

2002 - 2003 Energy Efficiency Program Activities Quarterly Reports Worksheet

Rita Norton & Associates, LLC

South Bay Communities and Affiliates Energy Savings Program

182 AB 02

Residential Education/Financial Incentive Program

A - Unit Based Implementation Activities WITH Measurable Energy Savings								
Line Item #	MEASURE DESCRIPTION / ACTIVITY DESCRIPTION (Specify Units if Necessary)	TOTAL PRODUCT OR SERVICE REBATE PAID PER UNIT	DEMAND REDUCTION PER UNIT (kW)	ESTIMATED ANNUAL HOURS OF OPERATION PER UNIT	ANNUAL ENERGY SAVINGS PER UNIT		EUL	GROSS IMC PER UNIT
					kWh	Therms		
T3 - 1	Window AC Unit	\$50.00	0.1500	1,800	270		10.0	\$390.00
T3 - 2	Programmable Thermostat (AC)	\$20.00		5,040	586		11.0	\$140.00
T3 - 3	Ceiling Fans	\$20.00	0.1080	2,190	237		10.0	\$180.00
T3 - 4	Single Family Lighting CFL's	\$2.00	0.0470	1,460	69		8	\$4.00
T3 - 5								
T3 - 6								
T3 - 7								
T3 - 8	2' 1 lamp T-12 / 2' 1 lamp T-8, elec ballast	\$ 15.50	0.0080	5,660	45		16	\$36.00
T3 - 9	2' 2 lamp T-12 / 2' 2 lamp T-8, elec ballast	\$ 23.50	0.0230	5,660	130		16	\$39.50
T3 - 10	2' 2 lamp T-12 U-tube / 2' 2 lamp T-8, U-Tube, elec ballast	\$ 19.00	0.0200	5,660	113		16	\$54.50
T3 - 11	2' 2 lamp T-12 U-tube / 2' 2 lamp T-8, Reflector, elec ballast	\$ 37.50	0.0390	5,660	221		16	\$58.50
T3 - 12	2' 2 lamp T-8 U-tube "2-FB31T8" / 2' 2 lamp T8 existing ballast, REF "2-F17/741 EXISTING ballast, reflector"	\$ 22.50	0.0290	5,660	164		16	\$43.00
T3 - 13	3' 1 lamp T-12 / 3' 1 lamp T-8, elec ballast	\$ 15.50	0.0240	5,660	136		16	\$37.00
T3 - 14	3' 2 lamp T-12 / 3' 2 lamp T-8, elec ballast	\$ 23.50	0.0140	5,660	79		16	\$42.00
T3 - 15	3' 3 lamp T-12 / 3' 3 lamp T-8, elec ballast	\$ 35.50	0.0400	5,660	226		16	\$52.00
T3 - 16	3' 4 lamp T-12 / 3' 4 lamp T-8, elec ballast	\$ 42.50	0.0340	5,660	192		16	\$59.00
T3 - 17	4' 1 lamp T-12 / 4' 1 lamp T-8-Low Power	\$ 15.50	0.0160	5,660	91		16	\$35.00
T3 - 18	4' 1 lamp T-12 / 4' 1 lamp High Performance GE ULTRAMAX Low Power Watt-Miser	\$ 18.00	0.0200	5,660	113		16	\$38.50
T3 - 19	4' 1 lamp T-12 / 4' 1 lamp T-8-Tandem-wire Low Power	\$ 16.50	0.0175	5,660	99		16	\$23.00
T3 - 20	4' 1 lamp T-12 / 4' 1 lamp High Performance GE ULTRAMAX tandem-wire Low Power Watt-Miser	\$ 19.00	0.0200	5,660	113		16	\$32.00
T3 - 21	4' 2 lamp T-12 / 4' 2 lamp T-8-Low Power	\$ 23.50	0.0210	5,660	119		16	\$38.00
T3 - 22	4' 2 lamp T-12 / 4' 2 lamp High Performance GE ULTRAMAX Low Power/Watt-Miser ballast/lamp	\$ 26.50	0.0260	5,660	147		16	\$42.50
T3 - 23	4' 2 lamp T-12 / 4' 2 lamp T-8-tandem-wire Low Power	\$ 20.00	0.0210	5,660	119		16	\$29.00
T3 - 24	4' 2 lamp T-12 / 4' 2 lamp tandem-wire High Performance GE ULTRAMAX Low Power/Watt-Miser ballast/lamp	\$ 22.50	0.0280	5,660	158		16	\$33.50
