

Appendix A : Implementation Plan Template (2.0)

The following Implementation Plan is located on the CPUC-maintained website, the California Energy Data and Reporting System (“CEDARS”)¹, in accordance with applicable CPUC decisions and Energy Division guidance.

Program Overview

The Southern California Gas Company Comprehensive Manufactured Homes Program (CMHP) is a residential direct install and comprehensive energy efficiency program that serves the manufactured housing market segment.

Program Budget and Savings

1. Program and/or Sub-Program Name

Comprehensive Manufactured Housing Program

2. Program / Sub-Program

ID SCG3884

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

- a. Program / Sub-program Budget Table
- b. Program / Sub-program Gross Impacts Table
- c. Program / Sub-Program Cost Effectiveness (“TRC”)
- d. Program / Sub-Program Cost Effectiveness (“PAC”)
- e. Type of Program / Sub-Program Implementer (PA-delivered, third party-delivered or Partnership)
- f. Market Sector(s)
- g. Program / Sub-program Type
- h. Market channel(s) Downstream and Intervention Strategies

Implementation Plan Narrative

1. Program Description:

The Southern California Gas Company Comprehensive Manufactured Homes Program (CMHP) is a comprehensive advanced clean energy solution for manufactured home customers. The program path begins with the delivery of cost-effective therm-rich direct install measures that transitions to an advanced clean energy opportunity for the manufactured homes customers that can be financed by outside sources. The

¹ California Energy Data and Reporting System (CEDARS), <https://cedars.sound-data.com/>

Comprehensive Manufactured Homes Program delivers natural gas energy efficiency, clean energy, and carbon emission solutions.

2. Program Delivery and Customer Services:

The CMHP program will deliver the program and customer services following the 3- step process outlined below:

Step 1: In accordance with SB 535, the program targets disadvantaged communities throughout SoCalGas's service territory. The SB 535 mapping tool found on the OEHHA CalEnviro Screen website is used to identify the disadvantaged communities for program outreach and education. A program outreach utilizes an iPad to geofence the disadvantaged communities and focuses on manufactured housing residences face to face, by phone, or email to set-up a meeting to share the program in person or via webinar. Manufactured housing marketing lists are created to prepare for strategic outreach efforts that include the distribution of flyers, and door hangers by program energy specialists. Disadvantaged communities (DAC) are identified for DAC outreach intensification.

Step 2: Manufactured housing residents are presented SoCalGas ESA information and if eligible, are enrolled virtually or in-person in ESA by the ESA certified program implementer at the time of CMHP direct installation enrollment.

Step 3: Manufactured housing residents are enrolled virtually or in-person in CMHP and scheduled directly by the Energy Specialist for the installation visit with a program installer. During the installation visit, participants are asked if they rent or own their home and if they speak English as a second language to identify if they are hard-to-reach. The customer's HTR status is indicated on the installation form.

The timing of each program delivery component is as follows:

Days 1-3: Program leads begin with Synergy intelligent outreach, SoCalGas utility referrals, or inbound calls and web inquiries to Synergy from interested residential account owners or operators. An appointment is scheduled to qualify the site, plan the project, enroll the customer in the program, and schedule the DI services.

Days 4-7: The DI services are installed, and an invitation is extended to the property for a walkthrough audit and sales consultation.

Days 8-30: Invoice, deemed savings, and inspections of DI services are performed, and information is uploaded into SoCalGas's system. The residential property receives the walkthrough audit and sales consultation. Customer incentives for clean tech products are provided by local agencies such as SCAQMD if these are sold to the customer. The customer applies for clean energy project and advanced energy efficiency financing through REEL, Greensky, or EGIA. Clean energy projects and advanced energy efficiency measures are installed by Synergy.

Days 31+: Progress to deep retrofits continues as clean advanced energy efficiency technologies are installed. Quarterly clean advanced clean energy program reports are uploaded into SoCalGas’s system.

3. Program Design and Best Practices:

The SoCalGas CMHP program marketing strategies play an essential role in the program design and best practices. These are outlined in Table 3(a).

Table 3(a)

Marketing Strategies	
Marketing Strategies	How it Will Increase Participation
1. Intelligent direct outreach with SoCalGas approved flyers and door hangers.	Synergy has a database of all manufactured housing parks in SoCalGas’s service territory organized by California Climate Zone and DAC eligibility. Outreach are assigned territory based upon climate zone, DAC, and energy savings goals. Program outreach use iPads with manufactured housing park maps that indicate which program measures are eligible by space number increasing the enrollment productivity of the outreach. The program flyers and door hangers provide program credibility to the customer while in the field.
2. Synergy manufactured home liaisons will work with community managers and owners to gain access to marketing within the community.	The manufactured home liaisons get approval from management to do outreach in the manufactured home park (MHP) so that program participation in the MHP can begin. They also set-up clubhouse presentations which draw large crowds to learn about the program and enroll in the program. The liaisons strategically place the program in the mobile home park’s social media channels that are available.
3. Program eligibility is drilled down to the manufactured housing space number is displayed on outreach iPads to know which homes are available for participation.	The Synergy developed manufactured housing canvassing tool increases participation by knowing beforehand which MHP spaces to target boosting outreach efficiency.
4. Email and Phone Campaigns for virtual enrollment and appointment scheduling to past customers offering the new generation of program measures are deployed.	Past customers trust the program and Synergy and are more responsive than new customers. Through email and phone campaigns these customers are invited to participate in the new program offerings increasing program participation.
5. Program signs are placed near the entrance and exit of the manufactured housing community to indicate program availability with the phone # for calling/texting and website for enrollment.	MHP residents are receptive to approved messaging at the entrance and exits of their community. Strategic placement of signs with a call to action in these locations increases participation.
6. Local Government Partnership collaboration leads to local city	Endorsement and marketing by city officials increase program credibility and awareness increasing program participation.

