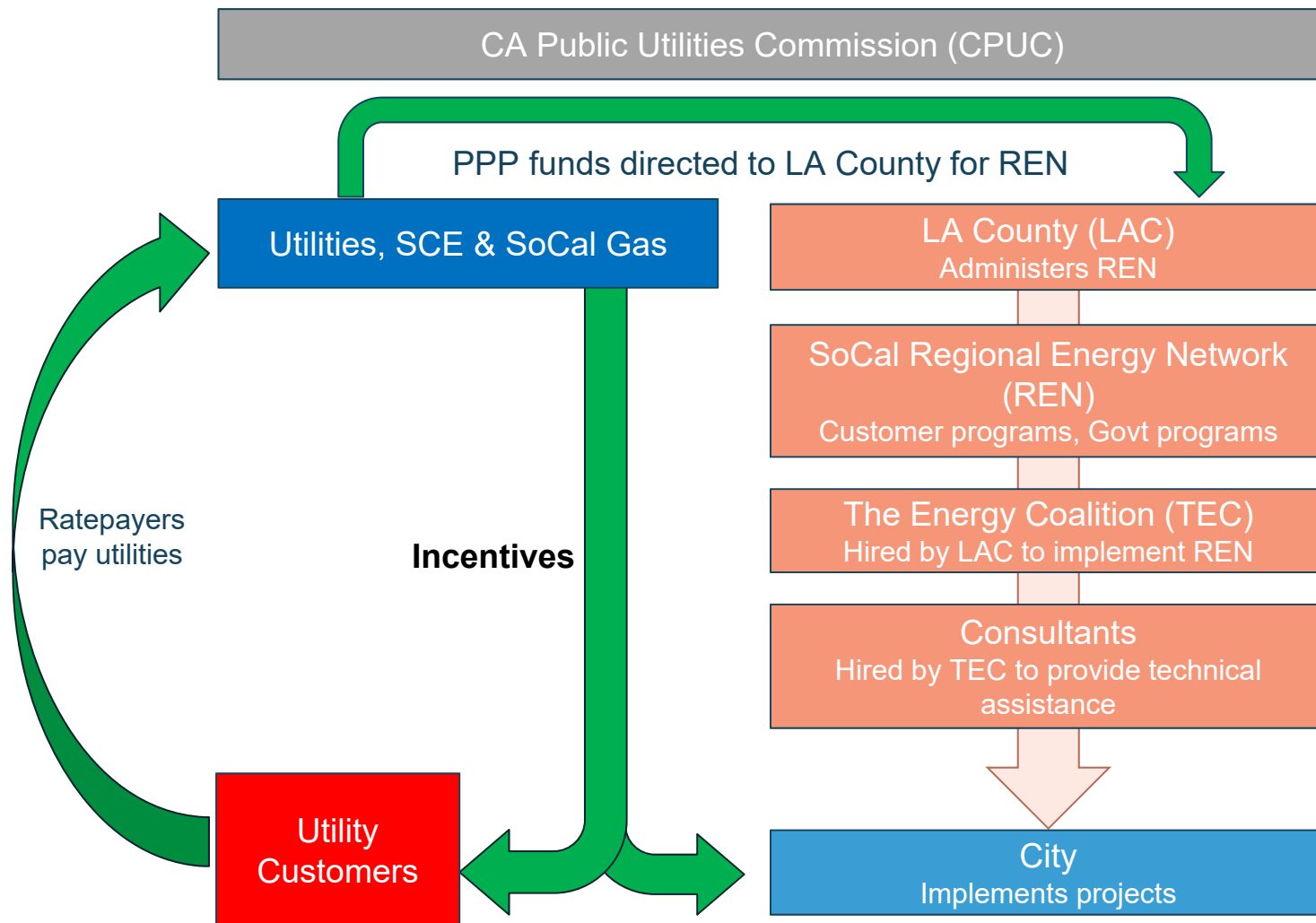


EE Incentive Process: Roles, Process, and Sample Project



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

Energy Efficiency Program Flow



Influence and Influence Job Aid

O' 'a1, z' '1u' a3l a' ; a' N a' a' Y' i% a' ; suz' e' '1- a' 1; a' M' ' a' u' B1+ i' z' ' a' B a' l' a' z' ; ^+ ; i' a' 2' e' B ; u' ^ a' z' a' B1 a' l' a' N a' ' ' ; ' ; a' l' ^ N' N' i