T3 - 25	4' 2 lamp T-12 / 4' 1 lamp T-8, reflector, elec ballast	\$ 39.00	0.0410	5,660	232		16	\$53.00
T3 - 26	4' 3 lamp T-12 / 4' 3 lamp T-8 Low Power, elec ballast	\$ 35.50	0.0370	5,660	209		16	\$45.00
T3 - 27	4' 3 lamp T-12 / 4' 3 lamp High Performance GE ULTRAMAX Low Power/Watt-Miser ballast/lamp	\$ 40.50	0.0480	5,660	272		16	\$51.50
T3 - 28	4' 3 lamp T-12 / 4' 2 lamp T-8, reflector, elec ballast	\$ 52.00	0.0570	5,660	323		16	\$59.50
T3 - 29	4' 3 lamp T-12 / 4' 2 lamp High Performance GE ULTRAMAX Watt-Miser ballast/lamp, reflector	\$ 55.50	0.0930	5,660	526		16	\$64.50
T3 - 30	4' 4 lamp T-12 / 4' 4 lamp T-8 Low Power, elec ballast	\$ 42.50	0.0460	5,660	260		16	\$51.00
T3 - 31	4' 4 lamp T-12 / 4' 4 lamp High Performance GE ULTRAMAX Low Power Watt-Miser ballast/lamp	\$ 49.50	0.0560	5,660	317		16	\$59.00
T3 - 32	4' 4 lamp T-12 / 4' 2 lamp T-8, reflector, elec ballast	\$ 50.00	0.0860	5,660	487		16	\$60.00
T3 - 33	4' 4 lamp T-12 / 4' 2 lamp High Performance GE ULTRAMAX Watt-Miser, ballast/lamp, reflector	\$ 52.50	0.0930	5,660	526		16	\$65.00
T3 - 34	4' 4 lamp T-8 / 4' 2 lamp exstg blst, reflector	\$ 32.00	0.0380	5,660	215		16	\$45.00
T3 - 35	6' 1 lamp T-12 / 3' 2 lamp T-8, KIT, elec ballast	\$ 19.00	0.0200	5,660	113		16	\$69.00
T3 - 36	6' 2 lamp T-12 / 3' 4 lamp T-8, KIT, elec ballast	\$ 34.00	0.0360	5,660	204		16	\$95.00
T3 - 37	6' 2 lamp T-12 HO / 3' 4 lamp T-8, KIT, high ballast factor ballast	\$ 93.50	0.0980	5,660	555		16	\$125.50
T3 - 38	8' 1-8' lamp T-12 / 4' 2 lamp T-8, KIT-Low Power, elec ballast	\$ 26.00	0.0300	5,660	170		16	\$75.00
T3 - 39	8' 1-8' lamp T-12 / 4' 2 lamp High Performance GE ULTRAMAX Low Power/Watt-Miser ballast/lamp KIT	\$ 28.50	0.0350	5,660	198		16	\$79.00
T3 - 40	8' 2-4' lamp T-12 / 4' 2 lamp T-8-LP, elec ballast	\$ 20.00	0.0210	5,660	119		16	\$45.50
T3 - 41	8' 2-4' lamp T-12 / 4' 2 lamp High Performance GE ULTRAMAX Low Power/Watt-Miser ballast/lamp	\$ 22.50	0.0260	5,660	147		16	\$50.50
T3 - 42	8' 2-8' lamp T-12 / 4' 4 lamp T-8, KIT Low Power, elec ballast	\$ 37.50	0.0250	5,660	142		16	\$87.00
T3 - 43	8' 2-8' lamp T-12 / 4' 4 lamp High Performance GE ULTRAMAX Low Power/Watt-Miser ballast/lamp KIT	\$ 44.50	0.0350	5,660	198		16	\$95.50
T3 - 44	8' 2-8' lamp T-12 / 4' 2 lamp T-8, reflector Low Power, elec ballast	\$ 61.50	0.0650	5,660	368		16	\$76.00
T3 - 45	8' 2-8' lamp T-12 / 4' 2 lamp High Performance GE ULTRAMAX Watt-Miser ballast/lamp, reflector	\$ 64.50	0.0720	5,660	408		16	\$80.50
T3 - 46	8' 3 lamp T-12 / 4' 6 lamp T-8, KIT, elec ballast	\$ 28.00	0.0290	5,660	164		16	\$127.00
T3 - 47	8' 3 lamp T-12 / 4' 4 lamp T-8, reflector, elec ballast	\$ 69.00	0.0730	5,660	413		16	\$88.00
T3 - 48	8' 4-4' lamp T-12 / 4' 4 lamp T-8-Low Power, elec ballast	\$ 43.00	0.0460	5,660	260		16	\$56.50