Marketing Strategies	
endorsement and marketing of the program.	

Pooled Skills and Certifications

1. BPI Certified
 - Energy Advisor Credential

2. Synergy University Energy Efficiency Training
 - Cutting Edge and Specific to PDI

3. Outside Sales Courses
 - Selling Energy by Mark Jewell
 - Multilingual
 - Spanish, Vietnamese, German

Technical Assistance

A directory of areas of technical assistance and description of each are provided in Table 3(b).

Table 3(b)

Areas of Technical Assistance	Description
Warranty Coverage	No-hassle 1-year warranty on labor and 3-year warranty on material to be free from manufacturer defects.
Conditions that may Void Coverage	The Synergy warranty inspector reviews all seemingly unreasonable claims and makes a judgment on a case-by-case basis.
Retrieval of Damaged and/or Defective Merchandise	Synergy retrieves all damaged and defective merchandise from the premises where installed. This is not the customer's responsibility.
Effective Date of Warranty	Date of installation
Warranty Period Tracking	Customer installation dates are recorded and accessible to customer service technicians through the Synergy Database for reference.
Manufacturer Unit Tracking	Bill of sale or bill of lading for each Synergy order is used for manufacturer unit tracking.
Normal Business Hours for Warranty Calls and Service	Monday - Friday 8AM - 5PM Emergency: Monday – Sunday 24 Hours
Contact Information for Warranty Questions and Service	Phone: 800-818-4298 Web: www.synergycompanies.org
Warranty Process	Program customer reaches Synergy's Technical Service Department through phone or web inquiry. The Technical Service Department representative retrieves the customer's information in the Synergy database. An

	appointment is scheduled for warranty service as soon as possible with an assigned Synergy technician in the field. Each record in the Synergy database is assigned a specific program. This feature allows for differentiation between programs facilitating faster customer service, program specific reports, and invoicing.
The Typical Response Time for Warranty Calls and Service for Measures that are not Operational or not Functioning Properly	No matter how big or how small the warranty call or service required, Synergy resolves all issues as soon as possible. Most issues are resolved the same day or 24 hours after reported. Non-emergency weekend calls are handled the first business day following the weekend. Synergy holidays are New Year's Day, Memorial Day, 4 th of July, Labor Day, Thanksgiving Day, and Christmas Day. During holidays, only the emergency service calls are attended to. The message for emergency service responds on all the telephone lines after hours, weekends, and holidays.
The Determining Factors for Repairing or Replacing Defective Equipment	The number one factor is customer satisfaction. Synergy aims to make customers happy. The second factor is the warranty period.
Who will Make the Necessary Service Repairs or Replacement?	Synergy Quality Production Managers who specialize in the quality and productivity of Synergy technicians. The original technician who performed the work may also be assigned for the warranty service call depending on the nature of the service call.
Available locations for pick-up of replacement parts for defective equipment	1325 N Red Gum St, Anaheim, CA 92806 5670 E. Clinton Avenue, Fresno, CA 93727 90 Business Park Drive, Perris, CA 92571
How will the warranty coverage and process be managed after the contract ends?	Synergy will continue to stand behind products and services installed after the contract ends for the duration of the warranty period of each customer.

Customer Incentives.

The program offers no-cost direct installation measures as well as rebate incentives for comprehensive measures that require customer co-payment.

Direct Install.

Contractor will directly install energy savings measures after in-field energy assessments.

Financing.

Residential manufactured housing customers may acquire their own financing through their lending institution of choice or through Green Sky, EGIA, or REEL.

4. Innovation:

Table 4(a)

Program Innovation		
Innovative Aspects	Analysis of Impact on Savings and Participation	Metrics to Track Progress
1. CMHP is the Pathway to Natural Gas Advanced Clean Energy Technology Installations.	The direct install measures awaken a desire for participants to be more energy efficient and build trust in Synergy as the installer. 10% of the direct install participants will receive advanced clean energy technologies (high efficiency furnaces and water heaters).	A key performance indicator (KPI) is established to track and report progress monthly.
2. CMHP is the Water Energy Nexus Platform for Manufactured Housing.	Combining natural gas, electricity, and water energy savings measures in one single delivery is enticing to program participants because of the increased comprehensiveness. The more comprehensive offering drives increased program participation.	A Water Energy Nexus report is included with the annual report submitted to SoCalGas.
3. CMHP Drives SoCalGas ESAP Referral and Enrollment.	Offering the SoCalGas ESAP weatherization program with CMHP increases comprehensiveness and program participation for SoCalGas ESAP and CMHP. Overlapping measure offerings are reserved for SoCalGas ESAP and the others are installed on CMHP.	SoCalGas ESAP enrollments and installations are reported through the SoCalGas HEAT system daily.
4. CMHP has cost sharing and leveraging opportunities with Synergy's network of electric and water agencies.	Synergy's network of electric and water agencies affords SoCalGas the opportunity to share measures costs for HVAC measures that provide both natural gas and electric savings (smart thermostats and duct seals). The same opportunity exists for water heating measures that provide both natural gas and water savings (thermostatic valves, showerheads, and aerators). Program measure cost sharing increases the cost-effectiveness of the program by increasing the number of measures installed for the same contract value driving up the TRC and PAC.	The program's measure mix is revised and amended to the contract to include measures offerings when combined with electric and/or water agencies.