O' ' a' u' e' : ' e' ^ a' B1 a' : ' a' B l a' ; a' e' a' a' u' B' a' u' + B1 a' B, a' u' B' e' e' N' N' B1 a' N' ^, a' ; suz' e' '1- N a' 1; a' M' - a' i' + ' e' u' ^ a' ; suz' e' '1- N a' ^ a' ; N u' z' N a' i, z' '1u' a' 1; O' B e' a' e' 1/2 B1 ; ' e' '1u' a' B, a' Y' ; '1u' a' N a' ' , '1 ; a' l' z a' : ' a' 1' e' z a' , Y' N' B1 a' 1; a' : ' M' : ^+ ' T' M' ; ' a' W' B e' a' i% a' e' s' z' 1/2 a' 1; a' ^ Y' a' l' ' '1 a' 1/2 e' B Y' ; a' e' s' z' : ' a' a' u' B' a' l' B e' + B1 a' l' ' T' M' ' '1 a' M' - a' i' z' l' a' u' a' M' u' + B e' a' u' e' +1' e' N' 1/2 N e' j a

O' ' e' ; a' u' e' z a' 1; a' ^ u' z' ^+ ; a' r' z' N' + B e' u' ; a' 1; a' l' B O' l' * ^ a' 2' e' B e' e' e' N' i

- O' ' N' a' u' B' a' l' B e' + Y' a' e' s' z' 1/2 N e' | z' e' ; a' : ^ a' N' N' e' + B1 N a' B, a' e' s' e' e' e' a' i, z' '1u' a' l' a' l' u' e' ; a' z' a' M' : ^+ a' z' 1/2 B e' + i% a' ; suz' e' '1- + B1 a' : ^ a' u' a' e' z a' ' e' B1 N' e' + N a' : a' e' 1/2 a' e' '1- e' N a' 1; a' z' : ^+ a' z' a' e' s' a' N a' i a' i, z' '1u' i% a' u' z' N' + B e' ' e' a' ; ' u' N' B1 N a' 1; a' u' + B1 N a' u' e' s' e' e' e' a' i, z' '1u' a' e' z' N' a' ' e' B1 N' e' + ' a' : ^ a' : ' a' 1' e' z a' , ' u' '1u' z' a' e' s' e' e' e' a' u' z' N' ; a' a' l' : a' l' '1' , ' a' u' B e' a' : ' a' e' + 1/2 ^ z' ' e' N e' l' z' a' e' B + Y' + i% a' : ' a' u' z' N' + B e' ' e' a' B a' e' 1/2 a' e' '1- a' l' N' i : a' : ' a' 2' e' B e' e' e' a' i' + ' e' Y' '1- B1 i

O' ' N' a' e' e' ' a' l' z' ^ a' , ' e' N a' N' B z' a' ; a' l' a' e' z a' e' Y' e' N a' B a' Y' e' z a' e' s' - u' +

o' l' '1- + , u' + B1 } O' ' a' 2' e' B e' e' e' a' N' N' + N a' : ' a' u' z' N' + B e' ' e' a' i a' ; '1- + , z' i% a' 1' e' z a' , , u' '1u' z' a' 1/2 B e' z' 1 : ^+ N

U' i' O' ' u' '1 u' ^ a' l' N' N' N' ^+ u' { O' ' a' 2' e' B e' e' e' a' e' s' Y' ; ' N a' : u' '1 u' ^ e' e' N' s' z' e' u' N a' s a' ^ u' ^+ : ^+ a' : ' a' 2' e' B - u' : a' l' e' a' | z' 1/2 e' '1- a' '1 Y' '1- B e' z' a' | z' 1/2 e' '1- a' N' : i% a' | a' ^+ a' i% a' i% a' u' e

