

TABLE OF CONTENTS

SECTION 1: PROGRAM DESCRIPTION..... 1

SECTION 2: OBJECTIVES3

SECTION 3: GENERAL REQUIREMENTS3

SECTION 4: SCHEDULE OR TASKS DELAYS.....4

SECTION 5: STATEMENT OF WORK4

 Task 1 - Program Ramp-up 4

 Task 2 - Strategic Plan Goal 1 5

 Task 2.A – Adopt building energy codes more stringent than Title 24’s requirements ... 5

 Task 2.B – Adopt a Green Building ordinance for municipal development, commercial development and/or residential development 8

 Task 2.C – Develop and adopt programs to encourage energy efficiency such as , on-line permitting, separate Zero Net Energy permit processes, density bonuses, or recognition program.10

 Task 3 - Strategic Plan Goal 412

 Task 3.A – Customize CAP with energy efficiency language and data12

 Task 3.B – Update General Plan/Conservation Element with Climate policies. Provide energy efficiency framework and data for other people doing planning14

 Task 3.C. – Conduct the energy efficiency savings analysis for an annual Greenhouse Gas inventory for the County.....17

 Task 4 – Invoicing and Reporting.....18

 Task 5 - Ramp-Down and Shut-Down Program20

 Task 6 - Submit Final Program Report.....21

SECTION 6: PAYMENT21

SECTION 7: PERFORMANCE INDICATORS22

 Appendix A: Monthly Invoicing and Reporting Requirements24

 Appendix B: Regulatory Reporting Requirements26

 Appendix C: Billing Schedule (Updated During Negotiations).....31

TABLES

Table 1: Implementer T&M Hourly Billing Rate22

Table 2: Implementers Budget Breakdown.....22

Statement of Work

PROGRAM IMPLEMENTER: SANTA BARBARA COUNTY (SBC)

PROGRAM NAME: SANTA BARBARA COUNTY ENERGY EFFICIENCY PROGRAM

PROGRAM BUDGET: \$283,000

SECTION 1: PROGRAM DESCRIPTION

A. Program Background: Pursuant to Decision 09-09-047, the CPUC authorized Southern California Edison (“SCE”) to conduct strategic plan activities centered on energy efficiency and addressing the “Big, Bold” strategies and related local government goals found in the CPUC’s California’s Long-Term Energy Efficiency Strategic Plan (“CEESP”)¹. Based on this authorization, SCE conducted a solicitation seeking to fund activities that would lead to long-term, sustainable changes as opposed to supporting staffing resources or short-term initiatives that would cease to exist once the funding had ended.

One of the selected programs in this solicitation is the SBC Energy Efficiency Program (“Program”) which promotes long-term energy efficiency under the umbrella of the SBC’s Climate Change Guiding Principles. That umbrella includes the Climate Action Strategy, a future consideration of the Climate Action Plan (CAP), and the innovative SBC Board of Supervisors (BOS)-approved emPowerSBC program. The emPowerSBC program provides a convenient financing option to empower residents and businesses to green their property through energy efficiency, water efficiency or renewable improvements. The Program will be implemented by the Santa Barbara County (“Implementer”). to promote long-term energy efficiency, sustainability and reduced greenhouse gas (GHG) emissions for SBC residents, businesses and agricultural operations.

The Implementer, through the South County Santa Barbara Community Energy Partnership (“CEP”), will implement the Program to integrate long-term energy efficiency and climate action planning for Santa Barbara County and implement the Program to integrate long-term energy efficiency and climate action planning within SBC. It will perform the tasks required in order to demonstrate how the County can meet the objectives of the CEESP while utilizing the following CEESP Goals:

- **Strategic Plan Goal 1:** Local governments lead adoption and implementation of “reach” codes stronger than Title 24 on both mandatory and voluntary bases; and

¹ Please go to www.californiaenergyefficiency.com for a copy of the CEESP.

- **Strategic Plan Goal 4:** Local governments lead their communities with innovative programs for energy efficiency, sustainability and climate change.

B. Defined Terms: Capitalized terms not otherwise defined in this Statement of Work (“SOW”) will have the meaning ascribed to them in the Contract, which is attached to the SOW and incorporated herein by reference.

1. **Business Day:** The period from one midnight to the following midnight, excluding Saturdays, Sundays, and holidays.
2. **Calendar Day:** The period from one midnight to the following midnight, including Saturdays, Sundays, and holidays.
3. **Month or Monthly:** A term ending on the last Calendar Day of each month
4. **Change Order:** Document SCE issues to Implementer and, unless otherwise provided in the Contract, Implementer accepts, and which changes or modifies the terms of the Contract.
5. **Contract:** Document issued by SCE to Implementer, as may be amended in writing as provided therein, which authorizes the Work, states the terms and conditions and incorporates by reference the Statement of Work and any other referenced documents, if applicable, all of which form the agreement (Contract) between SCE and the Implementer, with the following priority in the event of conflicting provisions: Change Orders, from the most recent to the earliest; the Statement of Work; the Contract; and any other referenced documents and which facilitates payment to the Implementer for the Work described herein.
6. **Contract Program Manager or CPM:** The SCE Representative who will manage the Program.
7. **CPUC:** The California Public Utilities Commission.
8. **Government Partnerships (“GP”):** Partnerships formed with California local governments and California’s IOUs designed to achieve immediate, long-term peak energy and demand savings and establish a permanent framework for sustainable, long-term, comprehensive energy management programs and set the foundation for sustainability and best practices for a given partnership’s participating jurisdictions and customers.
9. **Innovative Building Review Program (I.B.R.P.):** A voluntary program available to applicants that provides professional advice for improving the energy efficiency for improving the energy efficiency of their project.

10. **Performance Indicators:** Specific, measureable, actionable, realistic and time-specific requirements that will directly and measurably contribute to SCE’s business goals for the Agreement.
11. **SCE Representative:** The CPM or such other representative authorized by SCE to manage this Program.
12. **Subcontractor:** An entity contracting directly or indirectly with Implementer to furnish services or materials as part of or directly related to Implementer’s Work.
13. **Title 24: California Code of Regulations (CCR), Title 24,** also known as the California Building Standards Code (composed of 12 parts). Title 24, Part 6 sets forth California's energy efficiency standards for residential and nonresidential buildings and was established in 1978 in response to a legislative mandate to reduce California's energy consumption. The standards are updated periodically to allow consideration and possible incorporation of new energy efficiency technologies and methods. The current Title 24, Part 6 and the amendment of Part 11 is the focus of the Work under this Purchase Order.
14. **Work:** Any and all obligations of Implementer to be performed for the Partnership pursuant to and during the term of the Contract, any revision to the Contract, or a subsequent Contract or Contract Addendum incorporating this Statement of Work. The Work will include, but may not be limited to, the tasks described in Section 5 of this Statement of Work.

SECTION 2: OBJECTIVES

Through the Program, the Implementer will:

- Develop and implement policies, processes, templates and/or models to ensure that the SBC achieve a total reduction in County emissions from the baseline of 15% or to 1990 levels by 2020.

