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ATTACHMENT 2

Updated Template for Pilot Proposal

Pilot Application Submittal

All submitted pilots should include the following information, if applicable:

1. Pilot Administrator:

- a. Requesting Entity

2. Pilot Description and Summary

- a. Purpose and Goal, including a specific statement of the concern, gap, or problem that the pilot seeks to address and the likelihood that the issue can be addressed cost-effectively through utility programs.
- b. Timeline: Projected start and finish dates, reporting frequency, assessment timeline and final assessment date and method of presentation;
- c. Overview of Budget Requested: Categories displaying material costs, administration, data collection and analysis, reporting costs, etc., should be included along with a brief paragraph explaining the breakdown;
- d. Anticipated Outcome, Results, including contribution to programmatic goals;
- e. and a proposed Evaluation, Measurement and Verification (EM&V) plan.

3. Pilot Rationale and Expected Outcome

- a. A specific statement of the concern, gap, or problem that the pilot seeks to address and the likelihood that the issue can be addressed cost-effectively through utility programs;
- b. A description of how the pilot will help achieve the ESAP and/or CARE goals and strategies;
- c. Specific objectives and goals for the pilot;
- d. Specific outcomes to be achieved including:
 - Estimated Energy Savings: (Measure Pilots; Measure pilots involve trials of new technology and/or energy efficiency hardware on a small scale, with the intention of expanding the measure to the entire utility and/or sharing results with other utilities if proven successful);
 - Estimated Resources Leveraged/Saved: (Non-Measure Pilots; Non-Measure pilots consist of partnership, leveraging, education, training and/or other types of trial initiatives that involve increased leveraging or more efficient use of utility resources in execution of its low income programs);
 - Combined Estimate of Energy Savings/Shared Resources: (Combined Pilots; Combined pilots have elements of both measure and non-measure pilots);
 - Non energy benefits or other benefits;
 - Other impacts on the existing program

- e. Information on relevant standards or metrics or a plan to develop a standard against which the pilot outcomes can be measured;
- f. A proposed Evaluation, Measurement and Verification (EM&V) plan; and
- g. A concrete strategy to identify and disseminate best practices and lessons learned from the pilot to all California utilities and to transfer those practices to resource programs, as well as a schedule and plan to expand the pilot to utility and hopefully statewide usage.

4. Pilot Implementation Plan

- a. Target Area
- b. Customer Eligibility Requirements
- c. Customer Assessment
- d. Number of households/customers/units to be piloted
- e. Delivery and Installation
- f. Non-Feasibility Criteria
- g. Other Policies

5. Pilot Budget Table

Details of Budget Breakdown: categories displaying material costs, administration, data collection and analysis, reporting costs, etc., should be included along with a brief paragraph explaining the breakdown.

Example Budget Table for Pilot Project		
Cost Category	Units	Date
HE2 Clothes Washers		
Recycling		
Administration		
Measurement and Evaluation		
Materials		
Evaluation		
Inspection		
Total		

6. Pilot Evaluation Plan

Overview of Pilot Evaluation Plan (PEP): The PEP should identify target data to capture as well as information on relevant standards or metrics or a plan to develop a standard against which the pilot outcomes can be measured. The PEP should specify data capture activities, state how the Pilot administrators will provide results for estimated energy savings, resources leveraged/saved or other non-energy related benefits gained, give relevant dates and deadlines, and set forth a definition of success for the pilot, as well as a schedule and plan to expand the pilot to utility and hopefully statewide usage.

- a. Target Data to Capture
- b. Data collection activities
- c. Description of estimated savings/resources leveraged methodology
- d. Definition of Success
- e. Dates and Deadlines (incl. Monthly Reporting; Final Report; Public Presentation)

7. Pilot Timeline and Milestones

Example Timeline for Pilot Project	
Item	Target Date
Project Initiation Meeting	
Training	
Installations	
Conclude Pilot	
Reporting	
Evaluation	
Draft Report	
Final Report	
Public Presentation	

8. Pilot Final Report

The Pilot Final Report should document all of the above complete with evaluated results.