T3 - 49	8' 4-4' lamp T-12 / 4' 4 lamp High Performance GE ULTRAMAX Low Power/Watt-Miser ballast/lamp	\$	50.00	0.0560	5,660	317	16	\$64.50
T3 - 50	8' 4-8' lamp T-12 / 4' 8 lamp T-8, KIT, elec ballast	\$	40.00	0.0420	5,660	238	16	\$138.50
T3 - 51	8' 4-8' lamp T-12 / 4' 6 lamp T-8, reflector, elec ballast	\$	66.00	0.0690	5,660	391	16	\$129.00
T3 - 52	8' 1 lamp T-12 High Output / 4' 2 lamp T-8, reflector, elec ballast	\$	51.50	0.0540	5,660	306	16	\$81.00
T3 - 53	8' 1 lamp T-12 HO / 4' 2 lamp High Performance GE ULTRAMAX Watt-Miser ballast/lamp, reflector	\$	55.00	0.0610	5,660	345	16	\$85.50
T3 - 54	8' 2 lamp T-12 HO / 4' 4 lamp T-8, reflector, elec ballast	\$	72.00	0.0950	5,660	538	16	\$88.50
T3 - 55	8' 2 lamp T-12 HO / 4' 4 lamp High Performance GE ULTRAMAX Watt-Miser ballast/lamp, reflector	\$	78.00	0.1090	5,660	617	16	\$96.50
T3 - 56	8' 3 lamp T-12 HO / 4' 6 lamp T-8, reflector, elec ballast	\$	111.50	0.1420	5,660	804	16	\$118.50
T3 - 57	25 watt / 9W CFL screw-in	\$	16.50	0.0140	5,660	79	16	\$20.50
T3 - 58	25 watt / 9W CFL NEW FIX	\$	41.50	0.0140	5,660	79	16	\$69.50
T3 - 59	40 watt / 11W CFL screw-in	\$	16.50	0.0260	5,660	147	16	\$20.50
T3 - 60	40 watt / 11W CFL NEW FIX	\$	41.50	0.0260	5,660	147	16	\$69.50
T3 - 61	60 watt / 13W CFL screw-in	\$	16.50	0.0430	5,660	243	16	\$20.50
T3 - 62	60 watt / 13W CFL NEW FIX	\$	41.50	0.0430	5,660	243	16	\$69.50
T3 - 63	75 watt / 18W CFL screw-in	\$	16.50	0.0510	5,660	289	16	\$20.50
T3 - 64	75 watt / 18W CFL NEW FIX	\$	41.50	0.0510	5,660	289	16	\$69.50
T3 - 65	100 watt / 26W CFL screw-in	\$	18.50	0.0690	5,660	391	16	\$22.50
T3 - 66	100 watt / 26W CFL NEW FIX	\$	52.00	0.0690	5,660	391	16	\$79.50
T3 - 67	150 watt / 42W CFL screw-in	\$	27.50	0.1020	5,660	577	16	\$33.50
T3 - 68	150 watt / 39W CFL NEW FIX	\$	63.00	0.1050	5,660	594	16	\$90.50
T3 - 69	200 watt / 50W HPS NEW FIX	\$	89.00	0.1340	5,660	758	16	\$121.50
T3 - 70	200 watt / 50W MH NEW FIX	\$	89.00	0.1280	5,660	724	16	\$267.50
T3 - 71	300 watt / 70W HPS NEW FIX	\$	99.50	0.2050	5,660	1,160	16	\$132.00
T3 - 72	300 watt / 70W MH NEW FIX	\$	99.50	0.2050	5,660	1,160	16	\$140.00
T3 - 73	300 watt / 32W CFL floodlight	\$	119.50	0.2680	5,660	1,517	16	\$175.50
T3 - 74	500 watt / 100W HPS NEW FIX	\$	103.50	0.3720	5,660	2,106	16	\$117.50
T3 - 75	500 watt / 150W MH NEW FIX	\$	126.50	0.3150	5,660	1,783	16	\$226.00
T3 - 76	1000 watt / 200W HPS NEW FIX	\$	142.00	0.7550	5,660	4,273	16	\$267.50
T3 - 77	1000 watt / 250W MH NEW FIX	\$	147.00	0.7060	5,660	3,996	16	\$269.50
T3 - 78	1500 watt / 400W HPS NEW FIX	\$	172.50	1.0330	5,660	5,847	16	\$301.00
T3 - 79	1500 watt / 400W MH NEW FIX	\$	172.50	1.0420	4,380	4,564	16	\$353.00
T3 - 80	MV 50 watt / 35W HPS	\$	29.00	0.0310	5,660	175	16	\$42.50
T3 - 81	MV 50 watt / 26W CFL	\$	20.00	0.0430	5,660	243	16	\$25.00
T3 - 82	MV 75 watt / 50W HPS	\$	82.00	0.0290	5,660	164	16	\$136.00
T3 - 83	MV 75 watt / 50W MH	\$	82.00	0.0260	5,660	147	16	\$177.00
T3 - 84	MV 100 watt / 50W HPS	\$	82.00	0.0610	5,660	345	16	\$136.00
T3 - 85	MV 100 watt / 50W MH	\$	82.00	0.0580	5,660	328	16	\$177.00
T3 - 86	MV 150 watt / 50W HPS	\$	82.00	0.1110	5,660	628	16	\$136.00
T3 - 87	MV 150 watt / 50W MH	\$	82.00	0.1080	5,660	611	16	\$177.00
T3 - 88	MV 175 watt / 100W HPS	\$	102.00	0.0770	5,660	436	16	\$160.00
T3 - 89	MV 175 watt / 100W MH	\$	102.00	0.0750	5,660	425	16	\$169.50
T3 - 90	MV 250 watt / 150W HPS	\$	110.50	0.1010	5,660	572	16	\$153.00
T3 - 91	MV 250 watt / 175W MH	\$	116.50	0.0770	5,660	436	16	\$120.50
T3 - 92	MV 250 watt / 2 lamp 42W CFL wallpack	\$	114.00	0.2060	5,660	1,166	16	\$121.50
T3 - 93	MV 400 watt / 250W HPS	\$	130.00	0.1600	5,660	906	16	\$185.00
T3 - 94	MV 400 watt / 250W MH	\$	130.00	0.1610	5,660	911	16	\$135.50
T3 - 95	MV 700 watt / 400W HPS	\$	142.00	0.3130	5,660	1,772	16	\$184.00
T3 - 96	MV 700 watt / 400W MH	\$	142.00	0.3220	5,660	1,823	16	\$142.50
T3 - 97								
T3 - 98								
T3 - 99	MV 1000 watt / 600W HPS	\$	203.50	0.3800	5,660	2,151	16	\$470.00
T3 - 100	EXIT LED, AC only / LED	\$	36.00	0.0380	5,660	215	16	\$62.00
T3 - 101	EXIT LED, w/ battery or dual circuit / LED, BBU/2CKT	\$	36.00	0.0370	5,660	209	16	\$83.00