SECTION 3: GENERAL REQUIREMENTS

A. Notice to Proceed (“NTP”): Implementer may start Work only upon the occurrence of each of the following:

- Implementer receives the Contract;
- Implementer provides to the CPM a signed acknowledgement form of the Contract; and
- CPM provides to Implementer written approval to proceed.

- B. Goals:** The primary goal of the Program is to achieve the objectives and Performance Indicators set forth herein, in the time frame herein. SCE will regularly review the implementation schedule (milestones, delivery dates, etc.) contained herein against actual Work performed by Implementer to assess the Program's progress.

SECTION 4: SCHEDULE OR TASKS DELAYS

If the schedule or a task (including achievement of goals as outlined herein) is delayed for any reason, Implementer has the responsibility to notify the CPM in writing within thirty (30) Business Days. SCE may accept the delay, allow time for the remedy of the delay, reduce both the budget and the Work, or terminate the Contract within thirty (30) Business Days following receipt of any written notice of delay from Implementer.

SECTION 5: STATEMENT OF WORK

The Work for each of the CEESP Goals and associated tasks are described below:

Task 1 - Program Ramp-up

- A. Attend Program Kick-off Meeting:** Implementer's representative(s) will attend a half-day Program kick-off meeting with the CPM to discuss Program logistics, marketing coordination, evaluation, monitoring and verification coordination, invoicing requirements, scope of Work, and any remaining Contract issues at an SCE -designated location.

Implementer's representative will attend the Program kick-off meeting at a time and place to be determined by SCE after the issuance of the NTP.

- B. Program Data, Invoicing, and Reporting Tool Training:** The Implementer will attend a half-day workshop (Webcast) that provides training on the use of SCE invoicing and reporting tool ("IR Tool"). The Implementer will attend IR Tool training at a time and place to be determined by SCE after the issuance of the NTP.

Deliverable(s)	Due Date(s)
1. Attend a half-day Program Kick-off Meeting	Determined by SCE after the issuance of the NTP.
2. Attend a half-day IR Tool training session and ongoing IR Tool update training.	Determined by SCE after the issuance of the NTP or notification of IR Tool program changes.
3. Delivery flat files (first draft) to CPM for review and approval.	IR Tool training plus 5 Calendar Days.
4. Delivery of flat files (final draft) to CPM for review and approval.	IR Tool training plus 10 Calendar Days.

Task 2 - Strategic Plan Goal 1

Strategic Plan Goal 1: Local governments lead adoption and implementation of “reach” codes stronger than Title 24 on both mandatory and voluntary bases.

- Task 2.A (Strategic Plan Task 1.1.1): Adopt building energy codes more stringent than Title 24’s requirements for new buildings, using cost-effectiveness studies by Climate Zone done by the utilities; implement one or two additional tiers of increasing stringency through the I.B.R.P;
- Task 2.B (Strategic Plan Task 1.1.2): Adopt a Green Building ordinance for new municipal development, commercial development and/or residential development;
- Task 2.C (Strategic Plan Task 1.1.5): Develop and adopt programs to encourage energy efficiency such as , on-line permitting, separate voluntary Zero Net Energy permit processes through I.B.R.P offering reduced energy plan review costs and expedited plan review, density bonuses, or a recognition program;

Task 2.A – Adopt building energy codes more stringent than Title 24’s requirements

As part of the Program, Implementer will amend Chapter 10 of the SBC code adopting the California Energy Code, Part 6 of Title 24. The Program will contain emission reduction measures requiring Building and Safety to amend or adopt new energy standards. The new energy standards will be referenced through the adoption of Tier One energy efficiency standards as set forth in the California Green Code. The Tier One energy component of the standard will mandate a 15% increase above the compliance margin of computer based prescriptive programs approved by the California Energy Commission for energy consumption in a building. Building and Safety will be working concurrently with the

I.B.R.P. committee to develop reach codes, a green building ordinance with a voluntary component, and reinvent, expand, and maximize the existing energy efficiency incentive program. These activities will provide substantial development incentives to exceed minimum code requirements and energy efficiency standards.

Planning and Development will report on the County's efforts at the Technical Planning Advisory Committee (TPAC) meetings held by our local MPO, Santa Barbara County Association of Governments (SBCAG). The County can use TPAC to keep all the local governments within the MPO updated on our progress, successes and failures, and an avenue to supply drafts or templates of our work for use by those jurisdictions.

Additionally, the County will pursue available recognition awards through ICLEI – Local Governments for Sustainability, the California State Association of Counties (SCAC), the Institute for Local Governments, and the Local Governments Commission. County staff will be available to provide outreach through attending workshops, conferences, and seminars through these organizations and others on the success and failures of our CAP and implementing programs.

As part of the implementation of the Program, the Implementer will prepare and move to adopt more stringent building codes through the following process:

1. Amend the State Code to capture the new requirements of more stringent codes;
2. Amend the existing SBC Building Code that clearly outlines the mandatory requirements and the optional reach code with incentive;
3. Expand the IBRP to update the energy efficiency baseline requirements with the 2010 California Energy Code and proposed Reach code;
4. Provide developers with the avenue and incentives through I.B.R.P. to pursue energy efficient options in new construction and retrofit projects. Without these codes in place there would be a barrier for developers to move towards energy efficiency;
5. Take the Cost Effectiveness Study currently being completed by SCE and PG&E for the Santa Barbara County climate zones and determine if the proposed 2010 California Energy Code should be adopted as written or if more stringent codes are warranted;
6. If more stringent codes are warranted, develop a recommended code by amending the state code to capture the new requirements identified in (5);
7. Draft a local ordinance to adopt the recommended code;

8. Proceed to BOS adoption;
9. Submit the more stringent code to the CEC for approval under Public Resources Code Section 10-106; and
10. Provide public education and outreach.

The Enhanced Energy and Building Codes will be considered implementing actions of the proposed CAP.

The implementer will, at a minimum, track the following information through the IR Tool:

1. Develop baseline by auditing existing buildings;
2. Verify SCE and PG&E incentive or rebate applications were provided to property owners or contractors for installation of measures exceeding Title 24; and
3. Determine how many residents or contractors participated in a workshop, training or other educational program.

The Implementer will quantitatively assess the value and benefits of the Program's tasks through the establishment of ordinances, and the expansion of IBRP to implement the policies recommended for inclusion in the CAP and for incorporation of the relationship to the emPowerSBC program as verification arm that will lead to increased energy efficiency in the County. These improvements will be tracked using permitting data.