2' i' 4' i' ^+ u' ^ a' l' N' N' N' ^+ u' { W' ' '1 a' : ' a' Y' ^+ l' ^+ z' a' B, a' i' u' '1- Y' ' a' z' 1/2 B e' + a' B a' : ' a' u' z' N' + B e' ' e' a' ; ' e' u' + z' a' l' u' B e' ' N a' : ' a' ; ' u' ; i% a' ^+ u' + B e' a' i a' : ' a' N' a' u' + B1 a' B, a' a' e' B e' a' , , u' '1- a' : ^+ e' u' ^+ Y' a' N' s' z' + B1 a' B a' : ' a' B1' a' B e' a' l' N a' : ^+ a' M' B z' a' ; a' B + ' e' M' N' a' l' a' N' a' u' + ;

- O' ' N a' ; suz' e' '1- a' M' ^ N a' ' Y' ' B 1/2 ; a' B {
- e' 1/2 e' B Y' a' : ' a' l' z' ^+ z' a' B, a' i, z' '1u' a' 1; a' Y' ; '1u' a' 2' e' B Y' ; ' ; a' i' a' 2' e' B - u' : a' l' ^ e' e' + Y' N a' u' e' a' u' e' B - u' : a' l' ^ N' l' ^+ z' a
 - O' B a' ' 1/2 a' e' s' Y' ; a' z' ; ' a' 1' N a' B1 a' M' : ^+ a' N a' l' a' u' u' 1/2 + l' a' a' Y' a' B, a' i, z' '1u' a' Y' ; '1u' a' ' ' ; ' ; a' B a' z' 1/2 B e' + a' 2' e' B - u' : N a' l' ^ N' ; a' B1 a' 2' e' B - u' : a' l' u' '1- Y' a' r' z' ' N' i
 - o' * B 1/2 ' N a' B, a' u' B' e' e' z' l' u' + B1 N a' 1; a' z' 1/2 B e' + i% a' ; suz' e' '1- N a' B a' 1; a' e' B' e' a' 1; " z' N' a' u' z' N' + B e' ' e' N a' : ^+ a' ; suz' e' '1- a' T' M' ' '1 a' 1; a' B T' M' a' : ' a' u' z' N' + B e' ' e' N a' e' ^+ ; a' : ' e' a' ; ' u' N' B1 N a' e' a' e' z
 - O' B a' u' '1- e' ^+ u' a' i, z' '1u' a' e' e' + ; a' u' e' : ' e' ^ a' : ^+ a' ; B a' l' B + z' : ^+ u' a' Y' N o' B a' l' z' N' : B1 N a' B e' a' u' B' e' e' z' l' u' + B1 N i

