ENERGY EFFICIENCY PROGRAMS

California Foodservice Instant Rebates Program Implementation Plan

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Program Overview

The Statewide Foodservice Point-of-Sale Program, called the California Foodservice Instant Rebates Program ("Program"), works with midstream market actors to offer point-of-sale ("POS") rebates to California Investor Owned Utility ("IOU") end-use customers. All customers with a non-residential rate structure served by one of the four IOUs, Pacific Gas & Electric ("PG&E"), San Diego Gas & Electric ("SDG&E"), Southern California Gas Company ("SoCalGas"), and Southern California Edison ("SCE"), are eligible for POS rebates and the Program will be offered consistently across all IOU territories. The Program offers deemed, POS rebates to customers and incentives to midstream market actors for facilitating and influencing sales of a wide variety of high-efficiency commercial kitchen and refrigeration equipment. Additionally, the Program advocates for increased awareness and sales of high-efficiency equipment through a variety of outreach, training, advertising, and engagement activities.

Program Budget and Savings

Please refer to the California Energy Data and Reporting System ("CEDARS") for the following program details:

1. Program Budget
2. Program Gross Impact Table
3. Program Cost Effectiveness (TRC and PAC)
4. Type of Sub-Program Implementer
5. Market Sector
6. Sub-program Type
7. Intervention Strategies (Upstream, downstream, midstream, direct install, non-resource, finance, etc.)

Implementation Plan Narrative

1. **Program Description**

The Statewide Foodservice Point-of-Sale Program, called the California Foodservice Instant Rebates Program ("Program"), works with midstream market actors to offer point-of-sale ("POS") rebates to California Investor Owned Utility ("IOU") end-use customers. All customers with a non-residential rate structure served by one of the four IOUs are eligible for POS rebates and the Program will be offered consistently across all IOU territories. Commercial foodservice ("CFS") equipment dealers, manufacturers, contractors, distributors (collectively, "Participants") who make sales directly to end use customers are eligible to enroll in the Program. Once enrolled, Participants will promote and upsell eligible equipment, offer their customers the POS rebate as a discount on their sales invoice when they make a sale, and then submit their sales information to receive reimbursement. Participants are reimbursed for the rebate amounts plus a sales incentive or "spiff," to incentivize sales staff to promote the Program, upsell to their customers and to cover the additional administrative work required by Program participation. The Program also offers incentives to entities that influence the sale of high-efficiency equipment.

The Program is designed to overcome barriers of the foodservice market to specify, stock, and sell high-efficiency natural gas fired and electric equipment to commercial customers in California. The Program will work with multiple foodservice market sales channels that service various customer segments. The Program will include both foundational and innovative midstream and POS implementation and engagement strategies to elevate the program model to foster greater market participation across diverse customer segments.

The Program's overarching goals are to: (1) deliver significant energy savings to the California IOUs and (2) foster market transformation. In support of these goals, the Program has the following objectives:

1. Increase the available stock of high-efficiency equipment so that these models are available to customers for quick replacement situations
2. Influence Participants to integrate energy efficiency considerations into their sales processes and upsell high-efficiency equipment
3. Influence other market actors (franchisors, manufacturer representatives, manufacturers, design consultants) to integrate energy efficiency considerations into their equipment specification, sales, and promotional techniques
4. Increase opportunities for customers to receive incentives on high efficiency equipment
5. Support market adoption of new, high-efficiency technologies
6. Increase adoption of high-efficiency equipment among hard-to-reach ("HTR") and disadvantaged communities ("DAC") customers
7. Increase awareness of high-efficiency equipment options and benefits in the CFS market
8. Influence manufacturers to develop new high-efficiency models and technologies

2. Program Delivery and Customer Services

The Program will deliver natural gas, electric, and water savings by offering midstream POS incentives for the sale and installation of high-efficiency commercial foodservice equipment. The Program will achieve program objectives by enrolling and engaging with Program Participants, conducting customer and CFS industry outreach, and through marketing activities.

