

ATTACHMENT 3 – WORK PLAN

Description of the Project: The Water-Energy Community Action Network Program will bring immediate water savings to approximately 260 homes and energy savings to approximately 1,703 homes in Disadvantaged Communities (DACs) in the Santa Ana River Watershed. The Program is a regional approach consistent with the Santa Ana River Watershed Integrated Regional Water Management Plan, the One Water One Watershed 2.0 Plan, and includes outreach, technical assistance, training, community engagement, and water-energy saving retrofits to DAC residents who meet the following criteria.

Dwell in a single family detached home located in:

- A 76% or higher scoring CalEnviroScreen 2.0 census tract;
- A Single Family Residential Land Use tract as reflected by the 2005 Southern California Association of Governments (SCAG) data; and
- The Santa Ana River Watershed.

This engagement across the Santa Ana River Watershed that includes San Bernardino, Riverside and Orange Counties will ensure the deepest level of community leadership and ownership in project implementation and long-term maintenance. The Program will use a three pronged approach over two and a half years. The three prongs will include:

1. Outreach field personnel will engage DAC residents by focusing on three clusters of communities with the highest proportion of areas that meet the criteria described above:
 - Area A: The City and Surrounding Area of Fontana in San Bernardino County, within Fontana Water Company and West Valley Water Districts service areas (for water saving retrofits);
 - Area B: The City and Surrounding Area of Jurupa Valley in Riverside County (for water saving and energy saving retrofits). If funds available, the Project can extend into the eastern portion of the Eastern Municipal Water District service area in Riverside County; and
 - Area C: The City of Santa Ana in Orange County (for water saving and energy saving retrofits).
2. As part of the water saving retrofits, outreach field personnel will enroll DAC residents in three counties within the watershed, areas A, B and C, for turf grass removal and

drought tolerant plant replanting with low flow irrigation installation. By enrolling, residents will receive a pre-screened contracted landscape professional to retrofit their lawn at \$5/square foot (\$3/SF from the Project coupled with the Metropolitan Water District of Southern California rebate of \$2/SF or from another local agency) in order to provide benefits at no cost to the resident.

- Orange County Coastkeeper will expand its ongoing Smartscape Program to provide landscaping workshops and a landscaping manual to DAC residents (in English and Spanish) for maintaining retrofitted landscapes with drought tolerant plantings.
3. As part of the energy saving retrofits, outreach field personnel will enroll and provide direct installation of Level I energy efficiency measures (LEDs, low-flow showerheads, etc.) for residents of Orange and Riverside Counties, areas B and C, at no cost to the residents.
- In San Bernardino County's portion of the Santa Ana River Watershed, the Program will provide funding to the Community Action Partnership of San Bernardino (CAPSBC) in order for them to extend their energy retrofit program to additional homes that meet the criteria described above.

Project Proponent: The Santa Ana Watershed Project Authority (SAWPA) is the primary project proponent and would be the grant recipient. SAWPA will sub-contract to independent consultants described in Task 7.

Project Partners: The independent consultants under Task 7 will include:

- Orange County Coastkeeper (Subtask 7.1);
- Independent Outreach Consultants (Subtask 7.2 and 7.3);
- CAPSBC (Subtask 7.4);
- Center for Sustainable Energy (CSE) (Subtask 7.5); and
- Independent Landscaping Contractor (Subtask 7.6).

Other project partners will include Western Municipal Water District, West Valley Water District, the Inland Empire Utilities Agency, the City of Santa Ana, Jurupa Valley Community Services District, the Fontana Water Company and potentially Eastern Municipal Water District. These water districts and cities will be partnering on the water usage data collection and providing the local cost share for the water saving retrofits (turf grass removal and replacement with drought tolerant plantings) through their existing rebate programs.

WORK PLAN TASKS

Task 1: Direct Project Administration and Reporting:

Subtask 1.1 Administration

Description of Work:

SAWPA staff will develop and manage the grant agreement in compliance with grant requirements. SAWPA staff will coordinate with the project partners to deliver benefits to areas that meet the criteria of a +76% score and 2005 SCAG Single Family Residential Land Use tract. This includes:

- Coordination and management of the central program manager;
- Coordination and management of the water saving retrofit landscape contractor;
- Coordination with the wholesale and retail water agencies; and
- Coordination with CSE and CAPSBC.