B - Unit Based Implementation Activities WITHOUT Measurable Energy Savings

Line Item #	ACTIVITY DESCRIPTION	COST PER ACTIVITY	Number of Units					
			PROGRAM UNIT GOALS	Q2 2002 (Apr - Jun)	Q3 2002 (Jul - Sep)	Q4 2002 (Oct - Dec)	Q1 2003 (Jan - Mar)	Q2 2003 (Apr - Jun)
T4.1 - 1	Residential Self Energy Audit ("Educational intervention" information)		4,154					255
T4.1 - 2	Energy Workshop Program Master Tool Kit and Training Community Training Module***		1				1	
T4.1 - 3	Energy Seminars - Multi-Family Dwelling Program		4					3
T4.1 - 4	Energy Education Presentations***		50					32
T4.1 - 5	Project Displays (Design & Production)***		2				2	
T4.1 - 6	SBER Project Web Site and "Calendar of the Year" Development and Launch***		1				1	

T4.1 - 7	CABLE Television Public Service Announcement (Energy Star AD w/SBER voice-over Production)***		1						1
T4.1 - 8	Public Service Announcement for SBER Program and Retailer - Radio: 30 second spot (Production)***		1					1	1
T4.1 - 9	Print Advertisements announcing Retailer (Design the Template and Content)		1				1		
T4.1 - 10	Print Advertisements announcing SBER Program (Design Template & Content)		1				1	1	
T4.1 - 11	Bill Insert Design (Design Templates and Content)***		1					1	1
T4.1 - 12	Mayoral Endorsement Letter (Templates & Content)***		3			2		1	
T4.1 - 13	Special Event In-Store Easel Exhibits (Design & Production)***		1					1	
T4.1 - 14	Special Event Banners (design & production)***		1					1	1
T4.1 - 15	Special Event Hand-Outs (design & production)***		1					2	
T4.1 - 16	SBER Program Tri-Fold Brochure (Design & Production)***		1			1		1	
T4.1 - 17	Newsletter Insert (Design Template)***		1			1			
T4.1 - 18	Newsletter Insert (Copy/Content for Articles)		5			3		5	
T4.1 - 19	Special Events to be Held***		8					4	6
T4.1 - 20	SBER Announcements at Community Meetings***		60			9		28	10
T4.1 - 21									
T4.1 - 22									
T4.1 - 23									
T4.1 - 24									
T4.1 - 25									
T4.1 - 26									
T4.1 - 27									
T4.1 - 28									
T4.1 - 29									
T4.1 - 30									
T4.1 - 31									
T4.1 - 32									
T4.1 - 33									
T4.1 - 34									
T4.1 - 35									
T4.1 - 36									
T4.1 - 37									
T4.1 - 38									

C - Task Based Implementation Activities (activities not quantifiable by unit and without measurable energy savings)