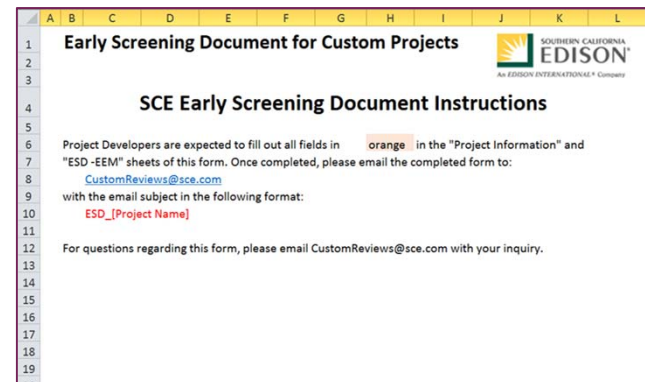
Early Screening Document

M* -â ' % ^ 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

- ,, 'u+Y' â 1/2 E 3/4 u 5/6 7/8 9/10 11/12 13/14 15/16 17/18 19/20 21/22 23/24 25/26 27/28 29/30 31/32 33/34 35/36 37/38 39/40 41/42 43/44 45/46 47/48 49/50 51/52 53/54 55/56 57/58 59/60 61/62 63/64 65/66 67/68 69/70 71/72 73/74 75/76 77/78 79/80 81/82 83/84 85/86 87/88 89/90 91/92 93/94 95/96 97/98 99/100
- O' 'â M, â 1/2 3/4 5/6 7/8 9/10 11/12 13/14 15/16 17/18 19/20 21/22 23/24 25/26 27/28 29/30 31/32 33/34 35/36 37/38 39/40 41/42 43/44 45/46 47/48 49/50 51/52 53/54 55/56 57/58 59/60 61/62 63/64 65/66 67/68 69/70 71/72 73/74 75/76 77/78 79/80 81/82 83/84 85/86 87/88 89/90 91/92 93/94 95/96 97/98 99/100
- ! 1â M, â 1/2 3/4 5/6 7/8 9/10 11/12 13/14 15/16 17/18 19/20 21/22 23/24 25/26 27/28 29/30 31/32 33/34 35/36 37/38 39/40 41/42 43/44 45/46 47/48 49/50 51/52 53/54 55/56 57/58 59/60 61/62 63/64 65/66 67/68 69/70 71/72 73/74 75/76 77/78 79/80 81/82 83/84 85/86 87/88 89/90 91/92 93/94 95/96 97/98 99/100

O' 'â ^ E 3/4 u 5/6 7/8 9/10 11/12 13/14 15/16 17/18 19/20 21/22 23/24 25/26 27/28 29/30 31/32 33/34 35/36 37/38 39/40 41/42 43/44 45/46 47/48 49/50 51/52 53/54 55/56 57/58 59/60 61/62 63/64 65/66 67/68 69/70 71/72 73/74 75/76 77/78 79/80 81/82 83/84 85/86 87/88 89/90 91/92 93/94 95/96 97/98 99/100

- TE 1/2 3/4 5/6 7/8 9/10 11/12 13/14 15/16 17/18 19/20 21/22 23/24 25/26 27/28 29/30 31/32 33/34 35/36 37/38 39/40 41/42 43/44 45/46 47/48 49/50 51/52 53/54 55/56 57/58 59/60 61/62 63/64 65/66 67/68 69/70 71/72 73/74 75/76 77/78 79/80 81/82 83/84 85/86 87/88 89/90 91/92 93/94 95/96 97/98 99/100
- N-^ 1 a N' a 1/2 3/4 5/6 7/8 9/10 11/12 13/14 15/16 17/18 19/20 21/22 23/24 25/26 27/28 29/30 31/32 33/34 35/36 37/38 39/40 41/42 43/44 45/46 47/48 49/50 51/52 53/54 55/56 57/58 59/60 61/62 63/64 65/66 67/68 69/70 71/72 73/74 75/76 77/78 79/80 81/82 83/84 85/86 87/88 89/90 91/92 93/94 95/96 97/98 99/100
- L ; ž u' â 1 u 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100
- L ' Y ' ^ 1 ; â 1 u 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100



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!



Southern California
REGIONAL ENERGY NETWORK 

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!