Subtask 1.2 Quarterly Reporting and Invoicing

Description of Work:

SAWPA staff will invoice and summarize work completed by quarter. For whole house energy efficiency retrofits in the San Bernardino County portion of the Santa Ana River Watershed, CAPSBC will provide pre and post-retrofit billing information, with kWh and Therm usage, of enrolled residents to the Department of Water Resources (DWR) via SAWPA. For areas B and C, CSE will use the calculate energy savings based on U.S. Environmental Protection Agency energy consumption data. For water saving retrofits, the retail or wholesale water agencies will share water usage data to DWR via SAWPA. SAWPA will summarize savings in quarterly reports.

Subtask 1.3 Draft and Final Project Report

Description of Work:

SAWPA staff will summarize work completed and benefits acquired by the Program. SAWPA staff will send draft to DWR. Upon receiving DWR's comments, SAWPA staff will revise and send final report.

Deliverables:

- Quarterly progress reports and invoices
- Draft and Final Project Report

Task 2: Easement(s):

Not applicable as the project is implementing a series of residential retrofits that will save residents money and utilities energy and water.

Task 3. Project Evaluation/Design/Engineering

Description of Work:

For residents enrolled in the Program in San Bernardino County's portion of the Santa Ana River Watershed for the energy saving retrofits, contractors managed by CAPSBC will evaluate the residential site, acquire necessary permits, and develop preliminary and final construction cost estimates. For enrolled residents in areas A, B and C for the water saving retrofits, the outreach field personnel and/or residents will provide photos and measurements of the turfed grass area of their lawns. The water saving retrofit landscape contractor will provide initial designs to the resident before the individual water saving turf grass replacement projects begin.

Deliverables:

- Samples of project designs for energy saving and water saving retrofits

Task 4: Environmental Documentation:

Not applicable as the project is implementing a series of residential retrofits that will save residents money and utilities energy and water.

Task 5: Permitting:

Description of Work:

CAPSBC, for the whole house energy saving retrofit, and the water saving retrofit landscape contractor will attain necessary permits for residential retrofits before work begins.

Deliverables:

- City and County permits acquired for the residential retrofits upon request

Task 6: Proposal Monitoring Plan:

Description of Work:

SAWPA staff will develop a Project Monitoring Plan that accounts for the water savings and energy savings from residents who receive the benefits through the grant. For the water saving retrofits, SAWPA staff will work with wholesale and retail water agencies to establish a plan, data sharing agreements, residential data waiver forms and points of contact. For the energy saving retrofits, CSE will establish a benefit accounting mechanism using the U.S. Environmental Protection Agency data. To monitor benefits acquired in San Bernardino County, SAWPA staff will develop a data sharing agreement between CAPSBC that allows the submittal of residential energy usage data to the state.

Deliverables:

- Proposal Monitoring Plan.

Task 7: Project Construction/Implementation:

Subtask 7.1 Smartscape Manuals and Workshops

Description of Work:

Orange County Coastkeeper will create a bilingual landscape manual applicable to residential properties and the transition period needed for drought tolerant plantings to gain a foothold in the Southern California climate. The manual, which will be available for free to interested residents at community meetings and during the outreach field personnel visits and workshops, will include information on climate, plant types and required irrigation. Orange County Coastkeeper will hold workshops in the communities (three in each county) by giving an overview of the Program including the energy saving retrofits available, the Program enrollment guidelines, the nexus between water and energy and the maintenance required for drought tolerant landscaping.

Subtask 7.2 Outreach Field Personnel

Description of Work:

SAWPA staff will hire up to six outreach field personnel, or apply for AmeriCorps personnel through the Local Government Commission CivicSpark Program. SAWPA staff will provide outreach field personnel with tools to focus on residents that meet the criteria of a +76% scoring and 2005 SCAG Single Family Residential Land Use tract to ensure savings go to DAC residents. Two outreach field personnel will each be assigned to one of the following three areas within the Santa Ana River Watershed:

- Area A: The City and Surrounding Area of Fontana in San Bernardino County, within Fontana Water Company and West Valley Water Districts service areas;
- Area B: The City and Surrounding Area of Jurupa Valley in Riverside County. If funds available, the Project can extend into the eastern portion of the Eastern Municipal Water District service area in Riverside County; and
- Area C: The City of Santa Ana in Orange County.