5. Metrics:

#	KPI	SoCalGas Metric	KPI Definition
1	First Year Energy Savings Delivered	Energy Savings	To date % achieved of energy savings goal compared to planned goal, split on an even pro rata basis
2	Lifecycle Energy Savings Delivered	Energy Savings	To date % achieved of lifecycle energy savings goal split on an even pro rata basis
3	Cost Effectiveness Alignment	Cost Effectiveness	Actual TRC Ratio compared to Pre-Program Approved TRC (1.18) Alignment split on an even pro rata basis
4	Diverse Business Enterprise Spend**	N/A	To date % DBE spend compared to DBE commitment (42%) split on an even pro rata basis
5	Conversion to Comprehensive Energy Efficiency Projects	Participation Relative to Eligible Population for MH sector	To date % of comprehensive EE Projects compared to total estimated cumulative Comprehensive EE projects delivered. Target is 15% of total projects.
6	DAC and HTR	Participation of DAC and HTR customers relative to total customers	To date % of participants who are HTR and DAC compared to Goal. Target is 60% HTR customers, and 60% DAC customers.
7	Levelized PAC Cost	Cost Per Unit Saved	Actual /Forecasted (1.7)levelized PAC cost
8	Program Administration and Implementation	N/A	Based on Contractor's reporting/data quality, timeliness, invoicing issues, meeting expectations

6. For Programs claiming to-code savings:

The Comprehensive Manufactured Home Program claims savings above code standards.

7. Pilots:

The Comprehensive Manufactured Housing Program has no pilots planned; however, it is open to pilots in the future and the implementation plan would be updated accordingly.

8. Workforce Education and Training:²

The workforce assigned to the Comprehensive Manufactured Housing Program will be enrolled in education and training courses held by SoCalGas virtually or at the Energy

² D.18-05-041, page 20-21 and Ordering Paragraph 7

Resource Center. The program will expand/initiate partnerships with entities that do job training and placement.

CMHP follows the first source hiring requirement that mandates employers to utilize good faith efforts toward employing economically disadvantaged residents for entry-level positions on program projects. These candidates self-certify their economic status during the job application process.

9. Workforce Standards:

Implementation of the Comprehensive Manufactured Housing Program requires a CSLB license with B – General, C2 – Insulation, C10 – Electrical, C17 – Glazing, C20 – HVAC, C22 - Asbestos, and C36 – Plumbing certifications to implement the program’s scope. The program also requires that the implementer carry at least a B grade with ISNET world.

State law and the Contractors State License Board require all Bidders and their subcontractors to hold valid contractor's licenses prior to submitting an abstract or a proposal for work that is subject to license requirements (California Business and Profession Code, Sections 7026, 7027.1, and 7028(a)). The implementer complies fully with these requirements holding all the licenses necessary to perform the quality installation of all direct install and advanced energy efficiency technologies.

10. Disadvantaged Worker Plan:³

The program supports job access for disadvantaged workers by interviewing individuals in the circumstance defined as a "disadvantaged worker" and providing an equal employment opportunity for the position desired. The implementer currently employs workers that meet these criteria.

The program provides disadvantaged workers with administrative, marketing, and technician opportunities in the day to day operation of the program. These positions include scheduling, application processing, outreach, sales, and installation tasks. With the passage of time and performance reviews, the program provides management and executive level opportunities to disadvantaged workers.

The implementer will utilize its Human Resources software to track the progress of all employees/interviewees and will utilize the software to track hired disadvantaged workers. This data will be reported to SoCalGas on an annual basis.

11. Additional information:

No additional information.

[Supporting Documents](#)

³ D.18-10-008, Attachment B, Section D, page B-9.

1. **Program Manuals and Program Rules:**

See Below

2. **Program Theory⁴ and Program Logic Model:⁵**

Introduction

Manufactured housing ratepayers have goals and plans to be more energy efficient and even invest in comprehensive energy efficiency, however with so many choices and options it is difficult to decide the best path forward. The Comprehensive Manufactured Housing Program is the place for manufactured housing ratepayers to begin their comprehensive energy efficiency journey. CMHP provides interested manufactured housing customers complimentary walkthrough audits, no cost direct install energy efficiency technologies, SoCalGas Energy Savings Assistance Program enrollment, and comprehensive energy efficiency technologies that can be financed.