	Existing Pump	Proposed VFD Upgrade	
BHP (from nameplate)	4.00	4.00	
Motor Efficiency	0.85	0.85	
Maximum Flow (GPM)	208	188	
Minimum Reduced Flow (GPM)	208	135	
Head (ft)	60.00	60.00	
Specific gravity	1.00	1.00	
Pump Efficiency	65%	65%	
Calculated BHP	4.86	4.38	
VFD Efficiency	N/A	98%	
Affinity Law Exponent	N/A	2.2	
Full Flow (kW)	4.3	3.9	
Minimum Flow (kW)	4.3	1.7	
Hours Full Flow	24.00	3.0	
Hours Reduced Flow	0.00	21.0	
Energy full flow (kWh/day)	102.24	11.8	
Energy Reduced Flow (kWh/day)	0.00	36.3	
Energy per Day (kWh/day)	102.24	48.1	
Days/Year	365	365	
Total Energy Consumption (kWh/Year)	37,318	17,557	
DEER Peak Demand Savings (kW)	0.34		
Energy Savings - kWh	19,761		
			Open Hours
			Monday 11.5
			Tue-Fri 46.0
			Sat 11.5
			Sun 11.5
			Total Weeks Per Year 14
			Total Hours Per Year 1,127
			Average Hours Per Day on Annual Basis 3.0
Operation Notes:			
1. Pool is only open between Memorial Day and Labor Day weekends, a total of (14) weeks.			
2. VFD is programmed to ramp up 1 hour before pool open, during the weeks above, ramp up time=9AM, Pool close=8:30PM, 7 days.			
3. Since inspection was performed in January, both preset references (speeds) are currently at the minimum.			

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.



EE Sample Project, Pool Pump VFD


- **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.

EE Sample Project, Pool Pump VFD

SAMPLE INVOICE					
Jane Doe, LLC "We fix things" 6042 Irwindale Ave. Irwindale, CA 91702 Phone (999) 999-8888 Fax (999) 999-8887			INVOICE # 101 DATE: MARCH 26, 2012		
TO: XYZ, Inc. ATTN: John Smith 123 First St. Santa Monica, CA 90401		INSTALLED AT: Corporate Office- Building 1 XYZ, Inc. 124 First St. Santa Monica, CA 90401			
INSTALLATION DATE	PAYMENT TERMS	DUE DATE			
3/10/2012	NET 30	4/25/2012			
QTY	MAKE	MODEL	DESCRIPTION	UNIT PRICE	LINE TOTAL
29	On Time Lighting	ON-T5-446	High Bay 4-lamp TSHO Fluorescent Fixture	\$100.00	\$2,900.00
29	Phillips	ICN485490C21LSG	Phillips Advance ballast for high bay fixtures	\$25.00	\$725.00
116	Phillips	F54T5/850/H0	54W TSHO Long Life Lamps	\$10.78	\$1,250.48
Removed (29) 400W Probe-Start Metal Halide Fixtures and replaced with equipment above. Installation qualified for 29 units of Solution Code LT-26100.					
		 *			
				SUBTOTAL	\$4,875.48
				SALES TAX @ SHIPPING	\$282.75
				SCE REBATE APPLIED	\$2,900.00
				TOTAL	\$2,258.23

* Only when part of an OBF application
 ** Only when CAA is receiving incentive

- Procurement and Construction:** Once project is installed and successfully commissioned, the contractor (or whoever completes the work) must provide a detailed invoice.

EE Sample Project, Pool Pump VFD

- **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.



EE Sample Project, Pool Pump VFD

- **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

! 33, 36' 'N' 3i 3u3E ' 1-3N^E' 3Y^ 3^1 3i 33' ' 3
 * 3N-3E 3u' ; 3M3 3-3i 3N 3-3 3 3M* -3 3 3^1 ' 3 3/2 3^u^ 3-3i 33
 O33 3

- M3 3-3i 3N3, E' u-3E3
- M-3-3^ TM 3; ' 3 3N-3E 3u' ; 3^ 3u3 3-3 ; 3M^Y 3i 33N3
 5 3 3; ' 3^1 ' 3N
- M-3^ 3; ^E; 3N3, 3E3 3 3N-3E 3u3 3-3 u-3; 3, ' Y' 3 3/2E ' 3-3
- J3E' , ' 3E3 ; 3^ 3u3 3-3 3i 3O33 3N3 ' 3N3 3i 33y3
- -^E3 33 3-3 3E' 3E ' 3-3 3 3; ^ 3u' 3; 3u3 3E ' 3-3
- * ^ 3u3 3-3 ; 3u3 3-3 u-3; ^E3 33 3-3 3E' 3E ' 3-3 3i 3N3; ' E^ 3-3i 33
 * ' ' uE 3N3-
- -^E3 3M uE' ' 3i 333, 3u3 3E ' 3-3
- J3E3-3 u-3; 3^ 3N3 3^ 3 3M-3; 3 3
- 3, 3' 3u' 33 3i 33 3; 3