Implementer will provide all materials developed under this task to CPM for review and comment:

1. Report on Status of Consultant or Subcontractor to Support the Task;
2. Reach Code Assessment and Planning Report – Implementer shall include review of the Cost Effectiveness Study for relevant climate zones and assess sufficiency for code development, assessment of existing reach codes and resources, and plan for developing reach codes based on the information gained from the assessment. This may be in the format of a memo report or full report;
3. Draft Code and Ordinance Amendment;
4. Report on Stakeholder Input - Implementer shall include list of all stakeholder meetings, workshops, etc.; list of all attendees and contact info by workshop; and discussion on how input was used in refining the policy. Implementer may also include community stakeholder meetings;
5. Final Code and Ordinance Amendment;
6. Submit Code and Ordinance Amendment to Board of Supervisors for adoption - If policy is adopted, Implementer shall submit date on which the policy becomes

effective. If policy is rejected, Implementer shall submit memo report on reasons for rejection and alternate plans;

7. Submit Code to CEC for Approval Under Section 10-106; and
8. Monthly reports of tracked Performance Indicators.

Task 2.A. - Deliverable(s)	Due Date(s)
1. Report on Status of Consultant or Subcontractor to Support the Task.	NTP + 30 days.
2. Reach Code Assessment and Planning Report	NTP + 45 days
3. Draft Code and Ordinance Amendment	N.T.P. + 60days
4. Report on Stakeholder Input: Code and Ordinance Amendment	September 2011
5. Final Code and Ordinance Amendment	October 2011
6. Submit Code and Ordinance Amendment to Board of Supervisors for adoption	November 2011
7. Submit Code to CEC for Approval Under Section 10-106	December 2011
8. Monthly reports of tracked Performance Indicators	Monthly

Task 2.B – Adopt a Green Building ordinance for municipal development, commercial development and/or residential development

As part of the Program, Implementer through will develop a Green Building Ordinance with a voluntary component. The County proposes to make some components of CalGreen Tier 1 mandatory and provide incentives for exceeding minimum requirements. This will occur through expanding the existing Innovative Building Review Program (IBRP), which is already well established, to include the scope of the voluntary portion of Green Building Ordinance. IBRP is a program administrated by Planning and Development, which advises developers on how to make their project exceed Title 24 efficiency level by 20% and greater. No incentives will be paid from this contract.Planning and Development will report on the SBC’s efforts at the Technical Planning Advisory Committee (TPAC) meetings held by our local MPO, Santa Barbara County Association of Governments (SBCAG). The Implementer can use TPAC to keep all the local governments within the MPO updated on our progress,

successes and failures, and as an avenue to supply drafts or templates of our work for use by those jurisdictions.

Additionally, the Implementer will pursue available recognition awards through ICLEI – Local Governments for Sustainability, the California State Association of Counties (SCAC), the Institute for Local Governments, and the Local Governments Commission. SBC staff will be available to provide outreach through attending workshops, conferences, and seminars through these organizations and others on the success and failures of our CAP and implementing programs.

As part of the implementation of the Program, the Implementer will:

1. Draft a voluntary incentive based Green Building Ordinance with input from the Built Green Focus Group or qualified panelists;
2. Add the Green Building Ordinance to the existing IBRP program; and
3. Take the ordinance to the Planning Commission and BOS for approval.

Through the IR Tool, the implementer will, at a minimum, track elements of the Green Building Ordinance included in the expanded IBRP.

The Implementer will quantitatively assess the value and benefits of this Program’s tasks through the establishment of ordinances and an expanded IBRP to implement policies recommended for inclusion in the CAP.

Implementer will provide all materials developed under this task to CPM for review and comment:

1. Green Building Ordinance Assessment and Planning Report – Implementer shall include assessment of existing Green Building policies and resources, including those offered by NGOs and plan for developing Green Building policy based on the information gained from the assessment. Implementer may also include analysis of building trends, market research. This may be in the format of a memo report or full report.
2. Draft Green Building Ordinance.
3. Report on Stakeholder Input - Implementer shall include list of all stakeholder meetings, workshops, etc.; list of all attendees and contact information by workshop; and discussion on how input was used in refining the policy.
4. Final Green Building Ordinance.
5. Submit Green Building Ordinance/Program to Board of Supervisors for adoption - If policy is adopted, Implementer shall submit date the policy becomes effective. If policy is rejected, Implementer shall submit memo report on reasons for rejection and

alternate plans.

6. Monthly reports of tracked Performance Indicators

Task 2.B. – Deliverable(s)	Due Date(s)
1. Green Building Ordinance Assessment and Planning Report	NTP + 45 days
2. Draft Green Building Ordinance	September 2011
3. Report on Stakeholder Input: Green Building Ordinance	October 2011
4. Final Green Building Ordinance	November 2011
5. Submit Green Building Ordinance/Program to Board of Supervisors for adoption	December 2011
6. Monthly reports of tracked Performance Indicators	Monthly

Task 2.C – Develop and adopt programs to encourage energy efficiency such as , on-line permitting, separate Zero Net Energy permit processes, density bonuses, or recognition program.

As part of the Program, Implementer will expand the IBRP to include linkages with the new emPowerSBC program regarding knowledge of building performance as it relates to the options authorized to be financed by emPowerSBC. IBRP will also be expanded to develop and implement a streamlined energy permitting process that will act as a verification arm for the empowerSBC program.

Planning and Development will report on the SBC’s efforts at the Technical Planning Advisory Committee (TPAC) meetings held by our local MPO, Santa Barbara County Association of Governments (SBCAG). The Implementer can use TPAC to keep all the local governments within the MPO updated on our progress, successes and failures, and as an avenue to supply drafts or templates of our work for use by those jurisdictions.

Additionally, the Implementer will pursue available recognition awards through ICLEI – Local Governments for Sustainability, the California State Association of Counties (SCAC), the Institute for Local Governments, and the Local Governments Commission. SBC staff will be available to provide outreach through attending workshops, conferences, and seminars through these organizations and others on the success and failures of our CAP and implementing programs.

The Implementer will assess the value and benefits of this Program's task through an expanded IBRP to implement the policies recommended for inclusion in the CAP and incorporation of the relationship to the emPowerSBC program as verification arm that will lead to increased energy efficiency in the SBC.

Implementer will provide all materials developed under this task to CPM for review and comment:

1. Report on Status of Consultant or Subcontractor to Support the Task - Document selection or development process for online permit system.
2. Assessment and Planning Report for the Development of a Program That Encourages Energy Efficiency – Implementer shall include assessment of existing programs and resources, plan for developing a program based on the information gained from the assessment, and outreach plan.. Implementer may also include procedures drafted to outline permitting, verification, cross referral/co-marketing and other streamlined processes between IBRP and emPowerSBC. This may be in the format of a memo report or full report.
3. Review Documents Developed During Program Implementation – Implementer shall include evidence of the new IBRP program and incentives, final draft of procedures related to emPowerSBC, and outreach material. Implementer may also include invoice for software purchase, MOU for use of software, updated procedures and training plan for city staff, and website supporting program.
4. Monthly Reports on Outreach and Education Efforts – Implementer shall include list of all stakeholder meetings, workshops, etc.; list of all attendees and contact info by workshop; and discussion on how input was used in refining the policy.
5. Plan for Sharing Lessons Learned/Best Practices With Other Local Governments.
6. Implement newly expanded IBRP in place including linkage with new emPowerSBC program – If the program is adopted, Implementer will submit date the program will be implemented. If the program is not adopted, Implementer will submit memo report on reasons for rejection and alternate plans.
7. Monthly reports of tracked Performance Indicators.

Task 2.C. – Deliverable(s)	Due Date(s)
1. Report on Status of Consultant or Subcontractor to Support the Task.	October 2011
2. Assessment and Planning Report for the Development of a Program That Encourages Energy Efficiency	October – December 2011
3. Review Documents Developed During Program Implementation	January 2012
4. Monthly Reports on Outreach and Education Efforts	Monthly
5. Plan for Sharing Lessons Learned/Best Practices With Other Local Governments	February 2012
6. Implement newly expanded IBRP in place including linkage with new emPowerSBC program	February 2012
7. Monthly reports of tracked Performance Indicators	Monthly

Task 3 - Strategic Plan Goal 4

Strategic Plan Goal 4: Local governments lead their communities with innovative programs for energy efficiency, sustainability and climate change.

