

Southern California Gas Company
IDEEA 365 – K12 Public Schools Program
Implementation Plan
PY2024-2025



K12 Public Schools Program Implementation Plan (K12PSP)

SoCalGas IDEEA 365

February 16, 2024

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I. Program Overview

The K-12 Public Schools Program (K12PSP) is a unique program targeted at school districts needing technical assistance, operation and maintenance planning, and no-cost tank-type, efficient water heater upgrades. The K12PSP is implemented by Okapi Architecture Inc. (Okapi) as a third-party provider on behalf of Southern California Gas Company (SoCalGas). Public school districts with campuses within SoCalGas service territory and located in disadvantaged communities (DAC) and/or qualified Hard-to-Reach (HTR) may be eligible for program participation.

Historically, an all-too-common practice of school district maintenance and operation (M&O) departments is to replace energy-consuming equipment at the point of failure. Such practices cause an emergent need that is costly due to the lack of planning for resource allocation, leaving little to no time for consideration for energy efficiency evaluation or implementation. K12PSP is a direct install program designed to overcome such barriers by engaging school districts early on to create a strategic plan for replacing natural gas-fired tank-type water heaters. The program will also offer ancillary items such as pre-rinse valves and aerators for self-installation. Additionally, cross-promotion of other utility program offerings, such as water efficiency programs and other financial options (e.g., on-bill financing, Inflation Reduction Act funding), may be discussed.

Initial engagement will begin with a district's overall hot water assessment throughout campuses located in a DAC or districts considered HTR once the district signs the K12PSP Letter of Interest. Okapi will generate an assessment report that includes the campus' hot water heater/boiler measure inventory, including the equipment's number, type, age, and condition. Once Okapi completes the report, the Okapi team will share it with district staff to aid in determining the appropriate EE actions. The final stages for participation include the district signing of the K12PSP agreement, prioritizing EE measure installations, Okapi scheduling, and commencing EE equipment installations.

Program Budget and Savings

- 1. Program and/or Sub-Program Name**

K12 Public Schools Program (K12PSP)

- 2. Program / Sub-Program**

ID SCG3956

- 3. Program / Sub-Program Budget Table:**

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

- 4. Program / Sub-Program Gross Impacts Table:**

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

5. **Program / Sub-Program Cost Effectiveness (“TRC”):**
Please refer to the California Energy Data and Reporting System (CEDARS) for the following program details.
6. **Program / Sub-Program Cost Effectiveness (“PAC”):**
Please refer to the California Energy Data and Reporting System (CEDARS) for the following program details.
7. **Type of Program / Sub-Program Implementer:**
Third-Party Delivered Program
8. **Market Sector(s):**
K-12 Public Schools
9. **Program / Sub-Program Type:**
Resource
10. **Market Channel(s) Downstream and Intervention Strategies:**
Direct-Install

II. Implementation Plan Narrative

1. Program Description:

The K12PSP program is a water heater tank-type replacement program utilizing the direct install program strategy. In addition, the program offering includes a self-installed low-flow pre-rinse spray valve or up to five water heating-aerator faucets.

The overall process for involvement includes:

1. Identify eligible public unified school districts (USDs or districts) with K-12 school campuses located within DACs and/or USDs defined as HTR (HTR/DAC customers as defined by SB535) that meet the program’s water heater replacement criteria.
2. Provide marketing and outreach to such districts through centralized efforts with district M&O staff involvement.
3. Schedule district board presentations and secure memorandums of understanding (MOUs) where necessary.
4. Secure appropriate district representative signatures for program initiation.
5. Evaluate site/facility tank-type water heating replacement opportunities by performing an energy audit (ASHRAE Level 1) and data collection.
6. Secure signature for program agreement.
7. Install energy-efficient tank-type water heaters and provide customers with high-efficiency water fixture aerators or low-flow pre-rinse spray valves for self-installation.
8. Validate energy efficiency measure savings claims upon project closing.