During implementation, one of the outreach personnel for area A may rotate to assist area B and C outreach personnel. Assuming a 10% conversion rate, where one out of ten residents enroll in the water saving and/or Level I energy efficiency retrofits, the outreach field personnel in area A will contact 1,300 residents, area B will contact 8,650 residents and area C will contact 8,650 over an 11 month period while working 40 hours per week (can include weekends). Upon a residential enrollment, the outreach field personnel will guide the resident through the paperwork of documenting the amount of turf grass in their lawn and the wait time for the water saving retrofit by the water saving landscaper contractor to occur. In areas B and C, the outreach field personnel will also provide enrolled residents with the Level I energy saving measures which includes the outreach personnel's installment of up to twelve LEDS (60W equivalent), up to two low-flow showerhead (1.5 GPM) and up to two thermostatic shower shut-off valves in each home. It will also include leaving them with a thermometer after adjusting their water heater temperature and arranging for the removal of a secondary in-use fridge (if applicable). If the resident is located in the San Bernardino County, the outreach personnel will refer resident to CAPSBC if they are eligible for the County-wide energy saving retrofit component as described under Subtask 7.4. If there are funds remaining, the Program can extend into the eastern portion of the Eastern Municipal Water District service area in Riverside County.

Subtask 7.3 Central Program Manager and Hotline Operator

Description of Work:

SAWPA will hire or provide internally a central program manager and hotline operator to serve for a 25 month period. SAWPA, with support from CSE, will train the central program manager and hotline operator on the residential enrollment guidelines for Program and the processes for installing the water savings and energy savings retrofits by contractors. SAWPA staff will provide both personnel with data and tools to identify residents that meet the criteria of a +76% scoring and 2005 SCAG Single Family Residential Land Use tract. The hotline operator will field questions from enrolled residents and channel communication from residents to outreach field personnel and the central program manager. The program manager will assist in early site visits in order to train outreach field personnel, serve as the central coordinator between SAWPA and the contractors, and manage the daily workflow of the outreach field personnel.

Subtask 7.4 San Bernardino County Whole House Energy Efficiency Retrofit

Description of Work:

SAWPA will hold initial meeting with CAPSBC to provide the tools needed to focus on +76% scoring census tracts and 2005 SCAG Single Family Residential Land Use tract and share billing information data in order to track energy savings for retrofitting 103 homes. CAPSBC will provide outreach to residents in San Bernardino County through its referral process when residents enroll in the California Alternate Rates for Energy Program. Funding to CAPSBC through the grant will allow CAPSBC to retrofit additional homes beyond its current capacity. The funding for a full house retrofit covers installation of appliances and energy saving measures at no cost to the DAC resident. Examples of measures include:

- Attic/ceiling Insulation;
- Water heater blanket;
- Caulking;
- Weather-stripping;
- Minor home repairs;
- Door replacement;
- Thermostat;
- Window/glass replacement;
- Duct repair;
- Water heater/range replacement;
- Energy efficient water devices;
- Heating system repairs/replacement;
- Electrical outlet and switch gaskets;
- Furnace filter replacement;
- Cooling system; and
- Microwave.

Subtask 7.5 Orange County and Riverside County Energy Saving Measures

Description of Work:

Outreach field personnel, trained by CSE will visit, enroll residents in the Program and install the energy saving measures in homes. CSE will serve as a point of contact with the central program manager in order to provide guidance on the installations. CSE will provide manuals and checklists to outreach field personnel. CSE will purchase the appliances in bulk and provide them to the outreach field personnel.