- Task 3.A. (Strategic Plan Task 4.1.2): Customize CAP and EAP with energy efficiency language and data
- Task 3.B. (Strategic Plan Task 4.1.3): Update General Plan/Conservation Element with Climate policies. Provide energy efficiency framework and data for other people doing planning
- Task 3.C. (Strategic Plan Task 4.1.4): Conduct the energy savings analysis for annual Greenhouse Gas Inventory

Task 3.A – Customize CAP with energy efficiency language and data

As part of the Program, Implementer will develop the energy efficiency component of its CAP (EE-CAP) to provide a set of measures for how the community can increase their energy efficiency and the EE-CAP will be adopted into the Comprehensive General Plan.

The EE-CAP will provide policies that commit the Implementer to developing Reach Codes and increasing the energy efficiency in the community.

The EE-CAP will be integrated in the Santa Barbara County Comprehensive General Plan Energy Element. The Energy Element is an existing adopted element that provides goals and policies to promote energy efficiency and energy conservation in Santa Barbara County. The EE-CAP and updated Comprehensive General Plan will be available on the Planning and Development Department website for use as a model for other jurisdictions. Additionally, the greenhouse gas emission inventory will be made available to the public online.

Through the Program, the Implementer will develop the EE-CAP, which will provide overarching energy efficiency policies. Policies and programs that address energy efficiency included in the EE-CAP will be selected by conducting a cost-benefit analysis on possible emission reduction measures identified in the Climate Action Strategy as discussed in Task 3.C. Examples of policies that could be included are listed below. Final policies included in the EE-CAP will depend upon the findings on the emission reduction measures and Board of Supervisors approval. The following are examples of the types of policies and programs that may be included in the EE-CAP:

1. Provide incentives for the purchase of energy efficient equipment, lights, and appliances,
2. Adopt an incentive-based residential and commercial green building policy and develop a green building code for those sectors,
3. Provide incentives for energy standards greater than Title 24,
4. Enhance the County's IBRP to include permit streamlining or other incentives,
5. Other energy efficient measures identified through research.

The Implementer will, at a minimum, track the following information through the IR Tool:

Data collected annually from the utility companies to track the expected decline in energy consumption. The Implementer is currently developing a greenhouse gas emissions inventory, which includes data on energy consumption for the unincorporated areas of the Santa Barbara County. This data will be used as a baseline for both energy consumption and greenhouse gas emissions in the monitoring program discussed below.

Following implementation of the EE-CAP, a monitoring program will be set in place, with annual reporting, to measure the success of the EE-CAP and allow for ongoing refinement and improvement, if needed. The monitoring program will use the greenhouse gas emissions inventory currently being developed as the baseline, as stated above. Energy efficiency improvements in the community can be measured based on permitting data and reports on

generic energy usage by zip code given by the utility company. Energy usage data shared by SCE will not include any confidential customer data as determined by SCE. Using this data we will quantify greenhouse gases reduced as a result of energy efficiency improvements. Additionally, the implementer is currently evaluating software to be used to track energy consumption and greenhouse gas emissions as part of the EE-CAP monitoring program.

Implementer will provide all materials developed under this task to CPM for review and comment:

1. Report on Status of Consultant or Subcontractor to Support the Task
2. Draft EE-CAP – Implementer shall include a detailed energy efficiency chapter.
3. Report on Stakeholder Input - Implementer shall include a list of all stakeholder meetings, workshops, etc., list of all attendees and contact info by workshop, and discussion on how input was used in refining the policy. Implementer may also include community stakeholder meetings.
4. Final EE-CAP
5. Submit CAP to Board of Supervisors for adoption - If policy is adopted, Implementer shall submit date the policy becomes effective. If policy is rejected, Implementer shall submit memo report on reasons for rejection and alternate plans.
6. Monthly reports of tracked Performance Indicators

Task 3.A. – Deliverable(s)	Due Date(s)
1. Report on Status of Consultant or Subcontractor to Support the Task	NTP + 3 Months
2. Draft EE-CAP	NTP + 7 Calendar Months
3. Report on Stakeholder Input	NTP + 12 Calendar Months
4. Final EE-CAP	NTP + 13 Calendar Months
5. Submit CAP to Board of Supervisors for adoption	NTP + 14 Calendar Months
6. Monthly reports of tracked Performance Indicators	Monthly

Task 3.B – Update General Plan/Conservation Element with Climate policies. Provide energy efficiency framework and data for other people doing planning

At present, Santa Barbara County does not have a comprehensive program to promote and achieve energy efficiency and GHG emissions reduction. Recent State legislation (AB 32, SB 375 and SB 97) underscores the importance of broad-based climate protection measures and

calls for action by local governments. In compliance with these State laws, Implementer is presently preparing a Climate Action Strategy (“CAS”) and GHG inventory of all GHG emissions, direct and indirect, generated by activities within the County. The goals and strategies formulated in the CAS will be followed with a detailed CAP to implement concrete policies and measures to achieve GHG emissions reduction that focus on energy efficiency incentives.

As part of the Program, Implementer will develop a customized energy efficiency component of its CAP and Amend the Energy Element of the Comprehensive General Plan to include the CAP.

The CAP and updated Comprehensive General Plan will be available on the Planning and Development Department website for use as a model for other jurisdictions. Additionally, the greenhouse gas emission inventory will be made available to the public online.

Planning and Development will report on the County’s efforts at the Technical Planning Advisory Committee (TPAC) meetings held by our local MPO, Santa Barbara County Association of Governments (SBCAG). The County can use TPAC to keep all the local governments within the MPO updated on our progress, successes and failures, and an avenue to supply drafts or templates of our work for use by those jurisdictions

Taking the recommendations of the CAS, Implementer will develop a CAP using the greenhouse gas emissions inventory as a baseline for identifying reduction opportunities. Selection of reduction measures will follow an economic efficiency approach. Emission reduction measures will be selected and implemented following a cost-benefit analysis. Measures that produce the greatest reduction at the least cost will be the first priority. A large focus of the CAP will be dedicated to energy efficiency insofar as the AB 32 Scoping Plan identified energy efficiency as one of the four measures that accounts for 75% of GHG emission reductions in the State.

The CAP will be integrated in the Santa Barbara County Comprehensive General Plan Energy Element.

The CAP will be developed using the greenhouse gas emissions inventory being completed under the CAS, which the Implementer is currently working to complete. The inventory will provide the Implementer with a baseline of greenhouse gas emissions for the energy sector. GHG emissions from the energy sector will be determined using data on utility bills. Once the CAP has been adopted, a monitoring system will be put in place that will report annually on the status of the CAP. Data can be collected each year from the utility companies to track the expected decline in energy consumption

The CAP will put policy in place that will commit the County to improving energy efficiency in both municipal operations and the community, provide the co-benefits of a reduction in greenhouse gas emissions, promoting public health, supporting economic vitality, and allow for the streamlining of CEQA review for greenhouse gas emissions for future development projects.

