

# **Assessment and Planning Report for Advanced Program Code Standard Policy Development**

## **Strategic Plan Task 3.2.2**

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## **1. Introduction**

Inyo County is developing a Cost, Energy and Service Efficiencies Plan to identify and implement activities that will lead to long-term changes that support energy efficiency, such as identifying specific measures to reduce energy use and developing a computer program to manage the County's electricity consumption, which, in turn, will provide cost savings to the county. The program also includes developing a regional template for other organizations to develop energy efficiency policies and programs. The program is proposed to be completed by October 2012.

Standards for energy efficiency including, but not limited to, LEED and Energy Star Ratings will be evaluated. A summary of options for a standard will be brought to the Board of Supervisors for review and one may be adopted as part of the CESEAP that will help the county achieve reductions in energy by setting defined goals to work towards. The policy will be composed of two parts: the first will be a cost-benefit driven program for county owned facilities greater than 4500 square feet and the second will be a voluntary, program for non-county stakeholders e.g. municipalities, private property owners, etc..

In order to better ensure the cost-effective success of the policy development task, similar policies and related resources of peer municipalities and organizations were reviewed and assessed. The results of this assessment and planning process are presented in this report.

### **1.1 California Long-term Energy Efficiency Strategic Plan (CEESP) Alignment**

#### **1.1.1 Strategic Plan Goal**

Strategic Plan Goal 3: "Local governments lead by example with their own facilities and energy usage practices."

#### **1.1.2 Strategic Plan Task**

Strategic Plan Task 3.2.2 – "Adopt a policy to require LEED, Energy Star Ratings, or other program standard for municipal facilities."

### **1.2 Policy Development Task Purpose, Goals and Objectives**

### **1.2.1 Policy Statement**

Existing energy efficiency standards may be adopted to provide a defined set of goals for county facilities. These goals will help the county achieve a reduction in energy use by providing methods and standards that have proven to be effective for other jurisdictions. Additionally, the County will attempt to create a resource and incentive program for the non-county stakeholders using a “lead by example” approach.

### **1.2.2 Goals and Expected Outcomes**

By adopting already proven standards the county can reduce energy consumption while maintaining operations at current locations. These standards will define the level of energy efficiency the county will need to strive for to meet energy reduction goals.

### **1.2.3 Energy Efficiency Impact**

A defined set of goals and standards for energy reduction throughout the county facilities can provide target levels of energy use to work towards. By adopting and following these standards the county will work towards meeting targets that will result in lowering the costs of energy use.

### **1.2.4 Policy Criteria**

Criteria used to define a set of goals and standards for energy reduction at county facilities must include considerations for:

- Ease of understanding/and communicating the goals to county officials and the public;
- Overall budget impact (including cost of certification and implementation if/as required);
- Ability to apply the goals that meet local issues and needs; and,
- Proven success by use of other cities, counties, public and private entities.

**[For detailed description of rating systems see Appendix B]**

## 2. Review of Existing Policies

### 2.1 Description of Reviewed Policies

#### 2.1.1 Peer Municipalities

- **County of Siskiyou, CA's General Plan** aims to decrease energy use to save money.

The majority of this will be done through

- Weatherization of homes and County facilities;
- Promoting and offering rebates for Energy Star products;
- Educating consumers, manufacturers and distributors;
- Financial incentives for building Energy Star homes and commercial buildings (for owners, builders and developers);
- Provide information on Energy Star products (including where to find products in the County and how much money they will save); and,

The County is also building a new Courthouse in Yreka which will be LEED Silver certified.

The policy that the county adopted includes:

- Promoting energy conservation measures
- Implementing state energy efficiency standards
- Working with local non-profits and utility companies to promote energy efficiency

The county also funded 2 energy based programs:

- Program HE.5.1: The County shall promote the weatherization program operated by Great Northern Corporation and funded by Pacific Power by providing information on currently available weatherization and energy conservation programs to County residents.
- Program HE.5.2: The County shall continue to enforce State requirements, including Title 24 of the California Code of Regulations, for energy conservation in new residential projects and encourage residential developers to employ additional energy conservation measures for the siting of buildings, landscaping, and solar access through development standards contained in the Zoning Ordinance, Building Code, and Specific Plans as appropriate.