How the Offering Works

The path to comprehensive energy efficiency begins by scheduling an appointment for the installation of no cost approved HVAC and water heating technologies that excite program participants about saving energy and comprehensive energy efficiency. During or at the conclusion of the no cost energy efficiency measures installation appointment, the program participants are invited to participate in a complimentary walkthrough audit and sales consultation to identify opportunities for even greater energy efficiency savings and comfort that can be financed. The audit findings are reviewed with the manufactured housing resident to develop a comprehensive energy efficiency roadmap and determine the next steps.

Enrollment

CMHP is available to manufactured housing customers that have an active SoCalGas master metered or individually metered account. Customers are not eligible to receive a rebate for the same measure(s) prior to EUL or RUL of the equipment.

Marketing Plan

The purpose of the SoCalGas Comprehensive Manufactured Housing Program marketing plan is to overcome market barriers and take manufactured housing customers down the

⁴ The expected causal relationships between program goals and program activities in a way that allows the reader to understand why the proposed program activities are expected to result in the accomplishment of the program goals. A well-developed program theory can (and should) also describe the barriers that will be overcome in order to accomplish the goals and clearly describe how the program activities are expected to overcome those barriers. California Evaluation Framework, June 2004.

⁵ The graphical representation of the program theory showing the flow between activities, their outputs, and subsequent short-term, intermediate, and long-term outcomes. California Evaluation Framework, June 2004.

path of comprehensive energy efficiency all while delivering a cost-effective direct install resource program.

Table 2(a) - Market Barriers and Strategies		
#	Barrier	Strategy
1	Deep holistic, and quality whole home retrofits have high costs relative to expected energy savings.	Cost-effective direct install measures awake an interest in low-cost advanced clean energy technology improvements that then awake an interest in full cost advanced clean technology. Financing with specific terms to have the finance fees offset by the energy savings are provided for advanced clean technology. The financing is provided through residential energy efficiency loans such as REEL or on-bill financing (OBF).
2	Need for engagement tools to drive continuous customer behavior, persistence, and program participation.	During the direct install installation visit, customers are invited and enrolled in SoCalGas My Account and Ways to Save on-line platforms. These on-line platforms engage the customer and facilitate building a long-term relationship with SoCalGas. Customers are also invited to get on the pathway to advanced clean technology by participating in a complimentary walkthrough audit and sales consultation.

Marketing Materials

Door hangers are the primary printed marketing piece containing program information and the SoCalGas logo lending credence to the effort. The door hanger features information about comprehensive energy efficiency with direct install information enrollment information.

Table 3(b) Promotional and Marketing Materials		
Description	Annual Quantity	Method of Distribution
Program Flyers	30,000	Outreach delivery and mail.
Program Door Hangers	30,000	Outreach delivery
Program Signs	25	MHP Liaison Set-up

The SoCalGas Comprehensive Manufactured Housing program web page has the program’s vision, images that support the door hanger in the field, advanced clean energy offerings, and direct install measure specifications.

Hard-to-Reach Effectiveness

Synergy will focus on hard-to-reach (HTR) customers that follow the guidance provided in section 2.5.2 of D.18-05-041. HTR opportunities are found in greatest abundance within the Central Valley and the Inland Empire where HTR renting and income criteria can be met. The IE and Central Valley also contain some of the highest levels of air pollution in the SoCalGas service territory resulting in these areas being disadvantaged community rich. The IE and Central Valley also are good climate zones for energy savings (CZ 10 and CZ 13).

Disadvantaged Communities Effectiveness

In accordance with SB 535, the program targets disadvantaged communities throughout SoCalGas's service territory. The SB 535 mapping tool found on the OEHHA CalEnviro Screen website is used to identify the disadvantaged communities for program outreach and education. Program energy specialists utilizes an iPad to geo-map the disadvantaged communities and targets the home face to face, by phone, or email to explain the benefits of energy efficiency, advanced clean energy, and enrollment in CMHP.

Approaches to Energy Efficient Buildings

The approaches to energy efficient buildings consist of Direct Install, Walkthrough Audits, and Comprehensive Energy Efficiency. The tailored approach also plays an important role for future measure development and energy savings preservation to achieve energy efficient buildings.

Direct Install

All program participants enter the pathway to advanced clean energy through the direct install channel. The no cost direct install technologies include approved HVAC and water heating technologies.

Comprehensive Energy Efficiency

Comprehensive HVAC and water heating technologies that are ENERGY STAR® certified are installed following applicable workforce standards, local, and state regulations and guidelines.

