Budget Table**
4. **Program/Sub-program Gross Impacts Table**
5. **Program/Sub-Program Cost Effectiveness (TRC)**
6. **Program/Sub-Program Cost Effectiveness (PAC)**
7. **Type of Program/Sub-Program Implementer**
8. **Market Sector(s)**
9. **Program/Sub-program Type**
10. **Market channel(s) (i.e., downstream, midstream, and/or upstream) and Intervention Strategies (e.g., direct install, incentive, finance, audit, technical assistance, etc.), campaign goals, and timeline.**

IMPLEMENTATION PLAN NARRATIVE

1. PROGRAM DESCRIPTION

The Program aims to provide deep energy savings in the multifamily sector. The Program will target both market-rate and affordable customers with an increased focus on customers in DAC and HTR communities. These target audiences align with the Program's focus on equity and the California Public Utilities Commission (CPUC) Environmental and Social Justice (ESJ) Action Plan.

The Program will provide participating customers with a wide range of assistance for their energy efficiency projects from inception to completion. The Program Implementer (PI) will be the primary point of contact for customers to answer any questions, including technical questions, and provide Program assistance when needed. Customers will receive a no-cost energy audit and a tailored report with a savings and financial analysis of the facility's natural gas equipment. When requiring a contractor to perform the work, the customer will be connected with SoCalGas Trade Professionals or licensed contractors that can perform the work. For customer requiring financing options, the customer will be connected with SoCalGas On-Bill-Financing (OBF) department to determine available options. In addition, the Program will offer a wide variety of energy efficiency measures that can be installed under the Program and qualify for incentives. The following are a few measure offering examples: Water heating, space heating & cooling, common area & dwelling unit measures, envelope, and emerging technologies.

Assistance provided by the Program will help customers overcome barriers that are common with energy efficiency projects. Generous incentives and financing options will help alleviate financial barriers. The Program will also assist customers in selecting a combination of inexpensive measures with larger, more expensive, and highly efficient measures to meet Program guidelines. To help customers achieve deep energy savings, the Program offers Whole Building energy efficiency measures that will target areas with high energy efficiency potential. In addition, customers will benefit from two Program pathways, including a simplified path that will help customers receive their incentive faster and a more advanced path to realize greater energy savings that includes emerging technology measures.

2. PROGRAM DELIVERY AND CUSTOMER SERVICES

To better serve participating customers, the Program will offer two project pathways that are designed to expedite the incentive process or achieve greater energy savings, depending on the measures selected for installation. The Program will select the project pathway based on the following definitions:

The Whole Building Comprehensive Solutions Path ("Comprehensive Path"): If the comprehensive bundle of measures identified for potential upgrades have current and valid workpapers, the savings for energy efficiency measures will be calculated using deemed measure package values. Please refer to [Figure 2: Comprehensive Path](#) for the full process flow diagram for this project path.

The Whole Building Advanced Comprehensive Solutions Path (“Advanced Path”): If at least one of the measures identified for potential upgrades merits and requires custom calculations based on the nature and the extent of the retrofit(s), the project will be selected for the Advanced Path. These projects will adhere to the latest Statewide Custom Project Guidance Document provided by the CPUC. Please refer to [Figure 3: Advanced Path](#) for the full process flow diagram for this project path.

The Program will include three main project stages for each project. The project stage will identify the order of tasks, submission of deliverables and approval processes required for that stage. Project stage 1 applies to both project pathways while project stage 2 and 3 are unique to each project pathway. Please refer to [Figure 2: Comprehensive Path](#) and [Figure 3: Advanced Path](#) process flow charts for a visual of the project stages.

All customer projects will follow the first project stage that includes, customer engagement, building audit & baselining, and scope of work development as described below:

Customer Engagement

The Program will oversee customer engagement through the following approaches:

1. Top-Down Approach
 - a. The PI will be the primary point of contact for all customer communications and will perform targeted outreach using data analytics obtained from the SoCalGas or public sources.
 - b. The primary modes of outreach will be directing customer contact, attending industry trade shows, conferences, hosting events such as webinars, mailing, and emailing.
 - c. SoCalGas Account Executives will raise awareness of the Program and perform targeted customer outreach.
2. Bottom-Up Approach
 - a. The Program will work with participating contractors (including SoCalGas Trade Professionals) that are licensed and have experience in design and/or installation of Program measures.
 - b. The PI will work with SoCalGas to vet any potential participating contractors that do not have experience in the customer Segment or other criteria deemed necessary.
 - c. The PI will work with SoCalGas to onboard and train qualifying contractors on Program processes and procedures.
 - d. Customers introduced by participating contractors will be subject to an onboarding process by the Program to ensure compliance.
3. Leveraging Programs Within SoCalGas Territory
 - a. The Program will coordinate with the Energy Savings Assistance Multifamily Whole Building (ESA MFWB) Program to cross-refer qualified customers in SoCalGas service territory to either program.

- b. The PI will leverage appropriate programs within municipal utilities and water districts that overlap with SoCalGas's service territory to obtain qualified customer leads.
 - i. The PI will ensure that customer engagement policies and privacy guidelines from the leveraged municipal utilities and water districts are followed.
 - ii. The PI will seek to explore and include additional measures that support whole building retrofits from water and electricity partners.
- 4. Customer Driven Engagement
 - a. To better serve customers inquiring on their own initiative through SoCalGas, the PI will work to brief SoCalGas Account Executives and SoCalGas call centers on program eligibility and offerings.
 - b. Customer inquiries received through these channels will be directed to the PI.