<http://www.co.siskiyou.ca.us/PHS/planning/generalplan.aspx>

- **The City of Simi Valley** adopted the change in California's building standards in 2010 with some local amendments. Amendment A4.210.1 states that all appliances provided by the builder should meet Energy Star. There are also two local amendments that require

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residential buildings to exceed the minimum standard for California Energy Codes by 10% and non-residential by 15%. The City is also working to develop programs that finance energy efficiency improvements through property tax assessments or low-interest, deferred-payment loans. The City website offers overviews of their energy efficiency plan, links to outside resources, and a list of events sponsored by the city's Live Green program.

- **The City of Goleta** passed an Energy Efficiency “Reach Code” Ordinance in December, 2010 with the goal to exceed California energy efficiency requirement by at least 15%. The Ordinance is applicable to:
  - Any new building or structure of any size
  - Any addition to an existing building or structure where the addition is greater than 500 SF of conditioned floor area
  - Indoor lighting alterations in conditioned spaces greater than 500 SF of floor area within nonresidential buildings
  - All new circulation pumps for swimming pools, spas, & water featuresThe ordinance requires any built-in appliance to be installed in a residential building to be Energy Star-Rated.
  
- **Santa Clara County’s** new building ordinance was passed in 2008 and uses both LEED and GreenPoint Rated (GPR) guidelines. All county projects incorporate low energy building standards and must receive a LEED rating. The rating required follows some of the criteria below:
  - New buildings > 5,000 sq. ft.- LEED Silver standards;
  - New buildings >25,000 sq. ft.- officially LEED Certified, encouraged to strive for higher than Silver standards;
  - New county-owned residential buildings may use GPR guidelines instead of LEED; and,
  - Upgrades should be considered in any remodels and retrofits > 5,000 sq. ft.

<http://www.sccgov.org/SCC/docs%2FDevelopment%20Services%2C%20Office%20of%20%28DIV%29%2FAttachments%2FGreen%20Building%2FGreen%20Building%20Ordinance%20II.pdf>
  
- **The City of Eugene** City Council adopted a new buildings policy to guide the planning, design, construction, operation, and maintenance of City facilities in 2006:
  - LEED-EB (for existing buildings) standards are used as a guide for all county buildings and should receive Certification when economically feasible;

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- New construction > 10,000 sq. ft. should receive Silver certification level where technically feasible; and,
- LEED new construction standards should be used with all major renovations.  
<http://www.eugene-or.gov/portal/server.pt?open=512&objID=751&PageID=0&cached=true&mode=2&userID=2>
- **The County of Ventura** has multiple programs in place that make up Build It Smart! This is designed for residents of the community who would like to reduce their energy usage. The Build It Smart! website gives guidelines and examples of how to receive incentives and get “expert” advice from the programs and councils, including:
  - California New Homes Program uses Energy Star guideline to give incentives for building sustainable private homes ranging from \$400 to \$700.
  - The Savings by Design program partners with SCE to provide guidance for new buildings and major renovations. There are also financial incentives for successful projects. Incentives can reach up to 50% of the cost of upgrades with a maximum of \$150,000. Design assistance can range depending on what is needed, some examples are:
    - A simple design review
    - Efficiency upgrade recommendations
    - A complete computer simulation analysis and comparing results to other systems to look at the best design options.
  - Ventura County has a building council who advises the community on practices that save money spent on energy. The council employs some LEED accredited professionals. They also use Build It Green and GreenPoint rated guidelines. They can help private buildings to become LEED certified or GreenPoint rated.  
<http://www.builditsmartvc.org/>

### 2.1.2 Peer Organizations/Associations

- **The Redwood Coast Energy Authority (RCEA)** developed policies and procedures using the Energy Star Program Manager for facility benchmarking. The RCEA is currently working with Humboldt County as well as the cities of Arcata, Blue Lake, Eureka, Ferndale, Fortuna, Trinidad, and Rio Dell. The **Humboldt County** General Plan:
  - Promotes LEED Silver certification for county site design standards.
  - Incorporates incentives for private developments to be LEED Silver or higher.
    - Incentives include: more flexibility in site design, tax credits, fee reductions, and faster-track permitting.