Workpaper Development and Workpaper Updates

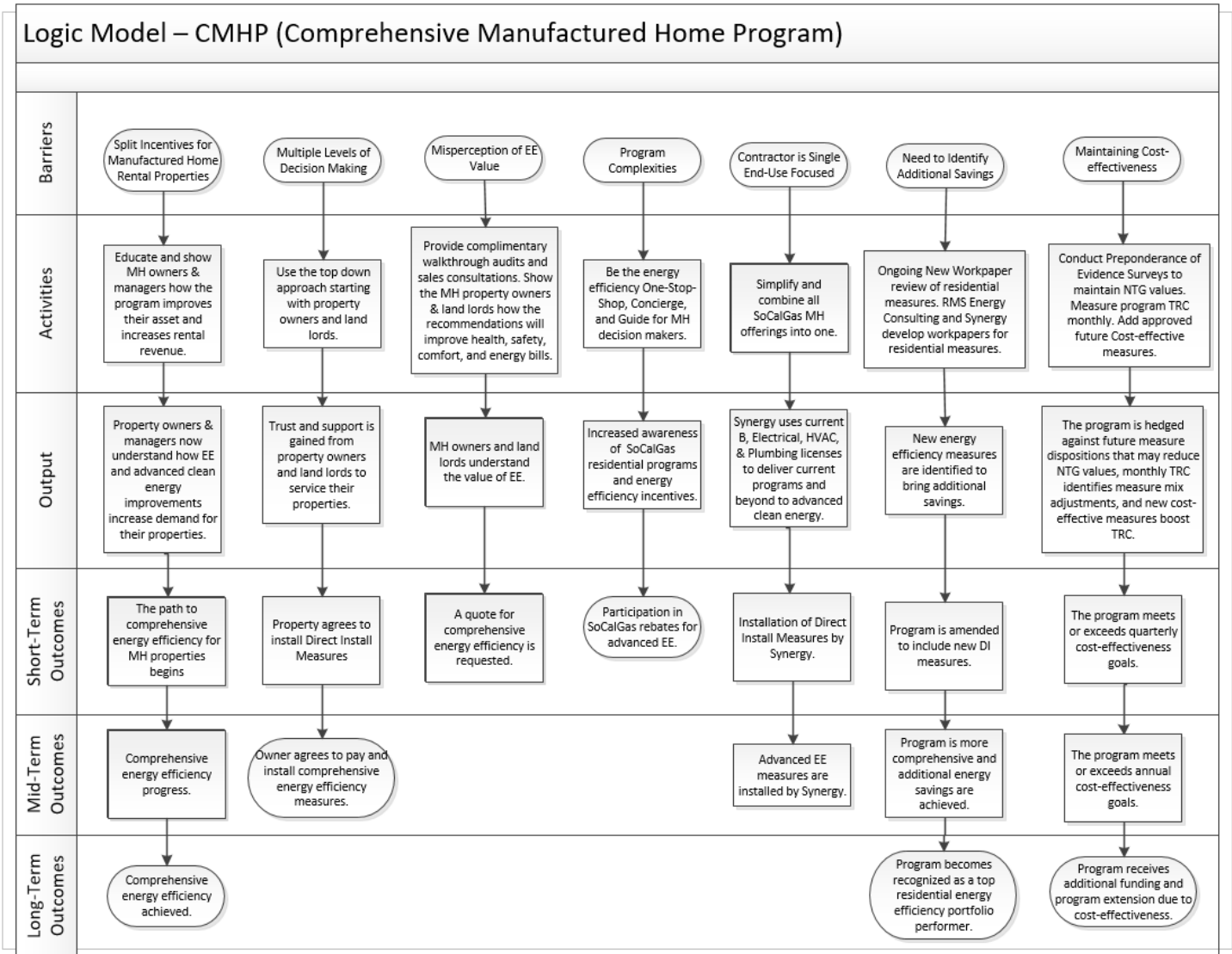
Workpaper development and workpaper updates to future existing measures are part of the program design to introduce new technologies to the program in the future and potentially increase energy savings of existing program measures.

Workpaper development begins when a new measure is identified as potentially having high energy savings. These opportunities are identified as equipment suppliers share their latest technologies that do not have workpapers and as the program walkthrough audits identify areas of manufactured housing that could benefit from an energy efficiency solution that currently does not have a workpaper.