Line Item #	ACTIVITY DESCRIPTION	COST PER ACTIVITY	ESTIMATED COMPLETION DATE (mm/dd/yy)	Work Product				
				Percent Complete by Quarter (cumulative)				
				Q2 2002 (Apr - Jun)	Q3 2002 (Jul - Sep)	Q4 2002 (Oct - Dec)	Q1 2003 (Jan - Mar)	Q2 2003 (Apr - Jun)
T4.2 - 1	SBER MFD Contractor Program Manual	\$32,500.00	09/15/02		100			
T4.2 - 2	Point of Sale Coupon Planning Report	\$5,000.00	10/15/02		70	100		
T4.2 - 3	Point of Sale Coupon Retailer Manual	\$5,000.00	11/15/02		60	100		
T4.2 - 4	SBER Community Workshop Program Tool Kit	\$9,500.00	02/15/03		25	50	100	
T4.2 - 5	Project & General administration:		03/30/04	13	26	39	52	65
T4.2 - 6	Execute agreements with subcontractor: ASW Engineering Management Consultants (ASW)		10/15/02	25	90	100		
T4.2 - 7	Execute agreements with subcontractor: Energy Innovation, LLC (EIC)		10/15/02	25	90	100		
T4.2 - 8	Execute agreements with subcontractor: South Bay Cities Council of Governments (SBCCOG)		10/15/02	25	90	100		
T4.2 - 9	Execute agreements with subcontractor: Geltz Communications (Geltz)		10/31/02	25	50	100		
T4.2 - 10	Finalize performance measures and reimbursement		09/30/02		100			
T4.2 - 11	Establish Relationship with Energy Star		10/31/02			100		
T4.2 - 12	Energy Star Partnership Approved		10/1/02			100		
T4.2 - 13	Establish protocols for Project Decision-making		09/30/02		100			
T4.2 - 14	Establish Financial Agreements with Subcontractor ASW		10/15/02		90	100		
T4.2 - 15	Establish Financial Agreements with Subcontractor EIC		10/15/02		90	100		
T4.2 - 16	Establish Financial Agreements with Subcontractor SBCCOG		10/15/02		90	100		
T4.2 - 17	Establish Financial Agreements with Subcontractor Geltz		10/31/02		50	100		
T4.2 - 18	Establish organizational structure within the Participating Cities of South Bay		9/30/02		100			
T4.2 - 19	Oversee selection of SBCCOG Staff and Office		10/15/02		75	100		
T4.2 - 20	Over-see Design of the marketing program - SBER Theme and Message		3/30/03		50	75	100	
T4.2 - 21	Finalize eligible EEM (measures and products)		9/30/02		100			
T4.2 - 22	Develop package to solicit retailers		9/30/02		100			
T4.2 - 23	Recruit participation of local retailers		1/31/03		50	75	100	
T4.2 - 24	Receive completed retailer participation agreements		1/31/03		50	75	100	
T4.2 - 25	Participating Retailers Training Manual		10/9/02		90	100		

T4.2 - 26	Document feasibility of SFD - Coupon element and recommendations	12/31/02	75	100			
T4.2 - 27	Ensure coordination between MFD and SFD activities and outreach	12/31/03	17	34	51	68	
T4.2 - 28	Establish invoice/payment for financial incentives to mid-stream (Retailers)	9/30/02	100				
T4.2 - 29	File Monthly and Quarterly Reports	4/1/04					
T4.2 - 30	Remit (or withhold) monthly and quarterly payments to subcontractors (Direct and Indirect Expenses)	4/1/04		17	34	51	
T4.2 - 31	Providing training and services as needed to retailers and subcontractors	12/31/03	75	25	65	100	
T4.2 - 32							
T4.2 - 33							
T4.2 - 34							
T4.2 - 35							
T4.2 - 36							
T4.2 - 37							
T4.2 - 38							

D - Unit Based marketing Activities

Line Item #	ACTIVITY DESCRIPTION	PROGRAM UNIT GOALS	Number of Units					
			Number of units for which activities are completed					
			Q2 2002 (Apr - Jun)	Q3 2002 (Jul - Sep)	Q4 2002 (Oct - Dec)	Q1 2003 (Jan - Mar)	Q2 2003 (Apr - Jun)	Q3 2003 (Jul - Sep)
T5.1 - 1	Track "Hits" to SBER Web Site -- Goals	10,000				14,724	16,076	14,497
T5.1 - 2	Mayors' Endorsement Letter - Distribution Goals	10,000					2,750	
T5.1 - 3	Bill Insert -- Distribution Goals	10,000				47,500		
T5.1 - 4	Newsletter Insert Distribution	5			2	5	3	1
T5.1 - 5	CABLE Television Public Service Announcement (Energy Star AD w/SBER voice-over) - AIRING Target***	40,000						
T5.1 - 6	Public Service Announcement for SBER Program and Retailer - Radio: 30 second spot. AIRING Target ***	TBD						
T5.1 - 7	Print Advertisements announcing Retailer and SBER Publication (run) ***	TBD				1,336,209		
T5.1 - 8	SBER Program Tri-Fold Brochure -- Distribution	500				789	529	300
T5.1 - 9	Project Displays to be used / displayed in Conjunction with Events and Presentations	34				12	4	8
T5.1 - 10	Special Events: Banners, Hand-outs, In-Store Easels to be distributed and/or displayed in conjunction with Events	2,500				5,511	1,258	13
T5.1 - 11	Special "Reports" to Publicize Results of SBER Outreach Efforts	4				3	2	1
T5.1 - 12								
T5.1 - 13								
T5.1 - 14								
T5.1 - 15								
T5.1 - 16								
T5.1 - 17								
T5.1 - 18								
T5.1 - 19								
T5.1 - 20								