Building Audit & Baselineing

The Program will provide an in-depth evaluation of customer's natural gas equipment with a no-cost energy audit to identify potential natural gas energy efficient upgrades. The customer's natural gas billing data along with the existing equipment will be used to assess the energy baseline of the building to identify potential energy efficiency measures and utility incentives available for the customer.

Prior to commencing any work, written authorization from the customer to conduct a no-cost energy audit will be collected. The energy audit will consist of a site visit and walkthrough of the facility to gather common area and dwelling unit natural gas equipment. Pictures and video of relevant natural gas consuming equipment will be collected to assess the make, model, vintage, and performance specifications.

An interview with the customer will be conducted to identify relevant information about the property, the equipment, and any financial constraints or details that could impact the project. In addition, the following data from the customer will be gathered: recent equipment upgrades or replacements and deferred maintenance plans, if applicable.

Scope of Work Development

The data collected during the site audit, including existing equipment, will be used to develop a list of feasible measures that the customer can install in their facility based on Program requirements to receive incentives for installed equipment.

The customer will receive a summary report detailing the results of the site audit. The summary report will include a list of feasible measures to replace aging or inefficient natural gas equipment with high efficiency equipment, estimated project cost, estimated savings and incentive amount, and simple payback. The list of feasible measures will be developed based on the existing equipment's age, efficiency, and technology type among other criteria that will save energy over the life of the equipment.

Program representatives will review the energy audit report and list of feasible measures with the customer to develop a Scope of Work (SOW) that meets program requirements. Estimated energy savings used in the summary report will be based on deemed measure packages approved by the state, and custom calculation methodology approved by SoCalGas Engineering Services (ES) and the CPUC's Custom Measure and Project Archive (CMPA), when applicable.

Program representatives will work with customers to finalize their SOW that must consist of Program qualified measures that will be installed as part of the energy efficiency project. Once the customer makes the final selection of SOW, the Program will identify the pathway the project will be required to follow. Projects that consist solely of energy efficiency measures that have current and valid workpapers will follow the Comprehensive Path, all other projects will go through the Advanced Path.

COMPREHENSIVE PATH

Projects selected for the Comprehensive Path will follow the following process:

Scope of Work Finalization

Program representatives will assist customers with questions regarding energy efficiency measures or Program requirements. Program guidelines require a minimum of four energy efficiency measures to be installed for all projects, including at least one core measure.

Core measures are energy efficiency measures that require significant customer capital to install. These measures may include high efficiency domestic hot water equipment, envelope upgrades, high efficiency space heating, and solar thermal water heating. A core measure generally affects 75% of all dwelling units at the site.

If the customer has a participating contractor they would like to use to perform the installations, the Program will help the customer review the bid, provide additional help, and construction management as needed to move the project forward.

If the customer does not have a participating contractor selected, the Program will connect the customer with a SoCalGas Trade Professional or licensed contractor to install their selection of measures. The Program will help the customer review the bid and provide additional help, and construction management as needed to move the project forward.

All participating customers must finalize a SOW based on Program guidelines to continue.

Comprehensive Energy Audit Report

A comprehensive energy audit report will be provided to the customer after the customer finalizes the scope of work. The report will provide the customer with a comprehensive understanding of the measures they will be installing in their facility. The comprehensive energy audit report will contain the following information: Initial site conditions, findings, supporting documentation and a savings and financial summary of recommended energy efficiency measures with their respective payback periods, annual savings, and the customer's incentive tier.

Reservation Form

Once the customer's project has been approved based on Program guidelines, the customer will be provided with a formal incentive reservation through a reservation letter. The reservation letter must be signed by the customer or decision maker and returned to the Program to continue.

Construction

Once the Program receives the signed reservation letter and an executed contract, a formal Notice-To-Proceed will be issued to the customer. The Notice-To-Proceed will need to be signed by the customer or decision maker and returned to the Program to continue.

The Program will conduct periodic check-ins via phone calls and/or emails with customer (and/or participating contractor(s)) to ensure the project is constructed and fulfilled according to agreement. Additionally, the Program will provide construction management support to customer and participating contractor(s) from project initialization through construction completion.

Customers must notify the Program when construction has been completed.

Desktop Closeout

Once the project has completed construction, Program representatives will schedule and conduct a post-installation site audit inspection. The inspection will consist of verify the approved energy efficiency measures were installed with the specified efficiencies and requirements detailed in the reservation letter and executed contract to ensure projected savings are achieved.

All projects completed through the Program will be subject to the post-installation inspection. If approved measures deviate from the installed measures, Program representatives will inform the customer and participating contractor(s) of any unsatisfactory condition. Once the customer or participating contractor(s) address identified issues, Program representatives will verify the satisfactory completion of the work or reject the project and report to SoCalGas. SoCalGas will inspect projects completed through the Program at a random sampling rate upon their discretion.

A post-installation review packet of the project will be compiled following the completion of construction and receipt of all project documentation required by the Program guidelines. The post-installation review packet shall consist of project documentation required from all stages, post-installation report, and Energy Efficiency Collaboration Platform (EECP) form. The packet will be uploaded to EECP upon completion for review and processing by SoCalGas.

The Program will issue the incentive to the customer (or contractor as approved by the customer) within ten to fifteen business days of receiving project incentive payment from SoCalGas.

ADVANCED PATH

Projects selected for the Advanced Path will follow the following process:

Scope of Work Finalization

Program representatives will assist customers with questions regarding energy efficiency measures or Program requirements. Program guidelines require a minimum of four energy efficiency measures to be installed for all projects, including at least one core measure.

Core measures are energy efficiency measures that require significant customer capital to install. These measures may include high efficiency domestic hot water equipment, envelope upgrades, high efficiency space heating, and solar thermal water heating. A core measure generally affects 75% of all dwelling units at the site.