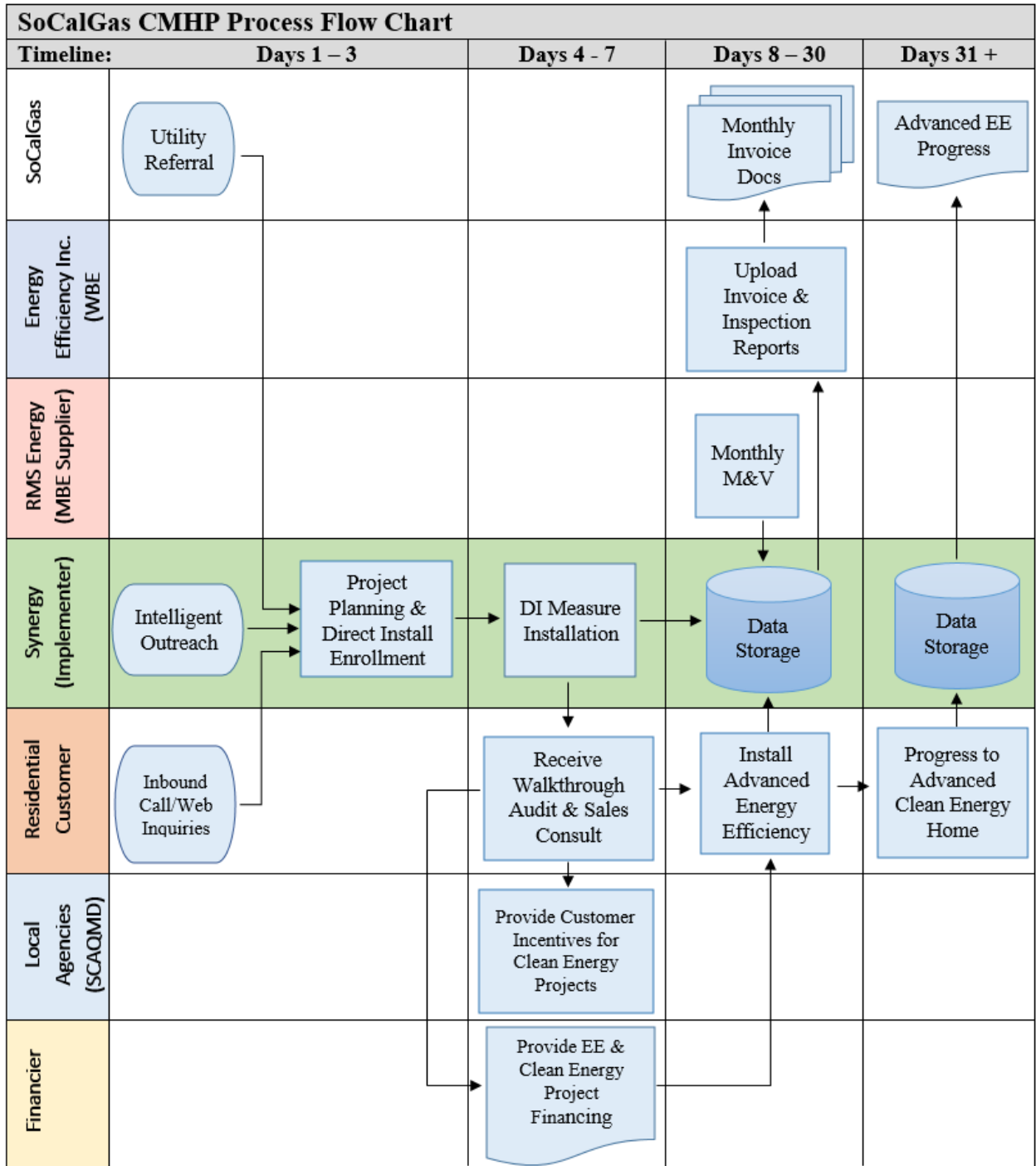
Workpaper updates are identified when existing values do not appear to be consistent with field application. For example, when the effective useful life or installation rate of a measure appears to be much lower than what is actually taking place in the field, a field study is

performed to revise these values to better reflect what is taking place during measure implementation.

Program Logic Model



3. Process Flow Chart:



Explanation

The SoCalGas CMHP Process Flow Chart illustrates the timeline, activities, and roles of the seven program actors (SoCalGas, Synergy, Energy Efficiency, RMS Energy, Residential Customer, Local Agencies, and Financier).

Days 1-3: Program leads begin with Synergy intelligent outreach, SoCalGas utility referrals, or inbound calls and web inquiries to Synergy from interested residential account owners or operators. An appointment is scheduled to qualify the site, plan the project, enroll the customer in the program, and schedule the DI services.

Days 4-7: The DI services are installed, and an invitation is extended to the property for a walkthrough audit and sales consultation.

Days 8-30: Invoice, deemed savings, and inspections of DI services are performed, and information is uploaded into SoCalGas's system. The residential property receives the walkthrough audit and sales consultation. Customer incentives for clean tech products are provided by local agencies such as SCAQMD if these are sold to the customer. The customer applies for clean energy project and advanced energy efficiency financing through REEL, Greensky, or EGIA. Clean energy projects and advanced energy efficiency measures are installed by Synergy.

Days 31+: Progress to deep retrofits continues as clean advanced energy efficiency technologies are installed. Quarterly clean advanced clean energy program reports are uploaded into SoCalGas's system.