E - Task Based Marketing Activities (activities not quantifiable by unit)

Line Item #	ACTIVITY DESCRIPTION	ESTIMATED COMPLETION DATE (mm/dd/yy)	Work Product					
			Estimated Percent Complete by Quarter (Cumulative)					
			Q2 2002 (Apr - Jun)	Q3 2002 (Jul - Sep)	Q4 2002 (Oct - Dec)	Q1 2003 (Jan - Mar)	Q2 2003 (Apr - Jun)	Q3 2003 (Jul - Sep)
T5.2 - 1	Project name and "brand" established	08/30/02		100%				
T5.2 - 2	Draft and Issue RFP for Communication, Marketing, and Outreach Contractor	09/09/02		100%				
T5.2 - 3	Select CMO Contractor (Geltz Communications)	10/07/02			100%			
T5.2 - 4	Finalize Scope of Work and Negotiations with Geltz Communications	10/14/02			100%			
T5.2 - 5	Execute Contract with Geltz Communications	10/21/02			100%			
T5.2 - 6	Marketing and Outreach Kick-Off meeting with SBER Team	10/28/02			100%			
T5.2 - 7	Media plan	01/31/03			75%	100%		
T5.2 - 8	Outreach team goals and mission	10/31/02			100%			
T5.2 - 9	Final Marketing Outreach Plan	01/31/03			75%	100%		
T5.2 - 10								
T5.2 - 11								
T5.2 - 12								
T5.2 - 13								

T5.2 - 14								
T5.2 - 15								
T5.2 - 16								
T5.2 - 17								
T5.2 - 18								
T5.2 - 19								
T5.2 - 20								

F - Evaluation, Measurement and Verification Activities

Line Item #	ACTIVITY DESCRIPTION	ESTIMATED COMPLETION DATE (mm/dd/yy)	Work Product						
			Estimated Percent Complete by Quarter (cumulative)						
			Q2 2002 (Apr - Jun)	Q3 2002 (Jul - Sep)	Q4 2002 (Oct - Dec)	Q1 2003 (Jan - Mar)	Q2 2003 (Apr - Jun)	Q3 2003 (Jul - Sep)	
T6 - 1	Select EM&V Contractor	01/07/03					100%		
T6 - 2	Develop EM&V Plan	03/21/03					75%	100%	
T6 - 3	Conduct Market Assessments and or Baseline analysis								
T6 - 4	Develop Survey Instruments	06/30/03						100%	
T6 - 5	Conduct Phone/Mail/Email Surveys	12/19/03							50%
T6 - 6	Conduct On-site Surveys/Site Inspections	12/19/03						30%	30%
T6 - 7	Install Metering/Monitoring Equipment								
T6 - 8	Analyze Survey Data	01/30/04							25%
T6 - 9	Analyze Metering/Monitoring Data								
T6 - 10	Perform/Review Engineering Analysis								
T6 - 11	Provide Feedback to Implementer (s)	01/30/04							50%
T6 - 12	Provide Interim EM&V Reports and Memorandums	01/30/04						25%	50%
T6 - 13	Prepare and Submit Draft EM&V Report	01/30/04						25%	50%
T6 - 14	Prepare and Submit Final EM&V Report	02/27/04							

G - Subcontractor Activities

Line Item #	SUBCONTRACTOR	TASK				
T7 - 1	ASW	Establish which appliances and/or services will receive incentives				
T7 - 2	ASW	Identify the amount of incentive per appliance and service . Develop brief document.				
T7 - 3	ASW	Manage the Coupon mailing/Distribution to program participants				
T7 - 4	ASW	Manage Coupon redemption data entry and accounting				
T7 - 5	ASW	Remit Coupon statements and reports to RNA				
T7 - 6	ASW	Create a project database software with reporting capabilities				
T7 - 7	ASW	Generate Reports for RNA, IOU, Energy Division, and Energy Star affiliates as needed				
T7 - 8	ASW	Develop implementation protocols - for Accounting				
T7 - 9	ASW	Keep track of the coupons - Input data in the project database program.				
T7 - 10	ASW	Generate Monthly, Quarterly reports (Database)				
T7 - 11	ASW	Phone answering and recording calls in database for follow through				
T7 - 12	ASW	Project Management (in-house ASW only)				
T7 - 13	ASW	Project Supervision (Some project meeting and in-house ASW only)				
T7 - 14	ASW	Establish a dedicated SBER Energy Rewards program toll free telephone number				
T7 - 15	ASW	Prepare a script to be used by Operator and submit script to RNA for approval				
T7 - 16	ASW	Track and report the number of calls received				
T7 - 17	ASW	Develop the SBER Single Family Dwelling Work Plan				
T7 - 18	ASW	Implement Single Family Dwelling Coupon Program				
T7 - 19	ASW	Implement the coordination and data entry/tracking systems for the Multi-family Dwelling program component'				
T7 - 20	SBCCOG	Meeting of South Bay cities to decide on organizational structure				
T7 - 21	SBCCOG	formalize organization				
T7 - 22	SBCCOG	post staffing opportunity				
T7 - 23	SBCCOG	fill position/open office				
T7 - 24	SBCCOG	select energy efficiency measures				
T7 - 25	SBCCOG	select energy efficiency measures and incentive amounts				
T7 - 26	SBCCOG	finalize coupon application process				
T7 - 27	SBCCOG	establish in-kind outreach contributions				
T7 - 28	SBCCOG	finalize coordination with retailer role				
T7 - 29	SBCCOG	Kick-off media and outreach				
T7 - 30	SBCCOG	conduct events, workshops and outreach				
T7 - 31	SBCCOG	Process coupon applications				
T7 - 32	SBCCOG	Continue to support media and outreach				
T7 - 33	SBCCOG	file reports				
T7 - 34	SBCCOG	update project website				
T7 - 35	SBCCOG	monitor related energy opportunities and promote these via project platform				
T7 - 36	SBCCOG	develop strategy to build upon current successes				
T7 - 37	EIC	Define role and responsibilities of contractors				
T7 - 38	EIC	Define role of Affiliated and Non-Affiliated Contractors				