If the customer has a participating contractor they would like to use to perform the installations, the Program will help the customer review the bid, provide additional help, and construction management as needed to move the project forward.

If the customer does not have a participating contractor selected, the Program will connect the customer with a participating contractor(s) to install their selection of measures. The Program will help the customer review the bid and provide additional help, and construction management as needed to move the project forward.

All participating customers must finalize a SOW based on Program guidelines to continue.

Project Feasibility Study Report

The Project Feasibility Study (PFS) report is a CPUC required document for custom projects. The Program will complete a PFS report for every custom project that has had its scope of work finalized. The PFS report shall adhere to the latest Statewide Custom Project Guidance Document provided by the CPUC and utilize the latest PFS template provided by the CPUC.

The Program will submit PFS reports and project information to SoCalGas on a bi-monthly basis. Upon review, SoCalGas will communicate ES instructions on review and approval or request additional information and calculations. Program representatives will prepare the necessary information and documents for ES review in a Document Packet. The packet will be comprised of the PFS, ES request form, and project documentation inclusive of customer influence and supporting project files. Feedback received from ES will be addressed on a project-by-project basis accordingly.

Once ES has approved selected projects, Program representatives will assist with the submission of the approved projects into the CPUC's CMPA. The Program will provide all relevant project documentation to the CPUC's CMPA staff upon receiving the Supplemental Data Request (SDR). Feedback received from the CPUC will be addressed accordingly.

Reservation Form

The Program will provide a formal incentive reservation notice to customers through a reservation letter once the project has been approved based on Program guidelines and has passed CMPA review. If the CPUC has rejected the project through the CMPA process the Program will notify the customer of said rejection via a formal notice and if feasible revise the project for resubmission to CMPA. The reservation letter must be signed by the customer or decision maker and returned to the Program to continue.

Construction

Once the Program receives the signed reservation form and an executed contract, a formal Notice-To-Proceed will be issued to the customer. The Notice-To-Proceed will need to be signed by the customer or decision maker and returned to the Program to continue.

The Program will conduct periodic check-ins via phone calls and/or emails with customer (and/or participating contractor(s)) to ensure the project is constructed and fulfilled according to agreement. Additionally, the Program will provide construction management support to customer and participating contractor(s) from project initialization through construction completion.

Customers must notify the Program when construction has been completed.

Desktop Closeout

Once the project has completed construction, Program representatives will schedule and conduct a post-installation site audit inspection. The inspection will consist of verify the approved energy efficiency measures were installed with the specified efficiencies and requirements detailed in the reservation letter and executed contract to ensure projected savings are achieved.

All projects completed through the Program will be subject to the post-installation inspection. If approved measures deviate from the installed measures, Program representatives will inform the customer and participating contractor(s) of any unsatisfactory condition. Once the customer or participating contractor(s) address identified issues, Program representatives will verify the satisfactory completion of the work or reject the project and report to SoCalGas. SoCalGas will inspect projects completed through the Program at a random sampling rate upon their discretion.

A post-installation review packet of the project will be compiled following the completion of construction and receipt of all project documentation required by the Program guidelines. The post-installation review packet shall consist of project documentation required from all stages, post-installation report, and EECP form. The packet will be uploaded to EECP upon completion for review and processing by SoCalGas. The Program will issue the incentive to the customer (or contractor as approved by the customer) within ten to fifteen business days of receiving project incentive payment from SoCalGas.

For the post-installation review packet, projects which were selected for ES review, may be subject to further review by ES at their discretion and will require the project to complete an additional review.

3. PROGRAM DESIGN AND BEST PRACTICES

The lack of access to funds is one of the greatest barriers to completing energy efficiency projects. This barrier is even more significant for DAC and HTR properties. Being mindful of this, the Program was designed to provide additional incentives to communities in need. The Program has incorporated the following two strategies to target these communities and provide additional financial assistance:

- **Conducting data-informed targeting:** The Program will use data provided by SoCalGas, third parties and publicly accessible tools to identify properties located in census tracts meeting DAC and HTR criteria as defined by the CPUC. Based on this list, dedicated outreach and marketing personnel will conduct targeted outreach to property managers and owners.
- **Higher incentives for DAC and HTR communities:** The Program will offer DAC and HTR customers an additional incentive of 15% project cost to participate in the Program.
- **Community partners:** The Program will work with community partners trusted by potential DAC and HTR customers to build Program awareness and increase participation from DAC and HTR communities.

Customers also face barriers in navigating energy efficiency programs and identifying which program best fits their need. To mitigate this barrier the Program will implement the following:

- **Collaboration and Coordination with Other Programs:** The Program will collaborate with the Southern ESA MFWB Program to receive referrals and have the Program serve any customers for whom ESA is not the right fit. The Program will also refer customers to other SoCalGas programs, as applicable.

4. INNOVATION

The Program will implement a new and innovative approach using analysis of historical program data (e.g., measure mixes, project cost, processes, customer acquisition, direct implementation, administrative cost and marketing expenses). Our proposed strategies include:

Deep intervention: The program is designed to seek and realize aggressive and equity focused goals by providing concierge style services to customers. Customers who participate in the Program will be provided with:

- Technical assistance to drive them to project execution
- A comprehensive bundle of cost-effective energy efficiency measures with relevant financial analysis and estimated savings
- Project management assistance and timelines for successful project completion

Focus on OBF: OBF will help drive participation into the Program and assist customers with financial capital at zero percent interest.

Comprehensive Measure Bundle: Creating a measure mix that balances inexpensive in-unit measures with more expensive deep savings measures to decrease the overall cost for the targeted customers and projects, ensuring that Program dollars go further and deliver more Program savings.