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- Encourages the use and purchase of Energy Star equipment “whenever cost-effective.”
- New or renovated county facilities must follow LEED Silver rating standards or higher.
- Priority for leased office space should be given to buildings with an Energy Star rating.

<http://redwoodenergy.org/>

### 2.1.3 NGO Policy Resources (e.g., ICLEI, ILG, LGC)

- **The Local Government Commission (LGC)** is a nonprofit, nonpartisan, membership organization that provides technical assistance, and networking to local elected officials and other community leaders who are working to create healthy, walkable, and energy-efficient communities. The LGC's membership is composed of local elected officials, city and county staff, planners, architects, and community leaders who are committed to making their communities more livable, prosperous, and resource-efficient.

LGC assists local governments in developing and implementing policies and programs that help establish these key elements by:

- Facilitating conferences, regional workshops and other partnering opportunities;
  - Producing guidebooks, videos, slide shows, and several monthly newsletters that share policy and project ideas;
  - Providing an extensive resource library run by qualified staff;
  - Providing an e-mail alert service that shares information on available state and federal grants.
- **The Institute for Local Government (ILG)** promotes good government at the local level with practical, impartial, and easy-to-use resources for California communities. It has resources and examples to support low energy building policy in Local governments. The website provides links to examples of policies created by local governments, guidelines for local officials and other support. The ILG also presents the Beacon Award for Local Leadership which awards cities and counties that save energy through adopting policy and promote responsibility.

### 2.1.4 Other Policies and Resources

- **SCE** can provide reach code workshops, technical consultations and energy education centers. Their goal is to aid in creating Reach Code Policy or Green Building programs focused on Energy Efficiency. SCE also has specialists who can attend board meetings to

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educate, answer questions and provide support. All information can be on their website:  
<http://www.sce.com/b-sb/energy-centers/energy-centers.htm>

- **The U.S. Green Building Council** website is designed to help local governments' lower costs due to energy use. It provides many resources and "how to" webinars regarding creating building policies for local governments. Specifically the State and Local Government Toolkit and the Green Building Policies and Incentives Database.  
<http://www.usgbc.org/>
- **The Energy Star website** has detailed instructions concerning the portfolio manager, the rating system, and how to achieve high energy efficiency.  
<http://www.energystar.gov/>

## 2.2 Assessment of Existing Policies and Resources

### 2.2.1 Existing Policy and Resource "Pros"

There are many third party certification and rating systems that exist throughout California and they are fairly straight forward. It should not be difficult to find accredited professionals to inspect buildings. Many counties have already created incentive programs using both LEED and Energy Star guidelines. This provides a good blueprint for how to incorporate these programs into policy. County buildings are required to meet LEED Certified or above standards in many areas.

- **CALGreen** (see Appendix B for a description of CALGreen)
  - Tier 1 and 2 standards are improvements on the already existing codes.
  - Tiers can be modified to fit local conditions.
  - No registration or Certification fees
- **Energy Star**
  - Focuses solely on energy and takes into account all aspects of energy use.
  - The rating is recognized nationally and is recognized by the public at large (i.e. refrigerators and other household appliances often have easily recognizable EnergyStar ratings on them).
  - Easy to use in conjunction with the Energy Star Portfolio Manager
- **LEED**
  - Has been used in many policies throughout the country and has many accredited professionals

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- Considers multiple factors that go into building. In addition to energy, these include water efficiency, materials and resources, indoor air quality, and site sustainability.
- **Build it Green** (solely to be used for voluntary information and resource based strategies)
  - Developed in California and already used in multiple new building ordinances throughout the state.
  - Is specialized for residential homes (new and existing) and often considered less cumbersome than LEED for residential homes.
  - Good way for buyers to learn about the efficiency of a potential house.

### 2.2.2 Existing Policy and Resource “Cons”

Many of the policies in place encourage LEED and Energy Star standards for private buildings and homes but provide no incentives. Policies also only cover new building or major renovation projects; there are no requirements to upgrade existing buildings that may be highly inefficient. Public outreach is strong in all of the policies reviewed but in order for success the public has to be interested and the reaction may depend on how the new policy is marketed. For all of these certification processes, once a building or home is certified, no standard is required to be maintained.