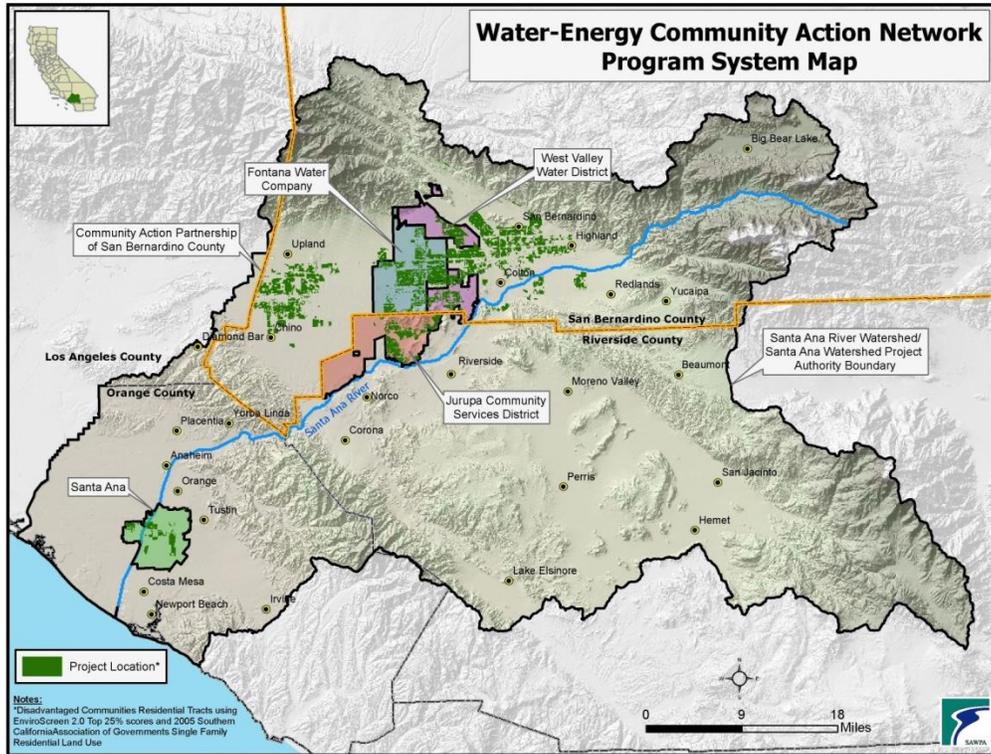
Subtask 7.6 San Bernardino County, Orange County and Riverside County Water Saving Retrofit

Description of Work:

SAWPA staff will hire a landscape contractor who can retrofit 282,000 square feet over a two year period. SAWPA staff will work with wholesale water agencies in the watershed that have existing turf grass removal/retrofit programs and a central landscape contractor. The contractor will visit residential sites after outreach field personnel enroll resident and provide available installation dates. Contractor will remove high water using turf grass and replace with drought tolerant plantings along with low flow sprinkler irrigation systems. Contractor will also be responsible for complying with all applicable local laws, ordinances, and other restrictions. The water saving retrofit will include the direct planting of plants that require minimal irrigation and the disposal of yard waste. SAWPA and the central program manager will manage the contractor to ensure that water savings retrofits are completed by October 2017.

Deliverables:

- Amount of residents by Census Tracts enrolled in Program
- Enrollment rate by outreach personnel
- CSE invoices for the energy savings retrofits – efficiency measures
- Contractor invoices for the water savings retrofits
- Invoices from CAPSBC for San Bernardino County energy saving retrofits
- Sign in sheets and talking points for Smartscape Workshops



The Program map above identifies the location of the project (in green) which are both the DAC census tracts and the measurable benefit areas. It also shows the non-measurable benefit area of the Santa Ana River. Note that these are the targeted areas of where the outreach personnel will target DAC residents for their enrollment in the water-energy saving retrofits. The Program allows for 1,703 homes to be registered and receive measurable benefits, all of which will be in the project location. The project locations are divided into three areas for the outreach field personnel to target (two personnel per area):

- Area A: The City and Surrounding Area of Fontana in San Bernardino County, within Fontana Water Company and West Valley Water Districts service areas (for water saving retrofits);
- Area B: The City and Surrounding Area of Jurupa Valley in Riverside County (for water saving and energy saving retrofits); and
- Area C: The City of Santa Ana in Orange County (for water saving and energy saving retrofits).

In San Bernardino County’s portion of the Santa Ana River Watershed, the Program will provide funding to CAPSBC in order for them to extend their energy retrofit program to additional homes that meet the Program criteria.