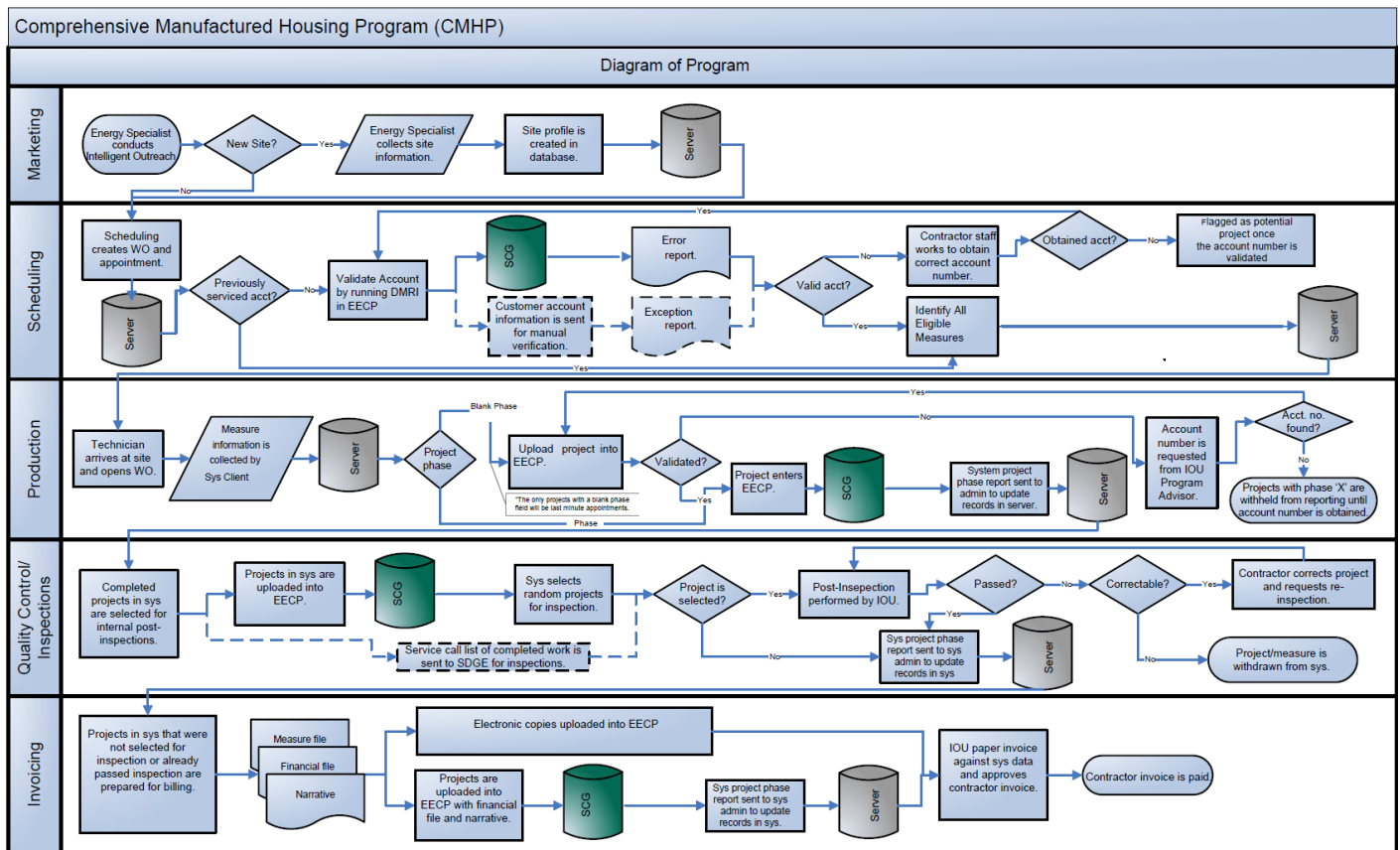
4. Incentive Tables, Workpapers, Software Tools:

Measure Description	Delivery Type	Payment Unit	Saving Unit	Workpaper
Duct Test and Seal	No-Cost Direct Install	Cap-Tons	kWh, kW and/or Therm per unit	SWSV001-02
Tubspout Diverter Valve with Thermostatic Showerhead	No-Cost Direct Install	Each	kWh, kW and/or Therm per unit	SWWH023-01
Low Flow Showerhead, 1.5 gpm	No-Cost Direct Install	Each	kWh, kW and/or Therm per unit	SWWH002-02
Faucet Aerator, Kitchen Sink, 1.5 gpm	No-Cost Direct Install	Each	kWh, kW and/or Therm per unit	SWWH001-02
Faucet Aerator, Bathroom Sink, 0.5 gpm	No-Cost Direct Install	Each	kWh, kW and/or Therm per unit	SWWH001-02
Faucet Aerator, Bathroom Sink, 1.0 gpm	No-Cost Direct Install	Each	kWh, kW and/or Therm per unit	SWWH001-02
Thermostatic Shower Valve	No-Cost Direct Install	Each	kWh, kW and/or Therm per unit	SWWH003-01
Residential Smart (Communicating) Thermostat	No-Cost Direct Install	Household	kWh, kW and/or Therm per unit	SWHC039-03
Pipe Wrap, Residential Outdoor	No-Cost Direct Install	Each	kWh, kW and/or Therm per unit	SWHC031-01
High Efficiency Furnace, Residential, AFUE 95%-VSM	Co-pay Direct Install	Household	kWh, kW and/or Therm per unit	SWWH019-02
Efficient water heater: 40 gallon gas water heater (UEF=0.68) replaces 40 gallon standard gas water heater	Co-pay Direct Install	Each	kWh, kW and/or Therm per unit	SWWH012-02
Tankless Water Heater, Residential	Co-pay Direct Install	Each	kWh, kW and/or Therm per unit	SWWH013-02
Water Heater Controller	Workpaper Development	Therm	Therm per unit	Workpaper Development

Total terms Energy Savings (Annual Net/ Program Net)	Please refer to CEDARS for this information.
Hard-to-Reach (HTR) or Disadvantaged community (DAC) Customers.	Sites – 1,198 projects
Forecasted Number of Customers Served by Program Year	2021 – 5,666 2022 – 5,667 2023 – 5,667
Area(s) Served (including service territory, climate zones, cities, and/or counties, as applicable)	Climate Zones: 4,5,6,8,9,10,13,14,15 & 16

5. Quantitative Program Targets:

6. Diagram of Program:



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

DEEMED Measure Recording and Verification

The DEEMED measure savings for each approved program measure is inputted into the SoCalGas reporting system and the implementer reviews it for accuracy. As part of the monthly reporting and invoicing process, customer measure installation data is inputted into the SoCalGas reporting system and the project specific DEEMED savings are calculated for each project. In the event that reported quantities vary from inspected quantities, the correct quantities are reported to the SoCalGas Company and invoice adjustments are made.