Simplified project path: The Comprehensive Path was designed to expedite the review process and capitalize on the customer's interest in the Program, it is anticipated that the vast majority of projects will go through this path. This path will not require projects to go through a lengthy CMPA review due to the Program measure offerings and selection of measures by the customer.

Substantial per-unit incentive structure: The Program will implement a substantial incentive per dwelling unit located at properties that will expand Program savings by eliciting greater interest from:

- Both large and small properties: Large properties, with more units per dwelling, will have access to more incentives, allowing for larger scopes of work and deeper savings. Small properties will also benefit as they may receive greater incentives from the Program compared to rebate programs.
- DAC and HTR communities, who historically struggle with financial barriers (both owners and tenants), will benefit from the substantial per-unit tiered incentive structure and increased project cost coverage cap.
 - Both Tenants and Owners will pay less for utility bills.
 - Tenants will have access to reliable energy efficient retrofits resulting in increased tenant comfort.
 - Owners will have greater access to capital via Program incentives and OBF to purchase new high efficiency equipment.
- As an option to the customer, the Program may facilitate property owners and managers to select the contractor that performed the installation as their payee. This option provides a compelling incentive for Trade Allies and participating contractors by encouraging their collaboration and interest in the Program to the customer's benefit.

Emerging Technologies: The Program includes emerging technology measures that can help customers achieve greater energy savings.

- Gas Absorption Heat Pump (GAHP): Included as part of Program, the current CPUC approved workpaper SWWH033-02 measure offerings is for DHW end-use and is eligible under the Comprehensive Path. Space Heating and Cooling end uses also available with the implementation of the GAHP may be eligible under the Advanced Path.
- Other emerging technologies: These can be included in a project through the Advanced Path offered by the Program.

5. METRICS

The table below identifies and defines the Key Performance Indicators (KPIs) for the Program and describes how each KPI will be tracked. These KPIs shall be the primary means of assessing the Program's performance on an ongoing basis.

Table 1: Program Metrics

SoCalGas Metric	KPI	KPI Definition
Affected Dwelling Units	Number of Dwelling Units Touched. Projected: 500-550 Average Monthly	Number of dwelling units affected by Program.
Program Enrollment	Stage 1 Projects Projected: 20 Average Monthly	Number of stage 1 projects enrolled in Program.
Program Enrollment	Stage 2 Projects Projected: 50% Conversion Rate.	Conversion rate of projects that move from stage 1 to stage 2.
Program Enrollment	Stage 3 Projects Projected: 85%	Conversion rate of projects that move from stage 2 to stage 3.
Program Enrollment	DAC Projects Projection: 40%	% of all projects enrolled in Program located in DAC.
Program Enrollment	HTR Projects: Projection 10%	% of all projects enrolled in Program classified as HTR.
Energy Savings	First Year Energy Savings Delivered	To date % achieved of energy savings goal split on an even pro rata basis.
Energy Savings	Lifecycle Energy Savings Delivered	To date % achieved of lifecycle energy savings goal split on an even pro rata basis.
N/A	Cost Effectiveness Alignment	Actual TRC Ratio/Pre-Program Approved TRC Ratio.
Cost Per Unit Saved	Levelized PAC Cost	Actual /Forecasted levelized PAC cost.
N/A	Diverse Business Enterprise Spend	To date % DBE spend/DBE commitment % (identified in Schedule F).
N/A	Program Administration and Implementation	Based on Implementor's reporting/data quality, timeliness, invoicing issues, meeting expectations.

6. FOR PROGRAMS CLAIMING TO-CODE SAVINGS

To-code savings are not applicable for the CoMFI Program.

7. PILOTS

Pilot projects are not applicable for the CoMFI Program.

8. WORKFORCE EDUCATION AND TRAINING

The PI will not be directly installing energy efficiency measures and therefore will not be providing any workforce education or training.

9. WORKFORCE STANDARDS

General Workforce Standards: For both PI-recommended and customer-selected participating contractors, the PI verifies they possess all relevant certifications to complete the work, such as C-4 Boiler, Hot Water and Steam Fitting, C-10 Electrical and C-36 Plumbing, before work commences. Because Program requires permit finalization before incentive disbursement, potential participating contractors without relevant certifications cannot close permits or receive payment. The PI will also ensure Program staff maintains certifications relevant to their roles. For example, the PI inspectors have Building Performance Institute (BPI), Home Energy Rating System (HERS) and Natural Gas Appliance Testing qualifications. The PI will work with SoCalGas to negotiate other workforce standards and will provide training to staff, as applicable.

Prescriptive Workforce Standards: The Program only anticipates claiming energy savings from natural gas end uses. As lighting does not meet this criterion, the prescriptive workforce standards for Advanced Lighting Control programs or Projects do not apply to the Program.

SoCalGas is interested in understanding hiring outcomes that result from its energy efficiency programs. SoCalGas is also encouraging the PI to partner with training or apprenticeship programs such as community colleges and set goals for employment or partnership with disadvantaged workers. The PI shall track and provide this information to SoCalGas in the format designated by SoCalGas on a monthly basis and at completion of the contract. As a result of this, the PI will provide the following:

1. Number of new employees
2. Number of job promotions
3. Number of disadvantaged workers as defined by CPUC
4. Partnership and/or employment goals and results from partnering with training or apprenticeship programs such as community colleges
5. Percent of incentive dollars spent with a demonstrated commitment to provide career pathways to disadvantaged workers
6. Reporting on other metrics as defined in the Disadvantaged Worker Plan (DAW)