9. Provide program survey results and quarterly reporting to the utility.

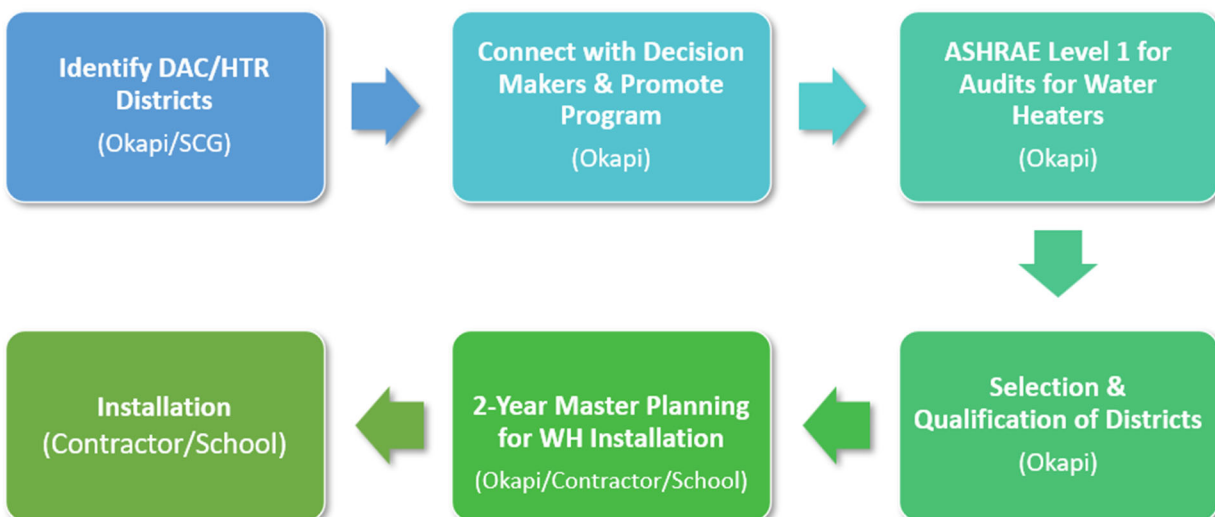
The Okapi team will coordinate with SoCalGas to ensure no program overlap of the selected sites with other SoCalGas local or statewide EE programs.

Understanding a District's needs, including developing the budget and funding allocation processes, coordinating installations with the academic calendar to minimize the impact on the customer's student instruction, and effectively connecting with decision-makers are all critical components to meet District needs for system upgrades. With decades of experience, Okapi understands such challenges and is committed to leveraging its existing network within the K-12 public sector to promote and implement K12PSP.

K12PSP creates trusted partnerships with public school districts utilizing the simple yet effective process for engagement, assessment, and installation. Through energy audits of school campuses located in DACs, the program identifies opportunities to upgrade the efficiency of existing hot water heaters. K12PSP uses bulk purchasing to lower the EE equipment costs by providing a no-cost, direct install approach.

2. Program Delivery and Customer Services:

Performs energy audits and installs EE tank-type water heaters for eligible public K-12 DAC/HTR school facilities through a no-cost, direct install approach.



3. Program Design and Best Practices:

Okapi will leverage its existing K-12 school networks to promote the program. The networks are wide and expansive, ranging from school boards to staff on design, maintenance operations, etc.

Some of Okapi's existing networks are from direct contact; some are from professional affiliates. The protocol of a school's decision-making, steps to follow-up, and program implementation are generally similar yet could be widely different. Our approach is always "LISTEN and SERVE".

Initially, the program will focus on selected DAC/HTR areas in San Bernardino, south Los Angeles, and San Gabriel. The targeted regions may expand to other areas of the SoCalGas service territory.

Once a school is selected, we will identify the school's needs, the head of operations, and the relevant decision-makers to develop the appropriate implementation process. We will also utilize the onsite maintenance staff's expertise and knowledge of the site to expedite the assessment. Instead of the maintenance staff, we may need to rely on an outside plumbing vendor to obtain the required information. Usually, we can identify the hot water needs through communication and data exchange, and if necessary, we will make a field visit to conduct an energy audit.