SoCalGas EM&V supports the program implementer to ensure that DEEMED measures are being implemented in the field following the workpaper guidance. SoCalGas EM&V also notifies the implementer of DEEMED workpaper updates that need to be implemented.

The CMHP SoCalGas program advisor will coordinate with the implementer and with SoCalGas Policy in order to report DEEMED savings for evaluation studies and data requests.

8. Normalized Metered Energy Consumption (NMEC):

No NMEC information is applicable to this program.

Program Manuals

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 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	Criteria – Workpaper Reference
Duct Test and Seal	SWSV001-02
Tubspout Diverter Valve with Thermostatic Showerhead	SWWH023-01
Low Flow Showerhead, 1.5 gpm	SWWH002-02
Faucet Aerator, Kitchen Sink, 1.5 gpm	SWWH001-02
Faucet Aerator, Bathroom Sink, 0.5 gpm	SWWH001-02
Faucet Aerator, Bathroom Sink, 1.0 gpm	SWWH001-02
Thermostatic Shower Valve	SWWH003-01
Residential Smart (Communicating) Thermostat	SWHC039-03
Pipe Wrap, Residential Outdoor	SWHC031-01

High Efficiency Furnace, Residential, AFUE 95%-VSM	SWWH019-02
Efficient water heater: 40 gallon gas water heater (UEF=0.68) replaces 40 gallon standard gas water heater	SWWH012-02
Water Heater Controller	Workpaper Development

2. Customer Eligibility Requirements:

CMHP is available to SoCalGas ratepayers that reside manufactured homes. To be eligible for services, the end user must be in Company’s Service Territory with an active Company account. In addition, the end user may not have received an incentive for the same measure from Company in previous five years.

3. Contractor Eligibility Requirements:

All contractors that work in the service territory and offer the eligible program measures are eligible to participate in the program. Customer eligibility will still apply.

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

Open network program.

5. Additional Services:

Not applicable to this program.

6. Audits:

During the direct install visit, the program participants are offered an ASHRAE Level 1 walk-through audit and sales consultation for the same day or a later date performed by a CMHP energy advisor. The audit reveals advanced HVAC and water heating opportunities that can be financed for the customer. When these opportunities are presented to the decision maker, a timeline, roadmap, and next steps are established.

7. Sub-Program Quality Assurance Provisions:

The quality assurance plan puts emphasis on upfront training to prevent issues in quality before they happen. Field technicians are provided with quality measure installation training to ensure measures are installed to the customers’ satisfaction and provide safe, clean, reliable energy savings.

Every two weeks, Synergy managers hold on-site trainings with Synergy energy specialists and installers at the company facilities and review industry changes/trends. These changes and trends are also emailed and communicated between program specific training sessions. Each position has a checklist of skills and knowledge to master. Synergy employs a full-time safety and compliance director that reviews and directs compliance with applicable laws and regulations.

The full-time quality production managers (QPM) actively resolve customer questions and concerns regarding workmanship and warranty. The QPMs also ensure that measures are installed properly and perform as they should while doing a physical inspection of the work. These managers focus on maintaining an overall pass rate of 95% on all measures and services inspected. Synergy uses the Synergy Tech System® to capture measure installation data in the field securely and electronically transfer the data for invoicing and energy savings reporting.

Failed inspections and customer satisfaction surveys are reported monthly with the invoicing reports to SoCalGas. Measures that fail inspection are credited back to the program's budget and customer complaints are resolved in a timely manner.

Expectations of employees

Employees are expected to follow guidelines outlined in the Sempra Energy Supplier Code of Conduct.

Inspections

To ensure high production quality and customer satisfaction, QPM physically inspect a minimum of 10% of all jobs completed on the program. The percentage inspected is sufficient to identify positive and negative trends in installation quality and customer satisfaction.

The implementer's inspection tool assists managers by summarizing inspection results by installer to see which installers needs to be addressed or given additional training. The inspection tool also creates a checklist for each enrollment to verify that the measures and quantities were installed and reported correctly. The installers' workorder sheets are also inspected to make sure they are filled out completely and correctly.

Tools and Activities

The Synergy Tech System (STS) is the field data capture tool that will be used to capture direct install and comprehensive energy efficiency installation data. Customer authorization and work order forms and the ASHRAE Level 1 audit forms will be hosted electronically in Fluix. iPads are used to run the Synergy tech system and Fluix applications in the field.

Customer signatures are captured electronically in STS and Fluix. Data from the ASHRAE Level 1 audit forms are converted into pdfs and emailed to the customer. The data is also compiled in a database to study the manufactured housing sector energy efficiency needs and follow-up with the customer on comprehensive energy efficiency opportunities.

8. Other Program Metrics:

None.