10. DISADVANTAGED WORKER PLAN

As a Minority Business Enterprise (MBE), the PI will engage thoughtfully in the recruiting process to attract, hire and retain individuals well-suited for our work. The PI hires diverse candidates and strives to facilitate an environment where all team members feel safe showing up authentically. For example, 11 of the PI LA office team members reside in DACs. The PI's approach to supporting job access for Disadvantaged Workers will include:

- Requiring recruiting practices that actively promote workplace diversity, equity and inclusion, including redacting personal information (name, gender and educational institutions) from applications/resumes during initial reviews to address unconscious bias, tracking demographic data of applicants and hires and accepting work experience in lieu of education.
- Coordinating with industry partners that provide training and job-related services such as the Career & Workforce Readiness program, workforce development partners, community colleges, apprenticeship programs, career centers and CBOs to outreach to communities through job fairs, community events, social media and other digital outlets.
- Working with contractors who have historically served DAC and HTR customers and hired from those communities.
- Maintaining an Equity and Inclusion Task Force, which identifies opportunities for improvements and provides recommendations regarding policies and practices that ensure RHA is continuously evolving to support all team member.

11. ADDITIONAL INFORMATION

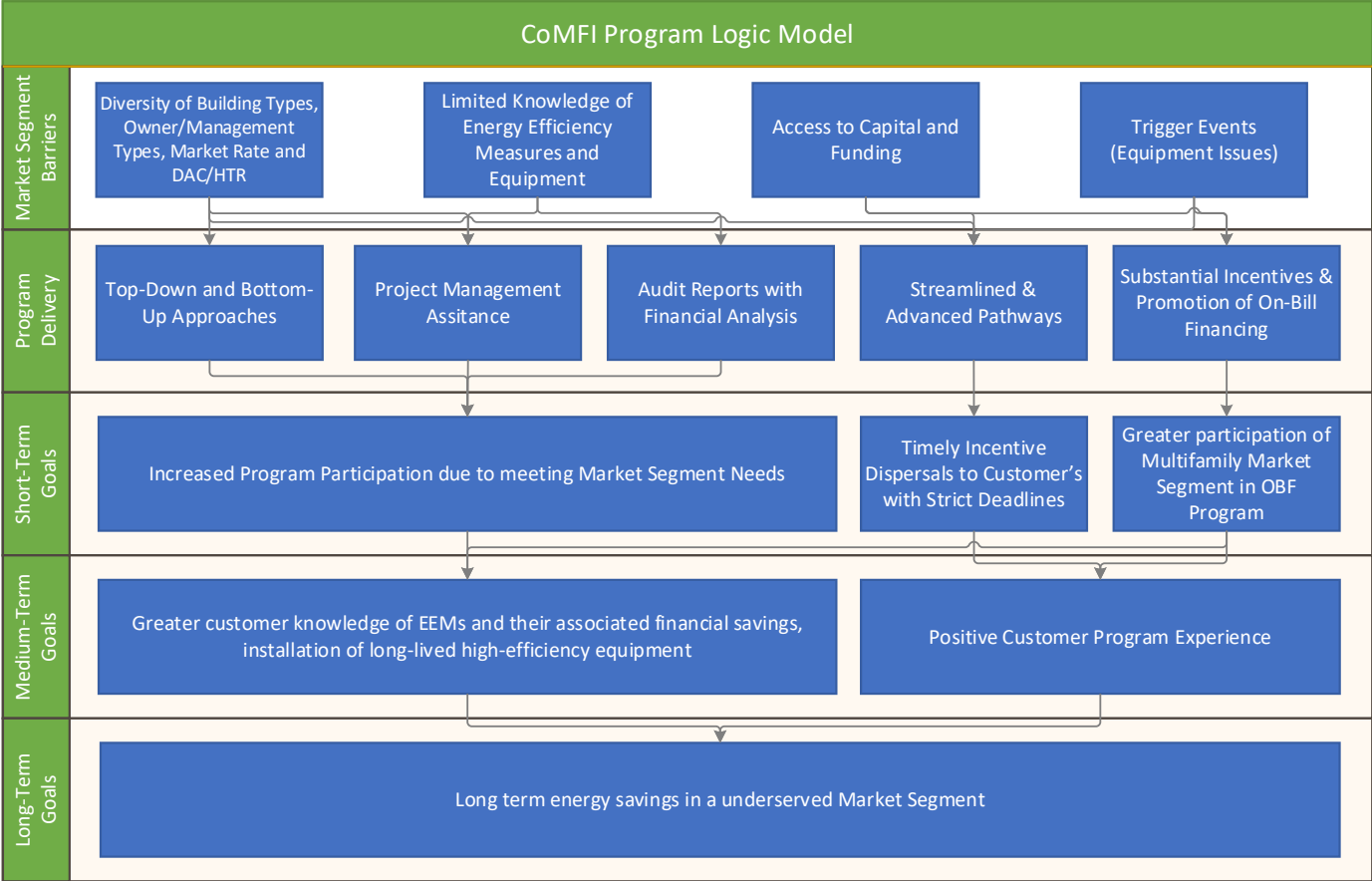
This section is not applicable for the CoMFI Program.