We will track project timelines, manufacturer/contractor pricing, delivery, and performance standards. Okapi utilizes a "Lessons Learned" approach to improve each additional project. Every project completion has an opportunity to better the next.

We will track project timelines, manufacturer/contractor pricing, delivery, and performance standards.

Intelligent Customer Targeting, Outreach, and Engagement

The customer targeting, outreach, and engagement will be as follows:

Strategies and Tactics

Once the program starts, we will use E-blast to send marketing materials to the targeted customers. We will present the program details to those districts that express interest during an introductory meeting and discuss the district's conditions, operations, and barriers.

- Sign the Letter of Interest with the customer to enroll them in the program.
- Initiate the assessment process.
- Obtain necessary site data.

Marketing Update Schedule

Okapi Marketing Review & Adjustment (Weekly, Monthly, Quarterly & Annually)				
Marketing Tracking Sheets	Weekly	Monthly	Quarterly	Annually
1. Research & New Prospective	X			X
2. E- Blast & Professional Network Collaboration		X		
3. Website Articles to Promote Client's Achievements			X	X
4. New Projects Retained		X	X	X
5. Projects Progress Status, EE Goals	X	X	X	X
6. Project Completion Data Collection			X	X
7. Client's Survey			X	X

Technical Assistance

K12PSP provides the district with an ASHRAE Level 1 audit pertaining to water heaters x of the targeted campuses.

Customer Incentives

K12PSP is a straightforward, direct install program that provides efficient water heater tank upgrades at no cost to the district or school.

Direct Install

Okapi will use a qualified licensed subcontractor(s) to install the energy-efficient tank-type water heaters.

Financing

K12PSP will inform the school districts about options regarding potential funding sources to fund additional EE projects beyond the K12PSP offering. The potential funding sources may include awareness of on-bill financing and IRA funding opportunities.

4. Innovation:

K12PSP will promote energy efficiency to public K-12 facilities in DACs and HTR-eligible schools within the SoCalGas service territory.

Historically, an all-too-common practice of school district M&O departments is to replace energy-consuming equipment at the point of failure. Such practices cause an emergent need that is costly due to the lack of planning for resource allocation, leaving little to no time for consideration for energy efficiency evaluation or implementation. K12PSP is a direct install program designed to overcome such barriers by engaging school districts early on to create a strategic plan for replacing

natural gas-fired tank-type water heaters. It may include ancillary items such as pre-rinse valves and aerators.

K12PSP replaces inefficient tank-type water heaters with energy-efficient replacements. The program will provide up to five water aerators or one low-flow pre-rinse spray valve at no cost.

5. Metrics:

#	KPI	SoCalGas Metric	KPI Definition
1	Number of Districts Participating	Program Participation	Amount of Outreach to the number of Districts
2	Assessments to be performed	N/A	Number of ASHRAE Level 1 audits conducted on a monthly basis
3	Project Installations Delivered after Program Launch starting in Month 4	Installations	Achieved monthly number compared to projected goal
4	Hard to Reach and Disadvantaged Communities	Penetration of EE	Number of installations in schools in DAC
5	Program Administration and Implementation	N/A	Based on Contractor's reporting/ data quality, timeliness, invoicing issues, meeting expectations Criteria: Timely Response for out-of- scope requests - Proactive in continuous program delivery - On-time invoice and Monthly report- Quality of Deliverables- Willingness to partner- Communication

6. For Programs Claiming To-Code Savings:

N/A

7. Pilots:

N/A

8. Workforce Education and Training:

N/A

9. Workforce Standards:

At all times during the term of the Agreement, Okapi shall comply with, and shall cause its employees, agents, representatives, subcontractors, independent contractors, and all other persons performing the Services on Okapi's behalf to comply with, the workforce qualifications, certifications, standards and requirements set forth in the CPUC Workforce Standards. Prior to commencement of any Services, once per calendar year, and at any other time as may be requested by SoCalGas, Okapi shall provide all documentation necessary to

demonstrate to SoCalGas' reasonable satisfaction that Okapi has complied with the Workforce Standards.