- **CALGreen**
  - Tiers and verification procedures are not 100% clearly defined which can make it difficult to implement.
- **Energy Star**
  - Because it focuses solely on energy efficiency, does not provide a well rounded system for building which would include air quality, water use, recycling, etc.
- **LEED**
  - Can be expensive to become Certified.
    - There is significant paperwork involved.
    - There is significant oversight during construction.
  - Residential rating system is much harder to use than other systems and may discourage home owners from wanting to meet efficiency standards.
- **Build it Green**

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- *Only* covers residential homes. Could not be used in the development of policy for county facilities or commercial buildings.
- A home can be considered “GreenPoint Rated” with only 50 points on a scale that goes up to 200.

### 2.2.3 Aspects to Leverage

Requiring standards for County owned buildings will set an example for others operating or living in the county. Creating a combined incentive and informational based outreach program can involve the community in energy efficiency efforts. Incentives can be non-monetary such as, expedited building permits and design flexibility. Appendix C offers some examples of existing incentive programs in local governments. Publicity that includes examples of energy reduction success will be vital to keeping the community interested.

#### 2.2.3.1 Gap Analysis

Funding to update county buildings and create incentives will be limited, at best. More likely, due to budget challenges, the policy implementation will be limited to what can be done with existing resources. Renovating county buildings will be limited to a few that are the least efficient or, more likely, buildings that are schedule for renovation or modernization based on non-energy drivers (e.g. program changes, technology changes, deferred maintenance, etc.).

Incentives also require cooperation from local energy companies (SCE and LADWP). Keeping track of multiple suppliers will require communication with, and corporation from both.

For all of these reasons, it is anticipated that the policy may be informational and voluntary (for the non-county stakeholders); and cost/benefit oriented (i.e. financially driven) for the county buildings.

## 3. Policy Development and Adoption Plan

### 3.1 Overview

Implement the use of rating systems (such as LEED, Energy Star, or CalGreen) to increase efficiency standards of county buildings and that meet strategic plan task 3.2.2 while providing an incentive/information based program to help private building owners do the same. The figure in Appendix D explains the process for communication and the stakeholders that will take part in the policy development and adoption plan.

### **3.1.1 Policy Requirements**

The purpose of this policy is to require efficiency standards for county buildings that can be compared to similar buildings within the county, and potentially across the nation. These standards could then be used to create an incentive program for public and privately owned buildings throughout the county. The incentives could be qualitative or quantitative. The policy will require a third party rating system that can objectively evaluate the efficiency of each building.

### **3.1.2 Policy Development**

The County of Inyo will:

- Gather information and make multiple jurisdictions and entities operating in the County aware of the effort;
- Choose appropriate LEED or Energy Star based goals framed around energy efficiency and cost savings for buildings throughout the county;
- Change the rating program to fit the County of Inyo's needs and create achievable standards
  - Compare data from the utility manager system to LEED, and/or Energy Star, and/or Build It Green standards;
- Hold stakeholder meetings to gather ideas and public opinions, hold workshops to educate the public on what programs are available;
- Develop methods to encourage adoption of the County's program for privately owned buildings and houses;
- Provide County personnel with appropriate training and education in rating program;
- Publicize the program in order to educate the public on the benefits of meeting efficiency standards
  - Provide database (website) with standards, examples, and ideas to increase energy efficiency;
  - Provide benchmarking and database examples using the Utility Manager System.

### **3.1.3 Policy Adoption**

Implementer will:

- Draft a policy for an Advanced Program Code/Standard for existing or planned county buildings based on using either CALGreen Teir 1&2 standards or another established rating system such as LEED and Energy Star. This will be based on:
  - Baseline energy production/use.

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- Future scenarios depicting outcomes with and without policy adoption in the County.
- Rationale and benefits for policy adoption (including detailed programs, policies, and implementation plans).
- Revise and submit a final policy for the Advanced Program Code.

County of Inyo will:

- Release an annual energy use reduction and cost savings agenda item that highlights the past year's achievements. This will help keep elected officials and the general public stay informed and interested.