SUPPORTING DOCUMENTS

Attach the following documents (in PDF format):

1. Program Manuals and Program Rules (See below)
2. Program Theory and Program Logic Model:

Figure 1: Program Logic Model



3. Process Flow Charts: The Program includes two project pathways, the Comprehensive Path and Advanced Path. The process flow for each project pathway is as follows:

Figure 2: Comprehensive Path

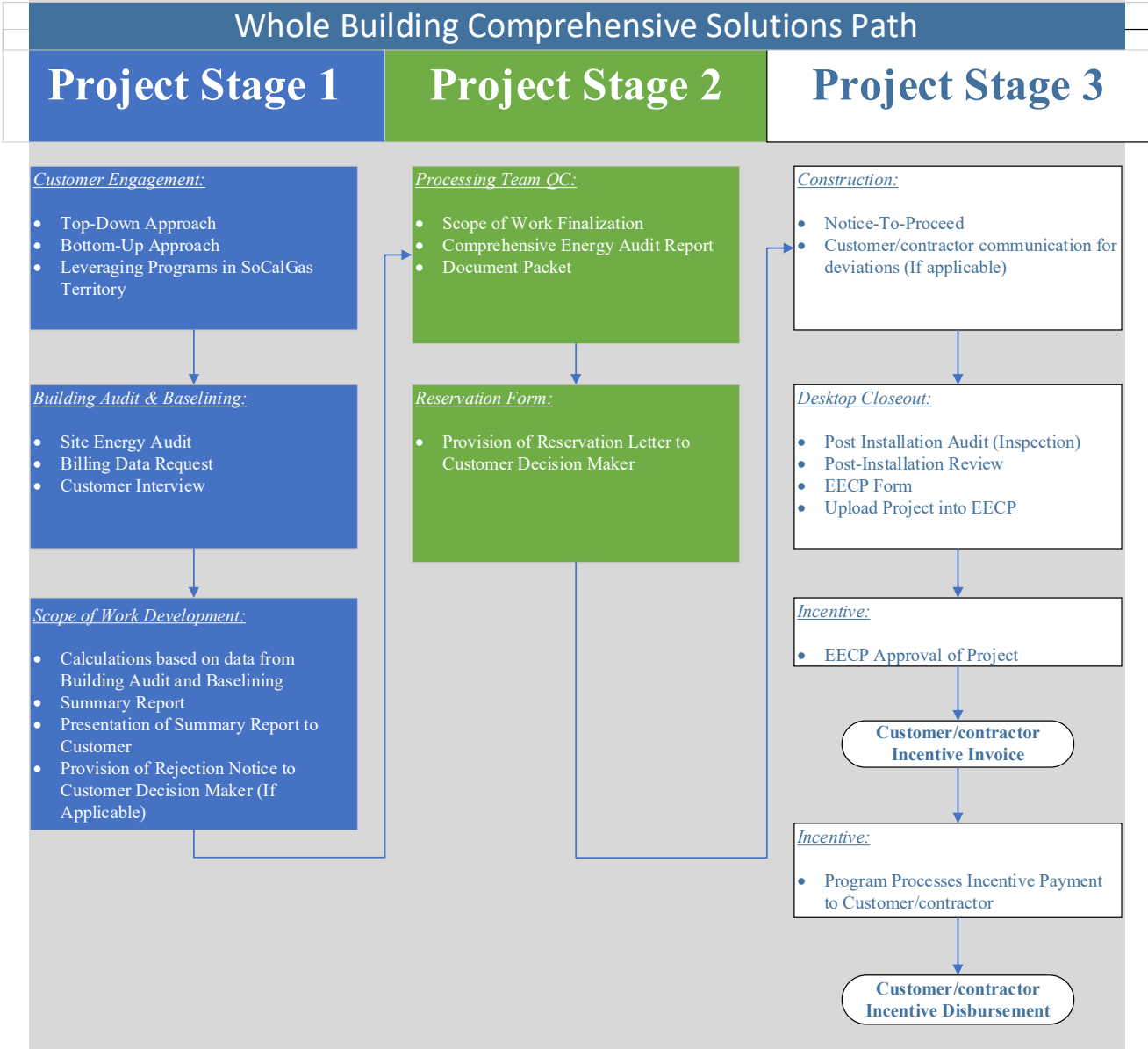
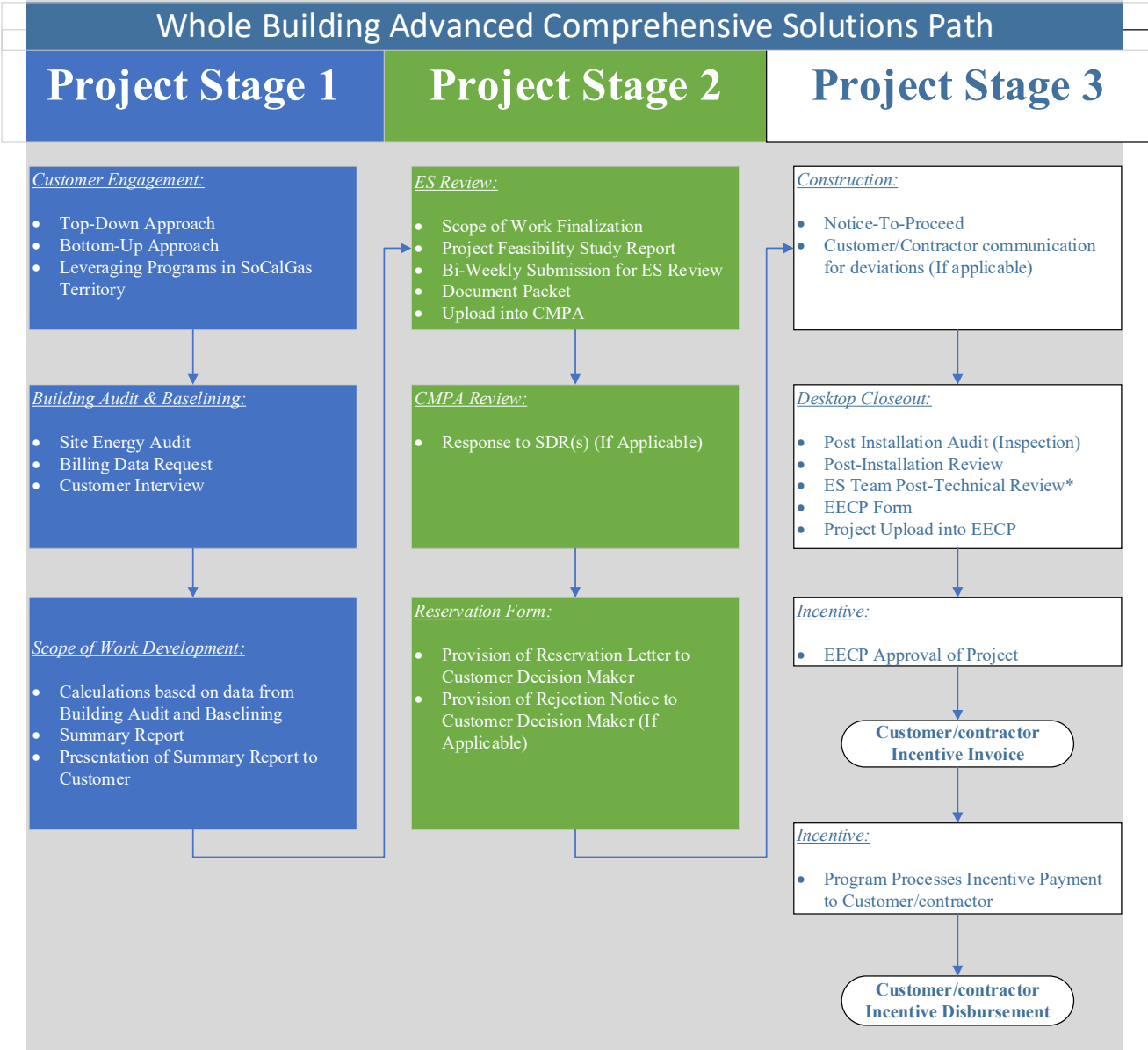