10. Disadvantaged Worker Plan:

All direct installation work conducted on behalf of this program will align with CPUC guidelines as defined for Disadvantaged Worker policies. Okapi will demonstrate best efforts to recruit contractors that have installers that reside in the DAC area by providing information to prospective contractors on the Disadvantaged Workers program and documenting the contractor's DAC installers work with this program. Additionally, Okapi will report monthly on the ongoing program activities supporting the CPUC Disadvantaged Worker policies to SoCalGas.

11. Additional Information:

Okapi will monitor CPUC decisions or rulings and revise the program as applicable.

III. Supporting Documents

The following documents are attached to the Implementation Plan:

Attach the following documents (in PDF format):

1. Program Manuals and Program Rules
2. Program Theory and Program Logic Model
3. Process Flow Chart
4. Incentive Tables, Workpapers, Software Tools
5. Quantitative Program Targets
6. Diagram of Program
7. Evaluation, Measurement & Verification (EM&V)
8. Normalized Metered Energy Consumption (NMEC) – N/A



PROGRAM MANUALS & PROGRAM RULES

K12 Public Schools Program
(K12PSP)

February 5, 2024

Supporting Documents

Attach the following documents (in PDF format):

1. Program Manual and Program Rules:

Overview

The K-12 Public Schools Program (K12PSP) is a unique program targeted at school districts needing technical assistance, operation and maintenance planning, and no-cost tank-type, efficient water heater upgrades. The K12PSP is implemented by Okapi Architecture Inc. (Okapi) as a third-party provider on behalf of Southern California Gas Company (SoCalGas). Public school districts with campuses within SoCalGas service territory and located in disadvantaged communities (DAC) and/or qualified- Hard to Reach (HTR) may be eligible for program participation.

K12PSP creates trusted partnerships with public school districts utilizing the simple yet effective process for engagement, assessment, and installation. Through energy audits of school campuses located in DACs, the program identifies opportunities to upgrade the efficiency of existing hot water heaters. K12PSP uses bulk purchasing to lower the EE equipment costs by providing a no-cost, direct install approach.

K12PSP starts on December 31, 2023, and ends on December 31, 2025.



PROGRAM MANUAL

K12 Public Schools Program
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Program Manual

All programs must have manuals uploaded in CEDARS to clarify the eligibility requirements and rules of the program for implementers and customers. Program rules must comply with CPUC policies and rules. Table templates are available at CEDARS. At a minimum, manuals should include:

1. **Eligible Measures or Measure Eligibility, if applicable:** Provide requirements for measure eligibility or a list of eligible measures.

Measure Description	Size Thresholds	Criteria
Small storage water heater	<= 75 kBtu/hr, 40-gal, med. draw,	0.64 UEF or greater
Small storage water heater	<= 75 kBtu/hr, 50-gal, med. draw,	0.64 UEF or greater

2. **Customer Eligibility Requirements:**

To be eligible for program participation, the end user must be in SoCalGas' service territory with an active account. In addition, the end user may not have received an incentive for the same measure installation from SoCalGas in the previous five years.

K-12 schools in the public sector are defined by the North American Industry Classification System (NAICS) codes listed below. Publicly owned facilities are included in the following NAICS codes:

61 – Educational Services

3. **Contractor Eligibility Requirements:**

Okapi will provide a licensed subcontractor for the installation of tank-type water heaters.

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

When Okapi confirms the selection of contractor(s) for installations, we will notify SoCalGas.

Additional Services:

N/A

5. **Audits:**

ASHRAE Level 1 audits pertaining to water heaters will be performed.

6. **Sub-Program Quality Assurance Provisions:**

Inspections

Okapi will inspect (or provide an independent subcontractor who will inspect) and verify (per specification) that measures/projects in the program are properly installed. All inspections performed shall conform to the procedures described in the approved Quality Assurance Plan.