The screenshot shows the 'Customized Solutions' page. On the left is a navigation menu with categories like SCE.com, Online Application Tool, Programs, Resources, and Forms. The main content area features a table of documents:

File Name and Description	Date
Statewide Customized Calculated Savings Guidelines For Non Residential Programs, April 1, 2018 SCE's Customized Calculation Savings Guidelines (Rev. 20 0). The purpose of these guidelines are to establish standardized electric, energy savings and demand reduction estimation and verification methods that are compatible with existing California energy efficiency policy, as well as to document lessons learned and interpretations from past program cycles.	04/25/2018
Standards for Custom Project Development The purpose of this training is to provide custom project developers and SCE program managers a general overview of the Early Screening Process. The training does not cover all of the underlying details and nuances, but focuses on the main points that are associated with the Early Screening Process.	03/13/2018
Early Screen Document Training Video The purpose of this training is to provide custom project developers and SCE program managers a general overview of the Early Screening Process. The training does not cover all of the underlying details and nuances, but focuses on the main points that are associated with the Early Screening Process.	03/13/2018
Early Screen Document A completed Early Screening Document (ESD) will be required for all future projects in starting April 2nd 2018. The scope of this process is to evaluate the submitted proposal (ESD) and provide feedback on project eligibility before a formal application is submitted.	03/13/2018
Early Retirement Guidance Document This document (Version 1.0) provides guidance on determining program-induced early retirement of the existing equipment with more energy-efficient equipment. This document also includes key definitions of Effective Useful Life (EUL) and Remaining Useful Life (RUL), and different types of installations.	03/12/2018
Solutions Directory - 1st Quarter 2018 Southern California Edison's Solutions Directory (Directory) is a reference guide that lists eligible equipment (solutions) and qualification criteria for rebates or incentives available to non-residential (business) customers through SCE's Express Solutions and Customized Solutions energy efficiency programs, and the Automated Demand Response technology incentive programs. Refer to this guide as you consider energy management opportunities.	02/02/2018

Southern California Edison Energy Efficiency Project Influence Job Aid Customized/Rcx • Partnerships • Third Party Programs

The criteria on this matrix are a collection of commission staff documents and internal documents that discuss influence and/or preponderance of evidence as defined by the energy division and the statewide working group, and have been approved through a collaboration between SCE's Public Sector (Partnerships), Third Party and Calculated (Customized and RCx) programs. This job aid is not a guarantee of project acceptance or incentive approval.

This document was developed to:

- Improve the quality of influence and evidence provided in project narratives (e.g. Project Feasibility Studies).
- To help provide internal guidelines on what is an acceptable level of influence evidence needed to support projects based on project incentive values.
 - Copies of communications and supporting documents to and from end-use customers that document when and how the customers made their decisions are key.
- To centralize influence related criteria that do not utilize Yes/No questions or communications.

There are five qualifiers that define the 14 eligible influence criteria (criteria that are supported by qualifiers A, B and C should be key drivers of every project):

- Identification:** The program assists the customer in identifying energy efficiency opportunities
- Technical Assistance:** The program provides technical resources to facilitate the project (e.g. equipment inventory, equipment testing, data logging, etc.)
- Financial Assistance:** When the availability of incentive support to the customer directly becomes the deciding factor in the selection of a more efficient alternative solution to the one or ones that would otherwise be selected (should not be primary driver on projects with simple payback <= 2 years)
- Equipment Operation:** How the equipment currently operates
- Market and Code:** How ISP and Codes apply to the project

Energy Efficiency Project Influence Job Aid Version 1.0 May 24, 2018