Figure 3: Advanced Path



4. Incentive Tables, Workpapers, Software Tools: The measures in the following table will be eligible for incentive in the Program. Measures in projects designated to go through the Comprehensive Path will have their savings estimated using the appropriate Measure Package.¹

Table 2: Measure List

#	Measure Name	Delivery Type	Measure Package*	Applicable Statewide Measure Offering ID(s)**
1	Clothes Washer Residential	Deemed	SWAP004-03	A, B, C, D, E, F, G, H
2	Ceiling Insulation, Residential	Deemed	SWBE006-02	A, B, C, D, E, F
3	Furnace, Residential	Deemed	SWHC031-03	A, B, C
4	Smart Thermostat, Residential	Deemed	SWHC039-06	C, D, E, F
5	Domestic Hot Water Loop Temperature Controller, Multifamily & Commercial	Deemed	SWWH016-03	A, B, C, D, E, F, G, H, I, J
6	Hot Water Pipe Insulation, Nonresidential and Multifamily	Deemed	SWWH017-04	A, B, C, K, L, J
7	Demand Control for Centralized Water Heater Recirculation Pump, Multifamily & Commercial	Deemed	SWWH015-03	A, B, C, D, E, F, G, H, I, J
8	Central Storage Water Heater, Multifamily	Deemed	SWWH011-02	B, C
9	Boiler, Multifamily	Deemed	SWWH010-02	B, C
10	Space Heating Boiler, Commercial & Multifamily	Deemed	SWWHC004-05	Q, D
11	Tankless Water Heater, Residential	Deemed	SWWH0013-03	J, K, M, N
12	Storage Water Heater, Residential	Deemed	SWWH012-03	M, N, O
13	Faucet Aerator Residential	Deemed	SWWH001-03	A, B, C, D, I, J, K, L,

¹ To view the listed Measure Packages, visit [ETRM \(caetrm.com\)](http://ETRM.caetrm.com).

#	Measure Name	Delivery Type	Measure Package*	Applicable Statewide Measure Offering ID(s)**
14	Low-flow Showerhead - Residential	Deemed	SWWH002-03	A, B, C, D, E, F, G, H, I, J
15	TSV with and without an Integrated Low-Flow Showerhead, Residential	Deemed	SWWH003-02	A, B, C, D, E, F, G, H, I, J, K
16	Diverting Tub Spout with TSV, Residential	Deemed	SWWH023-02	I, J
17	Solar Thermal Water Heating System, Commercial and Multifamily	Deemed	SWWH034-01	A
18	Gas Heat Pump Water Heater, Multifamily	Deemed	SWWH033-02	A
19	Heater for Pool or Spa, Commercial and Multifamily	Deemed	SWRE003-03	D, E
20	Placeholder for Additional Custom Measures	Custom	N/A	N/A

* Workpaper Measure Package version number will be updated as needed.

** Applicable Statewide Measure Offering ID(s) will be updated as needed.

The incentive structure is based on engineering-based savings calculations, that pays a fixed dollar amount per dwelling unit based on projected savings. The total incentive will be based on the lower of the amount calculated in the tables above.

The minimum natural gas savings percent a customer must reach to receive incentive is 5%. Customers who fall in between incentive tiers will qualify for tier achieved. For example, a customer who reaches 19% savings, will only qualify for the 15% incentive tier. The Program does not offer prorated incentives for projects whose savings fall between tiers.

Table 3: Incentive Tier

Tier	Gas Savings	Incentive Amount per dwelling Unit
1	5%	\$300
2	10%	\$425
3	15%	\$570
4	20%	\$630
5	25%	\$750

The Program's incentive offerings are intended to be consistent with the finding of law adopted in CPUC Decision D.18-05-041².