The CAP will include a monitoring program to measure results of its implementation on an annual basis. The monitoring program will use the greenhouse gas emissions inventory currently being developed as the baseline. Energy efficiency improvements in the community can be measured based on permitting data and municipal improvements will be tracked internally. Using this data we will quantify greenhouse gases reduced as a result of energy efficiency improvements

Implementer will provide all materials developed under this task to CPM for review and comment:

1. Report on Status of Consultant or Subcontractor to Support the Task;
2. Updated General Plan with Climate policies;
3. Submit Updated General Plan to Board of Supervisors for adoption - If policy is adopted, Implementer shall submit date the policy becomes effective. If policy is rejected, Implementer shall submit memo report on reasons for rejection and alternate plans; and
4. Report on Dissemination of Lessons Learned/Best Practices to Other Municipalities.

Task 3.B. - Deliverable(s)	Due Date(s)
1. Report on Status of Consultant or Subcontractor to Support the Task	NTP + 3 Months
2. Updated General Plan with Climate policies	NTP + 13 Calendar Months
3. Submit Updated General Plan Board of Supervisors for adoption	NTP + 14 Calendar Months
4. Report on Dissemination of Lessons Learned/Best Practices to Other Municipalities	NTP + 15 Calendar Months

Task 3.C. – Conduct the energy efficiency savings analysis for an annual Greenhouse Gas inventory for the County

Taking the recommendations of the Climate Action Strategy, Implementer will develop a Climate Action Plan using the greenhouse gas emissions inventory as a baseline for identifying reduction opportunities. Selection of reduction measures will follow an economic efficiency approach. Emission reduction measures will be selected and implemented following a cost-benefit analysis as discussed in Task 3.A. The Plan for Customization will serve as the cost-benefit analysis of the emission reduction measures. Measures that produce the greatest reduction at the least cost will be the first priority. A large focus of the CAP will be dedicated to energy efficiency insofar as the AB 32 Scoping Plan identified energy efficiency as one of the four measures that accounts for 75% of GHG emission reductions in the State.

The CAP will be integrated in the Santa Barbara County Comprehensive General Plan Energy Element.

The Implementer will, at a minimum, track the following information through the IR Tool:

Development of the CAP will consider a menu of both standard and innovative measures and policies to be implemented such as:

- An energy efficiency report card for all businesses in the County,
- Develop an outreach program with the school districts to teach about energy efficiency,
- Provide incentives for the purchase of energy efficient equipment, lights, and appliances,
- Adopt an incentive-based residential and commercial green building policy and develop a green building code for those sectors,
- Provide incentives for energy standards greater than Title 24,
- Enhance the County's IBRP to include permit streamlining or other incentives,
- Other energy efficient measures identified through research.

These measures and policies will be implemented following adoption of the CAP. Included in the implementation of measures, programs, and policies in the CAP, the county will develop a monitoring program to track progress. A baseline to track progress will be developed using the greenhouse gas emissions inventory which currently being completed. The inventory will include emissions for the year 2007 which will be considered the baseline year. The inventory will include baseline measures for energy consumption for 2007 as well as emission estimates. The goal will be to reduce emissions, through many emission reduction measures including energy efficiency measures, back to 1990 levels or 15% from current levels. Estimates of reduction in energy consumption will be estimated through data

from the utility companies for the unincorporated county, through data gathered from California Energy Commission, and permit tracking.

Additionally, the County will pursue the ICLEI Milestone Awards for each of the five (5) milestones related to Climate Action Plans. The County will submit the annual reports to ICLEI to work towards the fifth reward for “Monitor Success”.

Implementer will provide all materials developed under this task to CPM for review and comment:

1. Report on Status of Consultant or Subcontractor to Support the Task
2. Plan for Energy Savings Analysis for GHG Inventory – Implementer shall include data collection process, including data collection templates if applicable and methodology for performing the analysis. Implementer may also include collaboration steps. This may be in the format of a memo report or full report.
3. Draft Report on the Results of the Analysis
4. Final Report on the Results of the Analysis
5. Monthly reports of tracked Performance Indicators

Task 3.C. - Deliverable(s)	Due Date(s)
1. Report on Status of Consultant or Subcontractor to Support the Task	NTP + 15 days
2. Plan for Energy Savings Analysis for GHG Inventory	NPT + 1 Month
3. Draft Report on the Results of the Analysis	NTP + 2 Months
4. Final Report on the Results of the Analysis	NTP + 3 Months
5. Monthly reports of tracked Performance Indicators	Monthly

Task 4 – Invoicing and Reporting

A. IR Tool: After SCE provides Implementer training on the IR Tool, the Implementer will utilize the IR Tool, which serves three primary purposes:

1. Enables Implementer to provide SCE with required Program information;
2. Provides CPM the capability to access Implementer’s Program information and create

- reports; and
3. Provides miscellaneous reporting support for SCE's internal and CPUC reporting requirements.

B. Submission of Information into IR Tool: Implementer will update the IR Tool on a monthly basis in accordance with requirements delineated in Appendix A (Monthly Invoicing and Reporting Requirements), attached hereto. Implementer will work collaboratively with the CPM in tailoring the flat files for the Program.

C. Monthly Invoicing and Reporting: All required monthly invoice reports can be generated via the IR Tool. Implementer will be responsible for implementing, adhering to, and the submission of, the items as described in Appendix A (Monthly Invoicing and Reporting Requirements) of this Statement of Work. The invoice reporting requirements may be amended from time to time, at which time SCE will notify Implementer of the changes and issue a new Appendix A. Implementer will implement these modifications in a timely manner and future invoice documentation will reflect them.

D. SCE's Regulatory Reporting: Implementer will implement, adhere to, and submit the items as described in Appendix B (Regulatory Reporting Requirements), attached hereto, as SCE requests. The CPUC reporting requirements may be amended from time to time, at which time SCE will notify Implementer of the changes and issue a new Appendix B. Implementer will implement these modifications in a timely manner and future invoice documentation will reflect them.

Implementer acknowledges that SCE may, in its sole discretion, require Implementer to provide such other reports or documentation that SCE deems appropriate or necessary ("Ad Hoc Reports"). Implementer will comply with any request for such Ad Hoc Report(s) within a reasonable time or, if applicable, within the time requested by SCE.

Deliverable(s)	Due Date(s)
1. Prepare and submit monthly invoices and supporting documentation to SCE	Monthly, by the 15th Calendar Day for Work completed the preceding month
2. Prepare and submit monthly regulatory report, including flat files and monthly deliverable work sheet.	Monthly, by the 15th Calendar Day for Work completed the preceding month
3. Prepare and submit Quarterly regulatory reports (Appendix B) to SCE	Quarterly, by the 30 th Calendar Day for Work completed the preceding quarter, through October 31, 2012
4. Prepare and submit Ad Hoc Reports	As SCE requests and/or requires
5. Prepare and submit final invoice and Program Report to SCE	March 10, 2013

Task 5 - Ramp-Down and Shut-Down Program

A. Program Ramp-Down: If there is a gap in Program services after October 15, 2012, Implementer will provide SCE with a ramp-down plan for the Program. To ensure complete Program shut-down, the Program ramp-down period will commence no later than September 1, 2012. Implementer’s plan for Program ramp-down will take into consideration that all services must be completed by October 15, 2012.