### 3.1.4 Staff Training

Depending on the rating system chosen, an accredited professional may be required in order to provide official evaluation to determine the certification of buildings. County staff should already be well versed in standards and how to achieve them so they can provide outreach, direction, and training for others as needed. Training will also need to be provided for the implementation of the computer tracking software. Training for the utility manager system is already recommended. In addition, some recurring, policy-related, training should be budgeted at least on a quarterly basis (~20 hours per quarter).

### 3.1.5 Policy Communications

The County may augment its existing website with an “energy saving” section that includes tips on how to increase efficiency and reduce utility bills. The County may also conduct public workshops and meetings to introduce the policy. The communications aspect of this policy must be well publicized, particularly with regard process and success with county building(s) savings and programs.

## 3.2 Resource Identification

### 3.2.1 Resource Requirements

Resource requirements are summarized as follows:

- An accredited professional is often needed to certify buildings.
- An Inyo County staff member will be required to learn the certification process in whatever program is chosen.
- For LEED, Energy Star or Build It Green, no subcontractor services are anticipated.

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- No additional computer software or hardware requirements are anticipated.
- A one-page description of whichever program is chosen can help to foster acceptance and interest from the stakeholder groups and the general public in new policies.

### **3.2.2 Existing Internal Resources**

Internal resources include:

- The County of Inyo website.
- The Utility Manager System.
- The Inyo County Planning Department.

### **3.2.3 External Resource Needs**

External resources include:

- County partners, other governmental agencies (local, regional, state, federal) and the general public.
- Existing programs elsewhere.
- Accredited professionals/consultants are required for LEED and Build It Green (and possibly Energy Star).

## **4. Schedule**

### **4.1 Policy Development and Adoption Schedule**

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STANDARD POLICY DEVELOPMENT (Energy Star/LEED) - County of Inyo: Cost Energy, and Service Efficiencies Action Plan (CESEAP)															
Schedule of Major Deliverables (partial)															
2011				2012											
Q-1	Q-2	Q-3	Q-4	Q-5	Q-1	Q-2	Q-3	Q-4	Q-5	Q-1	Q-2	Q-3	Q-4	Q-5	
Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct		
<b>1</b>	<b>Who</b>	<b>Plan</b>													
	<b>Imp</b>	Issue Draft Plan													
	<b>ProM</b>	Team, Staff, Stakeholder Buy-in													
<b>2</b>		<b>Advanced Program Code/Standard</b>													
	<b>Imp</b>	Draft Standard													
	<b>All</b>	Report on Stakeholder Input													
	<b>All</b>	Final Standard													
	<b>ProM</b>	Submit to Board													
<b>3</b>		<b>FINAL REPORT</b>													
	<b>All</b>	Best Practices and Lessons Learned													
<b>4</b>		<b>Maintenance &amp; Sustainability</b>													
	<b>All</b>	Monthly Meetings													
	<b>All</b>	CESEAP Scheduled Meetings													
		Inyo Associates - Independence													
		Independence Civic Club													
		Bishop Paiute Environmental Agency													
		Big Pine Civic club													
		Bishop Chamber of Commerce													
		Lone Pine Chamber of Commerce													
		Inyo Associates													
		Bishop City Council Study Session													
		Bishop Planning Commission													
		Death Valley Chamber of Commerce													
		Inyo County Planning Commission													
		Public Meeting													
		Public Meeting													
		Northern Inyo Hospital District - Board													
		Big Pine Paiute - Tribal Council													

KEY KEY  
**Imp** Imp Implementer  
**ProM** ProM Program Manager  
**All** All Implementer and Program Manger Team  
**tbd** tbd to be determined  
**3rd 2nd** Second Tuesday of every month  
  SCE Due Date

## 4.2 Monthly Activity Tracking Schedule

Program Manager and Implementer will meet monthly to review above schedule and tasks. A rolling punch list and activity list will be developed as a part of the meeting in order to ensure that activities are on schedule.