In addition, Okapi or its subcontractor shall conduct the necessary measurement and verification of energy savings per requirements in the Measurement and Verification Plan.

Tools and Activities

As required.

7. Other Program Metrics:

N/A



PROGRAM THEORY & PROGRAM LOGIC MODEL

K12 Public Schools Program
(K12PSP)

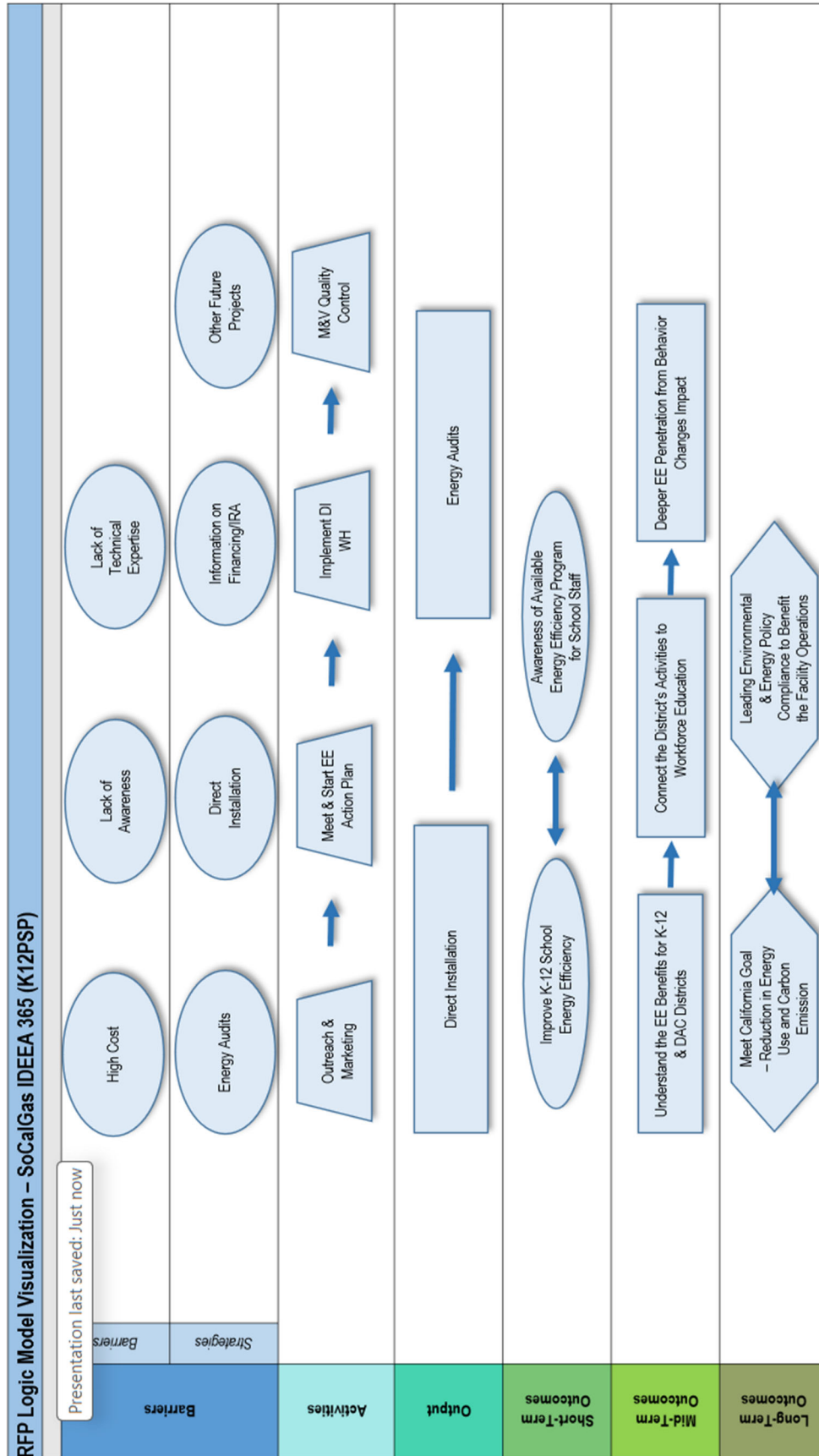
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2. Program Theory and Program Logic Model:

