EE Incentive Process: Roles, Process, and Sample Project

Jonathan Rossi, PE
Program Manager,
C&I Programs
TRC Solutions
Energy Efficiency Program Flow

CA Public Utilities Commission (CPUC)

PPP funds directed to LA County for REN

Utilities, SCE & SoCal Gas

Ratepayers pay utilities

Incentives

LA County (LAC) Administers REN

SoCal Regional Energy Network (REN) Customer programs, Govt programs

The Energy Coalition (TEC) Hired by LAC to implement REN

Consultants Hired by TEC to provide technical assistance

City Implements projects

Utility Customers

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Utility Customers
Successful Influence Includes

- Effective Communication
- Building Trust
- Understanding the Audience
- Demonstrating Competence
- Being Accessible

Examples of Successful Influence:

- Efficacious leadership
- Persuasive arguments
- Compelling presentations
- Insightful insights
- Resonant rhetoric

Southern California
Regional Energy Network
EE Sample Project, Pool Pump VFD

- **Customer Engagement/Audit:** Maintain written email records of meetings and audit findings. This will become the backbone for influence.
- A benchmarking effort reveals that a public pool facility has a high energy intensity for gas and electricity.

Identification!
Financial Assistance!
EE Sample Project, Pool Pump VFD

- **Customer Acceptance/PFS Development:** Based on the audit findings, the Customer requests that the project proceed and would like to see what incentives can be secured!

  **PFS Development:**
  - In-depth calculations (M&V)
  - Package influence documentation
  - Economic analysis

  **Technical Assistance!**
EE Sample Project, Pool Pump VFD

- **Early Screening Document**: Projects need to have ESD approval before the application and supporting documentation can be submitted!

- **Submit Incentive Application**: After receiving ESD approval, move forward with submitting full package through online application tool.
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- **Technical Review and Approval**: Respond to any 3rd Party Technical Reviewer questions. Review may include an inspection.

  The goal of technical review is to confirm the savings claim. Questions are normal, all custom projects are different.

- **Project Approval Letter**: Once project approval letter is received, project can proceed to scope of work development and city procurement, as needed.
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• **Procurement and Construction:** Once project is installed and successfully commissioned, the contractor (or whoever completes the work) must provide a detailed invoice.

![Sample Invoice](image)
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- **Installation Report (IR) and Installation Tech Review:** Package the installation files, with a focus on invoice, and submit IR package. May also include post-case M&V. Finally, the project goes through installation tech review.
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- **Incentive and/or Finance Check:** Incentives and any finance checks are sent to the customer/trade-pro based on the final confirmed project savings.
Supporting Documents for Custom Projects

- MS®+B1®N, E'u-BëZ
- M+1™: E'ë ŽëN= BëN= âëB-ù-a, 'Y' BëK '1+
- Jë', Eë', E'ë Ë+ ËŽëBëNë'ëNë'ëBëNë'ëNë'
- EŽëAë'+EëE '1+EëC '1+EëC '1+B1®N'+EëE '1+B1®N'='EëE'
- 'u=ŽëN®'
- EŽëMëE '1+EëA, BuëC '1+
- JëS-ú=a, 'N®'a=ŽëN®; Ë
- Ë=ú'=Bësâë