## 5. Budget

### 2.D Budget for Advanced Program Code Standard Policy (LEED or Energy Star)

Budget Item	Cost - Q1	Cost - Q2	Cost - Q3	Cost - Q4	Cost - Q5	Cost - Q6	Total Cost
<b>Baseline Data</b>							
<b>Collection &amp; Analysis</b>	\$0	\$1,775	\$0	\$0	\$0	n/a	\$1,775
<b>Policy Development</b>	\$0	\$0	\$172	\$172	\$172	n/a	\$515
<b>Policy Stakeholder Input</b>	\$0	\$0	\$180	\$180	\$180	n/a	\$540
<b>Policy Adoption</b>	\$0	\$0	\$0	\$688	\$688	n/a	\$1,375

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<b>Policy Training</b>	\$0	\$0	\$0	\$260	\$260	n/a	\$520
<b>Policy Communications</b>	\$0	\$134	\$134	\$134	\$134	n/a	\$535
<b>Administrative Support</b>	\$0	\$0	\$544	\$544	\$544	n/a	\$1,631
<b>Acquire Subcontractor</b>	n/a	n/a	n/a	n/a	n/a	n/a	\$425
<b>TOTAL</b>	\$0	\$1,909	\$1,029	\$1,977	\$1,977	\$0	\$7,316

## **6. Assessment of Policy Effectiveness**

Other than already specified energy goals established in LEED/Energy Star, the most efficient way to measure policy effectiveness is to compare the energy use data gathered from the utility manager system to data that is collected after this policy is adopted. Energy use data should continue to be tracked well after the policy is put into effect. This will give a more accurate assessment of the actual effects of the policy.

### **6.1 Staff Feedback Surveys**

No staff Surveys are anticipated except for quarterly meetings with representative team members.

### **6.2 Energy Efficiency Impact**

The utility manager system that is chosen will continue to track energy use throughout the county. The data collected post policy adoption and implementation will be compared to baseline data. The utility manager system will be able to show changes in both individual buildings and the county as a whole. Energy reduction will be identified through this process.

### **6.3 Policy Adoption**

As described above, after establishing the policy goals, an annual energy and cost savings agenda item, including past years' achievements, will be discussed and presented to the public.

### **6.4 Metric**

The metric will be established by the program chosen (LEED/Energy Star) and will be validated by the utility manager system.

## Appendices

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### Appendix A: Task Scope of Work

#### **Task 2.D -Adopt a policy to require LEED, ENERGY STAR ratings, or other program standard for Implementer's facilities**

As part of the Program, Implementer will develop an energy policy requiring standards for Implementer's facilities that incorporates LEED standards and ENERGY STAR ratings (Advanced Program Code/Standard). The policy will be presented to the Inyo County Board of Supervisors for consideration. These programs will be developed through research regarding similar programs elsewhere, and outreach to the County's partners and other local, regional, State, and federal agencies.

The Implementer will conduct an assessment of building practices in the region as well as other similar codes or standards that have been developed by other entities. As part of this planning process Implementer will consult extensively with other local and regional partners to develop its plan for LEED standards and incorporating ENERGY STAR ratings for its own facilities.

Outreach will occur to gather information and make other jurisdictions in the County aware of the effort. A final report will be distributed to the County's local, regional, State, and federal partners. Additional consultation will occur throughout the work effort. The Implementer will include a dissemination strategy for LEED standards and ENERGY STAR ratings, including potentially providing model development guidelines to Building and Safety offices, local building associations, and retail outlets throughout the County. County staff with responsibilities for energy efficiency planning and implementation will be involved throughout the work effort, and will be available to train other personnel, as appropriate. Training will be provided in the implementation of the computer tracking software.

Implementer will prepare a draft policy for the Advanced Program Code/Standard for incorporating LEED standards and/or ENERGY STAR ratings for County facilities. This draft policy will be reviewed with stakeholders including SCE, the City of Bishop, LTC, and GBUAPCD, among other constituents identified. A final policy for Advanced Program Code/Standard will be prepared and submitted to the Implementer's Board of Supervisors for consideration.

A final report on the process will be prepared and transmitted to SCE, the City of Bishop, LTC, GBUAPCD, and other interested parties documenting the best practices and lessons learned from the project, amongst other topics. The final Advanced Program Code/Standard will be shared with other interested agencies to assist them with their energy efficiency policy pursuits.