The program theory is accessing, educating, and replacing inefficient storage tank-type water heaters with more efficient ones in K12 public school campuses located in DAC in San Bernardino, south Los Angeles, and San Gabriel.

Program Logic Model

The activities listed in the Program Logic Model below lead to program outputs and short-term, mid-term, and long-term outcomes.



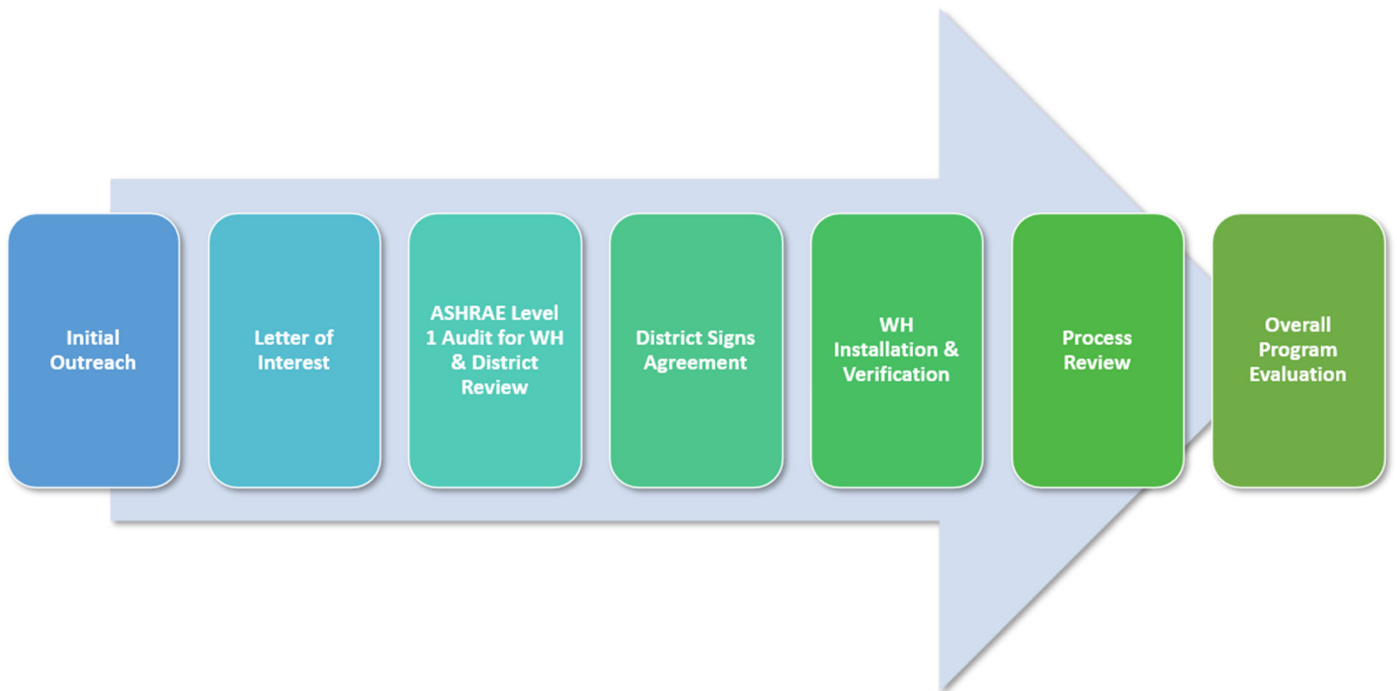


PROCESS FLOW CHART

K12 Public Schools Program
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3. Process Flow Chart:



Process Details:





INCENTIVE TABLES, WORKPAPERS, & SOFTWARE TOOLS

K12 Public Schools Program
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4. Incentive Tables, Workpapers, Software Tools:

Measure Description	Workpaper
Small storage water heater - 40-gal, med. Draw, 0.64 UEF	SWWH007D
Small storage water heater - 50-gal, med. Draw, 0.64 UEF	SWWH007F



QUANTITATIVE PROGRAM TARGETS

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5. Quantitative Program Targets:

Table 1. Annual Schools Served

Forecasted Number of Schools Served by Program Year	
Program Year	Schools Served
2024	16
2025	24

Table 2. Annual Energy Savings

Forecasted Energy Savings by Program Year	
Program Year	Gross Therm Savings
2024	1,025
2025	1,485

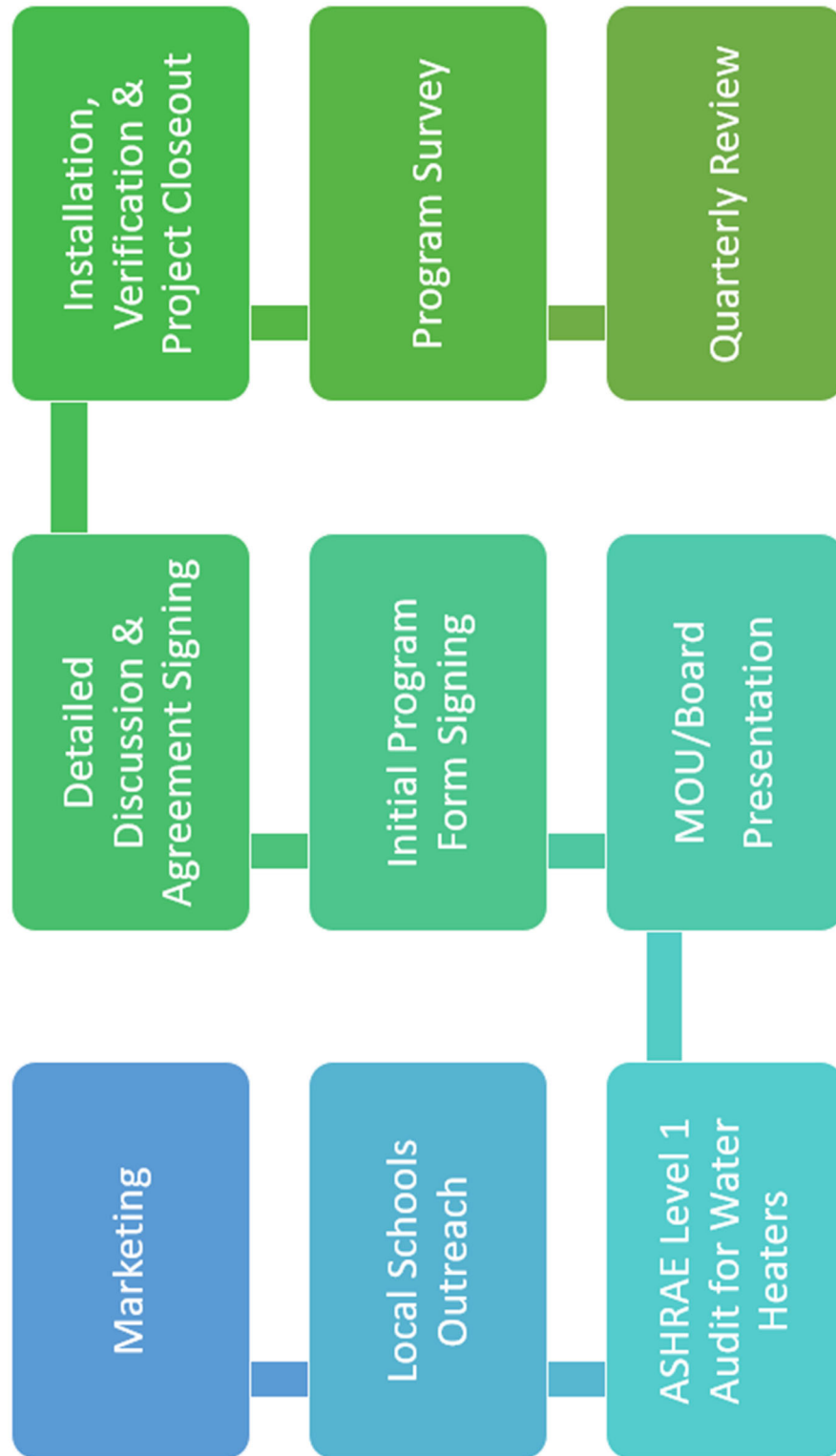


DIAGRAM OF PROGRAM

K12 Public Schools Program
(K12PSP)

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6. Diagram of Program:



Identify Eligible Participants

- K-12 public school district campuses considered DAC/HTR located in San Bernardino, southLos Angeles, and San Gabriel areas.

Marketing and Outreach

- Launch email blasts.
- Conduct telephone outreach.
- Attend school district board meetings.
- Engage M&O facility staff.

Customer Education

- Identify EE opportunities.
- Provide ASHRAE Level 1 audits.

Energy Engineering and Technical Assistance

- Provide technical expertise through facility audit and data collection.

Measurement and Verification (M&V) of Program

- Apply applicable workpapers for deemed measures.



EVALUATION, MEASUREMENT & VERIFICATION (EM&V)

K12 Public Schools Program
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7. Evaluation, Measurement & Verification (EM&V):

Deemed measures will be evaluated, claimed, and reported based on the CPUC-approved workpapers. The program will track program participation of K-12 districts and campuses, and data collection shall be reported to SoCalGas. In support of future program evaluation, Okapi is committed to providing any data necessary for evaluation.