Implementer will resolve all outstanding Program and Partnership issues and begin preparation of the Final Report beginning September 1, 2012.

B. Program Shut-Down: Implementer will provide to the CPM a plan with procedures on shutting down the Program.

All Program operations will be completely shut down after the last day of the Contract effective period.

Deliverable(s)	Due Date(s)
1. Submit detailed ramp-down and shut-down plans and schedules to CPM for review and approval	No later than September 1, 2012
2. Resolve outstanding Program and Partnership issues and begin preparation of Final Report	No later than September 1, 2012
3. Begin Program ramp-down	No later than September 1, 2012

4. Complete all services	No later than October 15, 2012
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Task 6 - Submit Final Program Report

After Program shut-down and follow-up issues have been completed and resolved, the Implementer will submit a final report that reviews the Program’s progress and accomplishment (the “Final Report”). At a minimum, the Final Report will cover:

- A. Goal Attainment:** Documentation that substantiates the Implementer’s achievement of the objectives, Program Performance Indicators, and deliverables for the Contract.
- B. Program Achievement Discussion:** Were the goals/objectives met? Were the Program Performance Indicators achieved? Complete Program achievement for each Program Performance Indicator and deliverable indicating the measureable Program accomplishments.
- C. Program Challenges:** What were the significant obstacles that were overcome?
- D. Lessons Learned:** Could a Program of this scale have accomplished more?
- E. Program Improvement Recommendations:** What improvements could have been made to help the Program be even more successful?
- F. Program Next Step:** Should the Program a) be mainstreamed, b) continued to be developed or, c) ended.

Deliverable(s)	Due Date(s)
1. Submit draft Final Report for SCE review and approval	No later than October 1, 2012
2. Submit revised Final Report for SCE review and approval	The earlier of October 15, 2012 or within 2 weeks of SCE comments

SECTION 6: PAYMENT

PULL FROM ITEM E (“TOTAL BUDGET COST”) IN THE BIDDER’ S PROPOSAL CHECKLIST

- A. Payment Terms:** The Implementer Budget will utilize 100% time and material based payments (“T&M payments”). Payment of the T&M portion of Implementer’s budget will be based on receipt by SCE of the deliverables set forth herein. T&M payments will be in accordance with the Billing Rates set forth in Table 1, below and Appendix C (Billing Schedule). All payments will be subject to the Agreement and consistent

with the budget breakdown set forth herein. Payment will be based on meeting deliverables and due dates set forth in Section 5 of this Statement of Work.

B. Implementer Budget Limit: Under no event will Implementer exceed the total amount budgeted by SCE for this Agreement of **\$283,000**.

Table 1: Implementer T&M Fully Burdened Hourly Billing Rate

Implementer Job Function	Hourly Rate for years 2010-2012	% of Total Hours
	(\$/Hour)	
Senior Consultant	\$200	N/A
Deputy Director	124.84	1.22%
Supervising Planner	114.04	7.27%
Senior Planner	100.44	15.56%
Building and Safety Manager	96.77	6.99%
Associate Planner	88.03	39.37%
Accounting Support	61.65	1.3%
Program Manager	87.43	6.68%
Administrative Leader	74.66	15.72%
Department Business Specialist	65.73	5.89%
Average Rate		100%

Table 2: Implementers Budget Breakdown

Item	%	\$
1) Administration	6%	\$15,895
2) Marketing/Outreach Costs	7%	\$21,219
3) Direct Program Costs	87%	\$245,887
Total Implementer Budget: 1) + 2) + 3)	100%	\$283,000

SECTION 7: PERFORMANCE INDICATORS

SCE will, at a minimum, monitor the Work based on the following Program Performance Indicators:

- A. Progress made against the goals, deliverables, and due dates above; and

B. Actual performance versus predicted performance as outlined herein.

Appendix A: Monthly Invoicing and Reporting Requirements

A. Requirements

Monthly hard copy invoices are required at the 15th Calendar Day of each month for Work completed the preceding month with invoicing supporting files described herein. These invoices and supporting documents are for work performed by the Implementer and all Subcontractors.

On November 15, 2012 or sooner, Implementer will submit a final invoice associated with Program services that are tied directly to delivery of the Program deliverables (see Table 1, above). No additional Program services will be performed after October 15, 2012. Subsequent invoices will only contain expenses associated with closing out the Program (i.e., administration expenses, etc.) that are not directly tied to delivery of the Program goals.

B. Procedures

1. Implementer uploads their Customer flat files into the IR Tool. The IR Tool creates a draft invoice for Implementer's review.
2. CPM reviews the draft invoice and advises the Implementer to re-submit their invoice if requested. Implementer is required to submit the following files to SCE by the 15th Calendar Day of each month with each of their invoice submission:
 - Invoice – Hard Copy and electronic copy uploaded into the IR Tool;
 - Program Tracking Flat File – Uploaded electronically into the IR Tool;
 - Financial Flat File – Uploaded electronically into the IR Tool;
 - Monthly Narrative - Hard Copy with invoice submission;
 - Deliverable Table – Uploaded electronically;
 - Allowable Cost Table (see Appendix B) – Hard Copy with invoice submission; and
 - Supporting documentation – Uploaded electronically into the IR Tool.
3. Upon approval by CPM, the invoice is paid.

C. Monthly Narrative

The monthly narrative will include a discussion on the following Program activities occurring during the month:

- Administrative activities;
- Marketing activities;
- Direct Implementation activities;
- Implementer's assessment of Program performance and Program status (is the Program on target, exceeding expectations, or falling short of expectations, etc.);
- Discussion of changes in Program emphasis (new Program elements, less or more emphasis on a particular delivery strategy, Program elements discontinued, Measure discontinued, etc.);
- Discussion of near term plans for Program over the coming months (i.e., marketing and outreach efforts that are expected to significantly increase Program participation, etc.);
- Changes to staffing and staff responsibilities, if any;
- Changes to contacts, if any;
- Changes to Subcontractors and Subcontractor responsibilities, if any; and
- Number of Program complaints received.

Appendix B: Regulatory Reporting Requirements

1. Program Reporting

Implementer will provide SCE with the requisite information on the prior month's activities, accomplishments and expenditures related to its respective Work obligations, for purposes of preparing any reports required of SCE by the CPUC including Quarterly and Annual Reports. Requirements for these reports may change per the direction of the CPUC or the CPUC's Energy Division. The current reporting requirements are as follows:

2. Quarterly Report

Implementer will provide SCE with the requisite information to be compiled for the quarterly portfolio reporting.