T7-39	EIC	Develop process to ensure non-discriminatory use of Contractors performing work on program				
T7-40	EIC	Develop process to ensure "level" playing field for Contractor participation				
T7-41	EIC	Define Process for application by MFD's to obtain energy efficiency financial incentives for approved measures				
T7-42	EIC	Define Approval of Process of a "Complete Project File" by RNA				
T7-43	EIC	Complete MFD SBER Project Manual				
T7-44	EIC	Complete Revisions to the MFD SBER Project Manual				
T7-45	EIC	Implement Process				
T7-46	EIC	Define Outreach Strategy				
T7-47	EIC	Approval of Strategy by RNA				
T7-48	EIC	Implement Outreach and Educational Strategy				
T7-49	EIC	Define data requirements for billing				
T7-50	EIC	Approval of billing protocol by RNA				
T7-51	EIC	Implementation of billing protocol				
T7-52	EIC	Conduct 100% pre and post inspections on every project				
T7-53	EIC	Support and represent RNA at Program Meetings as required				
T7-54	EIC	Provide coordination and comply with reporting requirements specified by RNA and ASW				
T7-55	Geltz	Assess existing marketing materials and processes; make recommendations in written report				
T7-56	Geltz	Energy Education "Self-Audit" Interventions recommendations, delivery, and development				
T7-57	Geltz	SBER Message and identity, using existing program name and logo				
T7-58	Geltz	Written report for coupon recommendations				
T7-59	Geltz	Retailer Participation Agreement edits and recommendations				
T7-60	Geltz	Program Web Site with Dybamic Calendar				
T7-61	Geltz	Natural Gas Savings Information and Referral materials design, development				
T7-62	Geltz	Community Workshop Tool-Kit and training module development				
T7-63	Geltz	Develop a training for using the Tool Kit				
T7-64	Geltz	Community Workshops, fairs, and events presentations				
T7-65	Geltz	Program Materials usage for training community representatives				
T7-66	Geltz	MFD Energy Seminars materials development				
T7-67	Geltz	Coupon distribution alternative methods development				
T7-68	Geltz	Develop Marketing Materials				
T7-69	Geltz	Develop Marketing and outreach components				
T7-70	Geltz	Provide Support for Press Events				
T7-71	Geltz	Clipping Service				
T7-72						
T7-73						
T7-74						
T7-75						
T7-76						
T7-77						
T7-78						
T7-79						
T7-80						
T7-81						

Number of Units								
NTG RATIO	PROGRAM UNIT GOALS	Number of units for which rebates are paid out and activities are completed						Q4 2003 (Oct - Dec)
		Q2 2002 (Apr - Jun)	Q3 2002 (Jul - Sep)	Q4 2002 (Oct - Dec)	Q1 2003 (Jan - Mar)	Q2 2003 (Apr - Jun)	Q3 2003 (Jul - Sep)	
0.80	306					30		
0.80	228				6	2		
0.80	228				2	8		
0.80	4,000					94	274	227
0.80	33						12	15
0.80	33					2	9	34
0.80	324							2
0.80	486						41	3
0.80	12				6			
0.80	16						3	4
0.80	32					2		
0.80	16							
0.80	16							
0.80	200							
0.80	1,800				2	25	526	251
0.80	16							
0.80	146						21	18
0.80	162							
0.80	2,758				62	41	856	478
0.80	324							
0.80	810					6	40	16
0.80	486							136
0.80	32							
0.80	542							
0.80	49							
0.80	437						2	
0.80	34							
0.80	556					6	30	28
0.80	130						5	
0.80	1,166					1	19	3
0.80	309				257			
0.80	16							
0.80	16							
0.80	16							
0.80	81							
0.80	684						150	82
0.80	81							
0.80	405						24	86
0.80	32				8			
0.80	292					1	317	141
0.80	49						1	
0.80	438					73	206	1
0.80	9							
0.80	8							
0.80	81							