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

## Appendices

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1. Baseline energy production/consumption and associated emissions County-wide;
2. Future scenario without a program to minimize energy use;
3. Future scenario with such a program, as well as create tracking programs to measure progress
4. The rationale and benefits of the proposed scope of work include the following:
5. Consensus-based solutions to minimize activities contributing to energy use and related emissions, and promote energy efficiency throughout the County.
6. Detailed programs, policies, and implementation measures to achieve the solutions identified.

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. Assessment and Planning Report for the Development of a Policy for LEED, ENERGY STAR or other program standard (Advanced Program Code/Standard) for Implementer's Facilities – Implementer shall include assessment of existing codes/standards and/or policies and resources, and plan for developing advanced program code/standards for Implementer's facilities based on the information gained from the assessment. This may be in the format of a memo report or full report.
3. Draft Advanced Program Code/Standard – Implementer may include amendments to County Code.
4. Report on Stakeholder Input: Policy adopting LEED standard and or ENERGY STAR ratings for County Facilities -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.
5. Final Policy on Advanced Program Code/Standard
6. Submit Advanced Program Code/Standard to Board of Supervisors for consideration

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7. 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.
8. Final Report on the Process that is distributed to SCE, the City of Bishop, LTC, and GBUAPCD, among other constituents.
9. Monthly reports of tracked Performance Indicators

Task 2.D. - Deliverable(s)	Due Date(s)
1. Report on Status of Consultant or Subcontractor to Support the Task	August 8, 2011
2. Assessment and Planning Report for the Development of a Policy for LEED, ENERGY STAR or other program standard (Advanced Program Code/Standard) for Implementer's Facilities	November 4, 2011
3. Draft Advanced Program Code/Standard	July 31 <sup>st</sup> , 2012
4. Report on Stakeholder Input	September 17 <sup>th</sup> , 2012
5. Final Advanced Program Code/Standard	September 17 <sup>th</sup> , 2012
6. Submit Advanced Program Code/Standard to Board of Supervisors for consideration	October 9 <sup>th</sup> , 2012
7. Final Report on the Process that is distributed to SCE, the City of Bishop, LTC, and GBUAPCD	October 9 <sup>th</sup> , 2012
8. Monthly Status reports per Task 4	Monthly with Invoicing Requirements (Task 4)

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### Appendix B: Rating System Descriptions

- **Energy Star** was introduced by the US Environmental Protection Agency (EPA) in 1992 for both public and private buildings. It uses The National Energy Performance Rating system which rates buildings' energy use compared to similar buildings across the nation. It uses a 1-100 scale indicating that a rating of 50 would be an average performance while a rating of 75 suggests a high performance (better than 75% of like buildings nationwide). The rating is calculated using the Portfolio Manager. Buildings within a county or town can be entered into the Portfolio Manager which tracks and assesses energy use. The manager starts by determining a baseline of all buildings, and then benchmarks by comparing buildings within the county to each other and to outside buildings. It also evaluates facility systems and equipment while looking for potential improvement. The Portfolio Manager essentially helps in creating an energy action plan by identifying the necessary steps to reach the county's goals and to set a timeline. The Manager can then set tracking to measure energy use throughout the project and evaluate the progress.
  - Buildings that rate 75 points or higher are eligible to receive Energy Star. This does not, however, take into account differing climates or specialized activities that may require more energy.
  - The rating system within Energy Star only looks at energy use.
  - Different building types require different data but most call for:
    - Zip code
    - Gross floor area
    - Weekly operating hours
    - Number of workers on main shift
    - Number of personal computers
    - Percent of gross floor area that is air conditioned
    - Percent of gross floor area that is heated

<http://www.energystar.gov/>
- **Leadership in Energy and Environmental Design (LEED)** is an international green building certification system that was developed by the U.S. Green Building Council in 2000. The rating system is based off of five categories:
  - Sustainable sites (site selection)
  - Water efficiency
  - Energy and Atmosphere
  - Materials and resources

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- Indoor environmental quality

LEED certification provides an independent, third party evaluation of the energy efficiency and overall “green” design of a building. There is also LEED-EB for existing buildings which provides standards for buildings not undergoing major renovations to achieve Certification. One of the requirements for LEED EB is that the building become Energy Star rated.