2.1. Expenditures for the Program per cost; Section 4, below contains a list of allowable costs.

- a. CPUC authorized budget
- b. Operating Budget
- c. Total Expenditures
 - Administrative Cost
 - Marketing/Advertising/Outreach Costs
 - Direct Implementation Cost

2.2. Program Narratives – For the Program, a description of the Program activities occurring during the quarter.

- a. Administrative activities
- b. Marketing activities
- c. Direct Implementation activities
- d. Implementer's assessment of Program performance and Program status (is the Program on target, exceeding expectations, or falling short of expectations, etc.)
- e. Discussion of changes in Program emphasis (new Program elements, less or more emphasis on a particular delivery strategy, Program elements discontinued, Measure discontinued, etc.)
- f. Discussion of near term plans for Program over the coming months (i.e., marketing and outreach efforts that are expected to significantly increase Program participation, etc.)
- g. Changes to staffing and staff responsibilities, if any
- h. Changes to contacts, if any
- i. Changes to Subcontractors and Subcontractor responsibilities, if any
- j. Number of Program complaints received

2.3. Implementer will provide additional data or information as required by the CPUC.

3. Annual Reports

Implementer will provide SCE with the requisite information to be compiled for the annually portfolio reporting.

3.1. Expenditures for the Program per cost; Section 4, below contains a list of allowable costs.

- a. CPUC authorized budget
- b. Operating Budget
- c. Total Expenditures
 - Administrative Cost
 - Marketing/Advertising/Outreach Costs
 - Direct Implementation Cost

3.2. Program Narratives – For the Program, a description of the Program activities occurring during the year.

- a. Administrative activities
- b. Marketing activities
- c. Direct Implementation activities
- d. Implementer’s assessment of Program performance and Program status (is the Program on target, exceeding expectations, or falling short of expectations, etc.)
- e. Discussion of changes in Program emphasis (new Program elements, less or more emphasis on a particular delivery strategy, Program elements discontinued, etc.)
- f. Discussion of near term plans for Program over the coming months (i.e., marketing and outreach efforts that are expected to significantly increase Program participation, etc.)
- g. Changes to staffing and staff responsibilities, if any
- h. Changes to contacts, if any
- i. Changes to Subcontractors and Subcontractor responsibilities, if any
- j. Number of Partnership complaints received

3.3. Implementer will provide additional data or information as required by the CPUC.

4. Allowable Costs

Allowable Costs Table	
<p>The cost items listed on the Allowable Costs sheet are the only costs that can be claimed for ratepayer- funded energy efficiency work. The costs reported should be only for costs actually expended. Any financial commitments are to be categorized as commitments. If the reporting entity does not have a cost as listed on the cost reporting sheet, then no cost is to be reported for that item. These Allowable Cost elements are to be used whenever costs are invoiced or reported to the CPM. If there is a desire to include additional Allowable Cost elements, the CPM should be contacted in order to seek approval from the CPUC.</p>	
	3/30/2006
Cost Categories	Allowable Costs
Administrative Cost Category	
	Managerial and Clerical Labor
	Implementer Labor - Clerical
	Implementer Labor - Program Design
	Implementer Labor - Program Development
	Implementer Labor - Program Planning
	Implementer Labor - Program/Project Management
	Implementer Labor - Staff Management
	Implementer Labor - Staff Supervision
	Human Resource Support and Development
	Implementer Labor- Human Resources
	Implementer Labor - Staff Development and Training
	Implementer Benefits - Administrative Labor
	Implementer Benefits - Direct Implementation Labor
	Implementer Benefits - Marketing/Advertising/Outreach Labor
	Implementer Payroll Tax - Administrative Labor
	Implementer Payroll Tax - Direct Implementation Labor
	Implementer Payroll Tax - Marketing/Advertising/Outreach Labor
	Implementer Pension - Administrative Labor
	Implementer Pension - Direct Implementation Labor
	Implementer Pension - Marketing/Advertising/Outreach Labor
	Travel and Conference Fees
	Implementer - Conference Fees
	Implementer Labor - Conference Attendance
	Implementer - Travel - Airfare
	Implementer - Travel - Lodging
	Implementer - Travel - Meals
	Implementer - Travel - Mileage
	Implementer - Travel - Parking
	Implementer - Travel - Per Diem for Misc. Expenses
	Overhead (General and Administrative) - Labor and Materials
	Implementer Equipment Communications
	Implementer Equipment Computing
Implementer Equipment Document Reproduction	

Allowable Costs Table	
<p>The cost items listed on the Allowable Costs sheet are the only costs that can be claimed for ratepayer- funded energy efficiency work. The costs reported should be only for costs actually expended. Any financial commitments are to be categorized as commitments. If the reporting entity does not have a cost as listed on the cost reporting sheet, then no cost is to be reported for that item. These Allowable Cost elements are to be used whenever costs are invoiced or reported to the CPM. If there is a desire to include additional Allowable Cost elements, the CPM should be contacted in order to seek approval from the CPUC.</p>	
	3/30/2006
Cost Categories	Allowable Costs
	Implementer Equipment General Office
	Implementer Equipment Transportation
	Implementer Food Service
	Implementer Office Supplies
	Implementer Postage
	Implementer Labor - Accounting Support
	Implementer Labor - Accounts Payable
	Implementer Labor - Accounts Receivable
	Implementer Labor - Facilities Maintenance
	Implementer Labor - Materials Management
	Implementer Labor - Procurement
	Implementer Labor - Shop Services
	Implementer Labor - Administrative
	Implementer Labor - Transportation Services
	Implementer Labor - Automated Systems
	Implementer Labor - Communications
	Implementer Labor - Information Technology
	Implementer Labor - Telecommunications
Marketing/Advertising/Outreach Cost Category	
	Implementer - Bill Inserts
	Implementer - Brochures
	Implementer - Door Hangers
	Implementer - Print Advertisements
	Implementer - Radio Spots
	Implementer - Television Spots
	Implementer - Website Development
	Implementer Labor - Marketing
	Implementer Labor - Media Production
	Implementer Labor - Business Outreach
	Implementer Labor - Customer Outreach
	Implementer Labor - Customer Relations
Direct Implementation Cost Category	
	Financial Incentives to Customers
	Activity - Direct Labor
	Implementer Labor - Facilities Audits
	Implementer Labor - Curriculum Development
	Implementer Labor - Customer Education and Training
	Implementer Labor - Customer Equipment Testing and Diagnostics
	Installation and Service – Labor

Allowable Costs Table	
<p>The cost items listed on the Allowable Costs sheet are the only costs that can be claimed for ratepayer- funded energy efficiency work. The costs reported should be only for costs actually expended. Any financial commitments are to be categorized as commitments. If the reporting entity does not have a cost as listed on the cost reporting sheet, then no cost is to be reported for that item. These Allowable Cost elements are to be used whenever costs are invoiced or reported to the CPM. If there is a desire to include additional Allowable Cost elements, the CPM should be contacted in order to seek approval from the CPUC.</p>	
	3/30/2006
Cost Categories	Allowable Costs
	Implementer Labor - Customer Equipment Repair and Servicing
	Implementer Labor - Customer Equipment Repair and Servicing
	Direct Implementation Hardware and Materials
	Implementer - Direct Implementation Literature
	Implementer - Education Materials
	Implementer - Energy Measurement Tools
	Implementer - Installation Hardware
	Implementer -Audit Applications and Forms
	Rebate Processing and Inspection – Labor and Materials
	Implementer Labor - Field Verification
	Implementer Labor - Rebate Processing
	Implementer - Rebate Applications

Appendix C: Billing Schedule (Updated During Negotiations)