0.80	324								6
0.80	8								1
0.80	8				1				
0.80	16								
0.80	146								
0.80	3								
0.80	29								
0.80	16								
0.80	106				70	117	147		104
0.80	41								5
0.80	81				24	28	103		553
0.80	81						26		2
0.80	861				479	2,670	806		1,188
0.80	387					117	385		918
0.80	387				3	79	1,653		412
0.80	387						202		7
0.80	387				3	861	201		112
0.80	387					1	749		925
0.80	81						9		
0.80	81					3	250		25
0.80	8								
0.80	8						7		5
0.80	8								4
0.80	8					5	32		1
0.80	33				19		13		
0.80	81						5		
0.80	81					1	15		2
0.80	8								
0.80	8								
0.80	16								
0.80	16								6
0.80	7								
0.80	12								
0.80	9								
0.80	9								
0.80	2								
0.80	2						8		
0.80	8								
0.80	8								
0.80	8								
0.80	8					15	146		24
0.80	162								
0.80	162						3		8
0.80	81				3				26
0.80	81								
0.80	81								
0.80	16								
0.80	13						2		
0.80									
0.80	10								
0.80	200				99		77		95
0.80	200				21		126		117

Q3 2003 (Jul - Sep)	Q4 2003 (Oct - Dec)	Q1 2004 (Jan - Mar)	Q2 2004 (Apr - Jun)	Q3 2004 (Jul - Sep)	Q4 2004 (Oct - Dec)	TOTAL	TOTAL UNITS COMMITTED
385	1,153	195				1,988	
						1	
1						4	
38						70	
1	3					6	
						1	

						1
1						3
						1
						2
						2
						3
2	1					4
						2
						2
						1
1	4					13
13	8					31
6	12					65

Q3 2003 (Jul - Sep)	Q4 2003 (Oct - Dec)	Q1 2004 (Jan - Mar)	Q2 2004 (Apr - Jun)	Q3 2004 (Jul - Sep)	Q4 2004 (Oct - Dec)	Date Completed (mm/dd/yy)
						09/15/02
						10/15/02
						11/15/02
80	90	100%				03/28/03
						3/30/04
						10/11/02
						10/07/02
						10/01/02
						11/04/02
						09/30/02
						10/11/02
						10/11/02
						09/30/02
						10/11/02
						10/7/02
						10/1/02
						11/4/02
						9/30/02
						10/28/02
						3/31/03
						09/30/02
						09/30/02
						3/15/03
						3/15/03
						12/23/02

						10/15/02	
80	100					12/31/04	
80	100					9/30/02	
80	100					2/2/04	
80	90		100%			3/30/04	
						6/30/03	

Q4 2003 (Oct - Dec)	Q1 2004 (Jan - Mar)	Q2 2004 (Apr - Jun)	Q3 2004 (Jul - Sep)	Q4 2004 (Oct - Dec)	Total	TOTAL UNITS COMMITTED
11,399					56,696	
					2,750	
					47,500	
10					21	
					1,336,209	
					1,618	
12					36	
200					6,982	
1					7	

Q4 2003 (Oct - Dec)	Q1 2004 (Jan - Mar)	Q2 2004 (Apr - Jun)	Q3 2004 (Jul - Sep)	Q4 2004 (Oct - Dec)	Date Completed (mm/dd/yy)
					08/30/02
					09/09/02
					10/07/02
					10/29/02
					11/04/02
					11/04/02
					01/31/03
					11/04/02
					01/31/03

Q4 2003 (Oct - Dec)	Q1 2004 (Jan - Mar)	Q2 2004 (Apr - Jun)	Q1 2004 (Jan - Mar)	Q2 2004 (Apr - Jun)	Q3 2004 (Jul - Sep)	Q4 2004 (Oct - Dec)	Date Completed (mm/dd/yy)
							01/07/03
							05/23/03
							06/30/03
100%							12/31/03
100%							12/31/03
100%							01/30/04
75%		100%					01/30/04
100%							01/30/04
100%							01/30/04
		100%					03/10/04

Q1 2004 (Jan - Mar)	Q2 2004 (Apr - Jun)	Q3 2004 (Jul - Sep)	Q4 2004 (Oct - Dec)	Total	TOTAL UNITS COMMITTED
				30	
				8	
				10	
104				699	
3				30	
8				53	
				2	
7				51	
				6	
8				15	
2				4	
222				1,026	
17				56	
253				1,690	
				62	
				136	
4				6	
19				83	
				5	
16				39	
				257	
1				1	
489				721	
8				118	
				8	
250				709	
				1	
				280	

				6
1				2
				1
63				501
26				31
5				713
				28
125				5,268
281				1,701
326				2,473
				209
50				1,227
847				2,522
				9
2				280
				12
				4
				38
				32
				5
				18
				6
				8
				185
4				15
				29
				2
41				312
70				334