The ratings are based on a points system which varies for each kind of project (new construction, existing building, etc.). Points are given in each of the five categories based on standards. High scoring buildings can then receive a Certification or higher based on the brackets below:

- Certified 40 - 49 Points
- Silver 50 - 59 Points
- Gold 60 - 79 Points
- Platinum 80-110 Points

[www.usgbc.org/LEED/](http://www.usgbc.org/LEED/)

- **Build it Green** is a non-profit organization based out of Berkeley, CA that provides guideline and a certification program for California. It is often used in conjunction with LEED. The guidelines differ for new homes, remodels, and multifamily developments. Project design categories include the use of natural resources, water use, energy use, indoor air quality, and community planning. Build it Green uses the **GreenPoint Rated** program, first developed in Alameda County, which is a sustainable building rating system for homes. Homes that score the minimum point requirements in each category and have a total of 50 point or higher can be designated GreenPoint Rated. All rated residences exceed California’s minimum building and energy codes. Similar to LEED and Energy Star, homes are compared to like residences to receive a rating.  
<http://www.builditgreen.org/>
- **CALGreen** Tier 1&2 are voluntary by state law unless made mandatory by local governments. Additional efficiency building measures are necessary to meet the threshold of each level. This is a “better than code” program that would encourage higher energy efficiency than is required by California law.
  - Tier 1: Exceed the *California Energy Code* based on the 2008 energy standards requirements by 15 percent.
  - Tier 2: Exceed the *California Energy Code* based on the 2008 energy standards requirements by 30 percent.

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Both tiers require additional non-energy prerequisites, as well as a certain number of elective measures in each green building category (energy efficiency, water efficiency, resource conservation, indoor air quality and community). If a local government chooses to go beyond the baseline Code by adopting one of the tiers, it will be up to each city to decide whether the tier will be voluntary or mandatory, and how the additional measures will be enforced.

### **Appendix C: Peer Municipality Incentive Program Descriptions**

- **The City of Berkeley** Financing Initiative for Renewable and Solar Technology (FIRST) is a program for property owners to fund photovoltaic installations. Property owners can borrow money from the City's Sustainable Energy Financing District for the upfront costs and then repay the financing through voluntary tax increment in their property tax bills over 20 years. This program has a fixed interest rate over the 20 years and the repayment obligation stays with the property if the house is sold.
- **The City of Palm Desert** has a goal to reduce energy use by 30% by 2012 (as a part of a five year plan starting in 2007). The city's Set to Save program, partnered with SCE and Southern California Gas Company, provides funding for major energy saving improvements including high-efficiency air conditioners, dual-pane windows and solar panels. The long-term payback program is then linked to the owner's property taxes, similar to the Berkeley FIRST program.
- **The Anaheim Green Building Program** offers ways to certify projects with low energy consumption. There is an incentive program that gives advantages to choosing to reduce energy (which can be standards for any third party rating program including LEED or Energy Star) including:
  - Accelerated plan approval;
  - Financial incentives;
  - Waived plan check fees up to \$50,000; and,
  - Free technical assistance.

Incentives for using LEED ratings range from \$15,000 for Certified buildings to \$30,000 for Platinum. Other rating systems range from \$1,000 to \$6,000.

[http://www.anaheim.net/utilities/adv\\_svc\\_prog/green\\_power/Grnbuild.pdf](http://www.anaheim.net/utilities/adv_svc_prog/green_power/Grnbuild.pdf)

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- **The City of San Rafael** passed a building ordinance that partnered with other Marin cities to create a program that is applicable to new residential and commercial buildings. Incentives are given to projects with at least 100 GreenPoints for residential buildings and a LEED Gold rating for commercial buildings. Incentives include:
  - Expedited building permit plan check processing;
  - Reimbursement of the GreenPoint Rater services up to \$1000; and,
  - A bronze plaque to identify the project as Green.<http://acm.cityofsanrafael.org/Assets/CDD/Planning/Green+bldg+ord.pdf>

## Appendix D: Organization Delivery System, Approach and Issues