In addition to the incentive tiers, incentives awarded cannot exceed more than the maximum project cost coverage identified by the Program. The maximum project cost coverage will depend on the customer's project property location. DAC and HTR communities will receive a maximum project cost incentive of 65%, market-rate customers will receive a maximum project cost incentive of 50%.

Table 4: Maximum Incentive

Site Type	Maximum Project Cost Coverage
Market Rate	50%
DAC	65%
HTR	65%

5. Quantitative Program Targets:

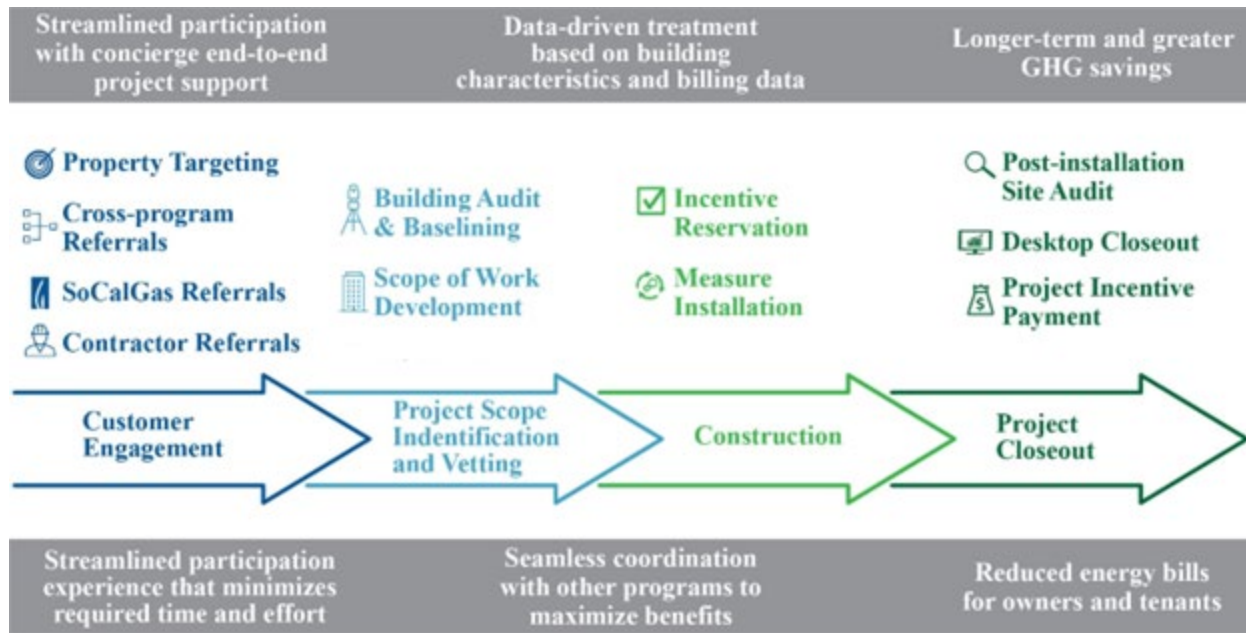
Table 5: Program Targets

Target	Maximum Project Cost Coverage
First Year Projects	155
Total Projects	464
First Year Dwelling Units Affected	8,525
Total Dwelling Units Affected	25,520
First Year # of DAC and HTR Projects	77
Total # of DAC and HTR Projects	232
First Year Incentives to Customers	\$4,082,583.50
Total Program Incentives to Customer	\$12,279,271.50

² CPUC D. 18-05-041, P. 169 – 170.

6. Diagram of Program:

Figure 4: Program Diagram



7. Evaluation, Measurement & Verification (EM&V):

To conduct EM&V, the Program expects to primarily rely upon:

- Deemed estimations supported by Database for Energy Efficient Resources (DEER) or CPUC-approved workpapers.
- Calculated estimations supported by CPUC-approved workpapers, energy code calculation methodologies and approved energy modeling software.
- Custom calculations as recommended in the Title 24 Residential Alternative Calculation Method Reference Manual for unique projects and measures with no available workpaper.
- Other reasonable approved calculation methods and procedures for Measurement and Verification (M&V), if requested.

Data Collection and Tracking: For all projects, PI will:

- Confirm and record all eligibility criteria, by screening customers via phone, SoCalGas bills, EECF's Double Dip Report, etc.
- Collect and report evidence of influence in accordance with the CPUC's Custom Project Review Guidance to show that the customer was the primary driver for the project.

- Collect any site-specific and project information, including building vintage, meter consumption, current equipment, equipment efficiency ratings, equipment age, number of dwelling units, measures to be installed, savings per measure, etc., documenting with photos and videos, as allowed by the customer.
- Collect three years of billing data from SoCalGas to calculate the average baseline consumption data for the property.
- Document evidence for accelerated-replacement measures, in accordance with CPUC Resolutions E-4818 and E-5115, showing that functioning equipment was replaced with more efficient equipment because of the Program assistance and efficiency incentives.

Ensuring Accuracy and Completeness: The Program will apply established processes, practices, and checkpoints to ensure accuracy of Program data reported. All assessments, audits and estimated savings will undergo a Quality Assurance (QA) and Quality Control (QC) review by an assigned energy engineer to evaluate accuracy, completeness, and attention to detail as well as address any issues if present before reviewing with the customer or uploading to EECF for incentive processing. The Program will conduct pre- and post-installation reviews, as well as on-site audits for all projects enrolled.

The Program will also be responsible for submitting completion paperwork detailing any changes to the scope and adjusting the reported savings and incentives as needed. In addition, all projects will undergo a final QA/QC process by the ES team if enrolled in the Advanced Path and by the SoCalGas Program team for the Comprehensive Path projects.

PROGRAM MANUALS

Program Manual included below:



CoMFI Program
Manual.docx