- The program developed a Quality Assurance (QA) plan that ensures a structured approach to support verification, validation, and traceability. Throughout the program, data integrity checks are completed by program staff to ensure accurate reporting. The program's developed Measurement and Verification (M&V) plan covers M&V requirements for deemed measures savings estimations that follow the guidance provided in CPUC-approved work papers. Where appropriate, pre-installation site visits will be conducted by staff to verify customer-supplied baseline data and document any discrepancies between customer-supplied information and data collected onsite. Deemed measure workpapers will be reviewed quarterly to ensure full CPUC compliance.
- Examples of the data collected for the program is provided below:
 - SiteID – A unique identifier for the installed location of the incentivized equipment, including Customer Name, Address, and Meter Number(s) per CPUC D23-06-055.
 - EquipmentID - A unique identifier for each unit of incentivized equipment on the site
 - Measure Size category – General size or capacity range specific to each measure type; for example, HVAC equipment would be AHRI product type and size range.
 - Equipment manufacturer – Manufacturer of the incentivized equipment, e.g., Carrier, Trane, Nest, Philips, GE, etc.
 - Equipment model number – Manufacturer number that can be used to lookup size, features, performance, etc. for the incentivized equipment.
 - Rated capacity – Actual size, capacity, load rating, etc., for the incentivized equipment.
 - Rated efficiency unit (EfficUnit) – The engineering unit basis for the efficiency or performance rating, e.g., Unit Energy Factor (UEF), thermal efficiency (TE), SEER (seasonal energy efficiency ratio)
 - Rated efficiency (ref. EfficUnit) – Efficiency or performance rating value for the Rated efficiency unit basis.
 - Quantity per sales transaction, project, or site – Total units of incentivized equipment located at the site or project.



NORMALIZED METER ENERGY CONSUMPTION (NMEC)

K12 Public Schools Program
(K12PSP)

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8. Normalized Metered Energy Consumption (NMEC):

Normalized Metered Energy Consumption is not part of this program. Only Deemed measures will be evaluated.