Santa Barbara
Appendix C Billing Tab

Appendix C - Billing Table

Instructions: Please fill in items in yellow.		Implementer Costs		Subcontractor Costs ²	Total Program Cost
Sub-Task	Labor ¹	Expenses ²	Labor & Expenses		
Task 1 - Program Ramp-up	Included in Task 2 through Task 4				
Task 1 (Not-to-Exceed Budget)					
Task 2 - Strategic Plan Goal 1					
A. Adopt building energy codes more stringent than Title 24's requirements 96.77	1.1.1	\$12,146	\$0	\$6,667	\$18,813
A.1. Report on Status of Consultant or Subcontractor to Support the Task.		\$194	\$0	\$0	\$194
A.2. Reach Code Assessment and Planning Report		\$968		\$6,667	\$7,635
A.3. Draft Code and Ordinance Amendment		\$4,422			\$4,422
A.4. Report on Stakeholder Input: Code and Ordinance Amendment		\$4,128			\$4,128
A.5. Final Code and Ordinance Amendment		\$258			\$258
A.6. Submit Code and Ordinance Amendment to Board of Supervisors for adoption		\$968			\$968
A.7. Submit Code to CEC for Approval Under Section 10-106		\$258			\$258
A.8. Monthly reports of tracked Performance Indicators		\$950			\$950
B. Adopt a Green Building policy for municipal development, commercial development and/or residential development	1.1.2	\$9,865	\$1,000	\$3,333	\$14,198
B.1. Green Building Ordinance Assessment and Planning Report		\$484		\$3,333	\$3,817
B.2. Draft Green Building Ordinance		\$6,229	\$1,000		\$7,229
B.3. Report on Stakeholder Input: Green Building Ordinance		\$2,064			\$2,064
B.4. Final Green Building Ordinance		\$129			\$129
B.5. Submit Green Building Ordinance/Program to Board of Supervisors for		\$484			\$484

adoption					
B.6. Monthly reports of tracked Performance Indicators		\$475			\$475
C. Develop and adopt programs to encourage energy efficiency such as one-stop permitting, on-line permitting, separate Zero Net Energy permit processes, density bonuses, or recognition program	1.1.5	\$74,845	\$10,253	\$0	\$85,098
C.1. Report on Status of Consultant or Subcontractor to Support the Task.		\$176			\$176
C.2. Assessment and Planning Report for the Development of a Program That Encourages Energy Efficiency		\$29,300	\$10,253		\$39,553
C.3. Review Documents Developed During Program Implementation		\$5,406			\$5,406
C.4. Monthly Reports on Outreach and Education Efforts		\$3,760			\$3,760
C.5. Plan for Sharing Lessons Learned/Best Practices With Other Local Governments.		\$1,507			\$1,507
C.6. Implement newly expanded IBRP in place including linkage with new emPowerSBC program		\$33,724			\$33,724
C.7. Monthly reports of tracked Performance Indicators			\$973		
Task 2 (Not-to-Exceed Budget)		\$96,855	\$11,253	\$10,000	\$118,108

Task 3 - Strategic Plan Goal 4					
A. Customize CAP with energy efficiency language and data	4.1.2	\$115,029	\$4,000	\$0	\$119,029
A.1. Report on Status of Consultant or Subcontractor to Support the Task		\$440.15			\$440.15
A.2. Draft CAP		\$81,158.70	\$1,000.00		\$82,158.70
A.3. Report on Stakeholder Input		\$704.24			\$704.24
A.4. Final CAP		\$24,498.40	\$3,000.00		\$27,498.40
A.5. Submit CAP to Board of Supervisors for adoption		\$2,901.00			\$2,901.00
A.6. Monthly reports of tracked Performance Indicators		\$5,326.25			\$5,326.25
B. Update General Plan with CAP. Provide energy efficiency framework and data for other people doing planning	4.1.3	\$10,778	\$0	\$0	\$10,778
B.1. Report on Status of Consultant or Subcontractor to Support the Task		\$440.15			\$440.15
B.2. Updated General Plan with Climate policies		\$8,753.00			\$8,753.00
B.3. Submit Updated General Plan to Board of Supervisors for adoption		\$880.30			\$880.30
B.4. Report on Dissemination of Lessons Learned/Best Practices to Other Municipalities		\$704.24			\$704.24
C. Conduct the energy efficiency savings analysis for an annual Greenhouse Gas inventory for the City	4.1.4	\$4,085	\$0	\$31,000	\$35,085

C.1. Report on Status of Consultant or Subcontractor to Support the Task		\$880.30			\$880.30
C.2. Plan for Energy Savings Analysis for GHG Inventory		\$528.18		\$20,000.00	\$20,528.18
C.3. Draft Report on the Results of the Analysis		\$440.15		\$6,000.00	\$6,440.15
C.4. Final Report on the Results of the Analysis		\$440.15		\$5,000.00	\$5,440.15
C.5. Monthly reports of tracked Performance Indicators		\$1,796.16			\$1,796.16
Task 3 (Not-to-Exceed Budget)		\$129,891	\$4,000	\$31,000	\$164,891

Task 4 - Invoicing and Reporting	Included in Task 2 through Task 3				
Task 4 (Not-to-Exceed Budget)					

Task 5 - Ramp-Down and Shut-Down Program	Included in Task 2 through Task 3				
Task 5 (Not-to-Exceed Budget)					

Task 6 - Submit Final Program Report	Included in Task 2 through Task 3				
Task 6 (Not-to-Exceed Budget)					

Grand Total (All Tasks)	All	\$226,747	\$15,253	\$41,000	\$283,000
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Notes:

- 1) **Labor:** Implementer shall invoice SCE at the fixed hourly rates for the applicable labor categories stated in the Contract for time spent directly engaged in performance of the Work by Implementer’s employees. Such fixed hourly rates shall be inclusive of all of Implementer’s overhead costs (including all taxes and insurance), administrative and general fees, and profit.
- 2) **Expenses:** All reimbursable expenses shall be authorized by SCE in writing prior to the expenditure. Any expenses not so approved by SCE shall not be reimbursed. All expenses shall be charged at cost, without mark-up, and shall be necessary, reasonable and ordinary.
 - a) **Material Costs:** Material costs shall be substantiated with an invoice stating the unit price, quantity, and other information as required to identify the Work.
 - b) **Subcontract Labor Costs:** Subcontracted Work shall be charged at the hourly rates actually paid by Implementer, not to exceed the hourly rates set forth in the Contract for Work performed by the Implementer. Implementer shall provide Subcontractor invoices for any Implementer's invoice that includes Subcontractor costs.
 - c) **Out-of Pocket expenses:** Miscellaneous costs such as telephone communications, routine copying, electronic mail, facsimiles, computer time and in-house technical software are deemed to be included in Implementer’s overhead costs will not be reimbursed.

d) Travel Costs: Approved air travel costs shall in no case exceed economy or coach fare, whichever is reasonably available. Automobile travel from Implementer's office to the Jobsite and to SCE's general offices shall be paid at the fixed mileage rate stated in the Contract, or if not stated, at SCE's rate for SCE employees.

- 3) Budget Changes: Changes in the Not to Exceed Budget for Tasks highlighted in grey require a change order.**
- 4) Budget Changes: Changes in the Budget for all other Tasks require written authorization from the CPM.**