Program Participant Enrollment and Engagement:

Target Participants: Eligible Program Participants are equipment dealers, distributors, or in some cases manufacturers, who make sales directly to end use customers. In the CFS market, there are various sales channels that Participants can sell CFS equipment through as equipment flows from manufacturer to end use customer. The Program will target Participants that operate in each of the four main sales channels.

1. **Cash and Carry** ("C&C") (~25% of the market): C&C dealers sell restaurant supplies, equipment, and in some cases food. They commonly have a showroom/store, make same-day sales, and stock lower-priced equipment.
2. **Design/Build** (~45% of the market): Design/Build dealers design and build facilities that have food service equipment. They target new construction, re-designs, large projects, and chain facilities. They commonly do not stock equipment or have a showroom.

3. **Manufacturer Direct** (~20% of the market): Manufacturers make sales directly to customers and sales through specialty and high-volume kitchen equipment suppliers and general purchase organizations.
4. **Online** (~10% of the market): Online dealers sell equipment and supplies through an online web portal. Online is the fastest growing sales channel.

Cross-over between the channels is common. For example, it is common for C&C dealers to also have a department that focuses on design/build sales and many dealers are expanding to offer online sales. Historically, POS foodservice programs in California have only garnered participation from the C&C sales channel. This Program will focus on targeting and engaging Program Participants in all sales channels.

The Program will also target CFS manufacturer representatives ('reps") to enroll in the Program to participate in the Mid-market Bonus Incentive offering. Reps manage regional equipment distribution on behalf of manufacturers and in some types of equipment sales play a more influential role in educating customers, designers, and others on the benefits of high-efficiency equipment than equipment dealers.

Additionally, the Program will target distributors and manufacturers of ultra-low temperature ("ULT") freezers to participant in the Program. Though not a CFS product, ULT freezers are included due to the similarities in distribution channels and technology. Many ULT freezer manufacturers sell directly to end-use customers, similarly to CFS manufacturers, or through smaller distribution networks. Target customers for ULT Freezer sales can include hospitals, research institutions, and vaccine distribution sites.

***Participant Enrollment and Engagement*:** Outreach activities will initially prioritize top equipment dealers and manufacturer reps in each IOU's region, as well as national dealers, and then expand to smaller, local dealers and reps. Once enrolled, new Participants will be provided with various trainings on the Program - how to effectively upsell premium efficient options and how to submit incentive claims. They will also receive point-of-purchase marketing materials (banners, signs, stickers, etc.) to display if they have a showroom or public area. Once initial trainings are complete, regular in-person and phone outreach will be conducted to all Participants.

During ongoing outreach, staff will monitor participation, deliver and refresh marketing materials, and have regular check-ins with the various staff members that interact with the Program, from CEO to admins. During check-ins, Program staff will regularly discuss current market conditions, sales forecasts and projections with Participants. They will provide customized support to identify new opportunities and barriers as they arise and develop corresponding intervention strategies. Another effective strategy the Program will employ is sales competitions and promotions to increase participation, based on Program and IOU needs. Annually, Program staff will develop market share reports for each Participant, collaboratively set goals, mark progress towards those goals, and honor accomplishments with awards. Participant engagement efforts will be scaled to Participants' potential for delivering energy savings, as well as to ensure adequate coverage across all IOU service territories.

Customer & Industry Outreach and Marketing

Target Customers: Common customer segment groupings for commercial foodservice with percent of total equipment purchases within the CFS industry are described below.

- **Restaurants (65%):** Restaurants can be independently owned, chains, or franchised. Independent restaurants typically utilize local cash and carry or online dealers, whereas chains often work with large, national design/build dealers or purchase directly from the manufacturer. Franchises often have only a few options of equipment to install but may be able to purchase from the dealer of their choice.
- **Recreation and Retailers (20%):** Recreation includes hotels, casinos, and sports clubs. Retailers include grocery, club, convenience stores. These segments purchase equipment primarily from the design/build sales channel.
- **Institutions (15%):** Institutional customers include education, public sector, military and corrections facilities, hospitals, and nursing homes. Most institutional segments purchase foodservice equipment from large design/build dealers or directly from the manufacturer.

All commercial foodservice customer segments will be targeted by Program marketing and customer and industry outreach efforts, with particular focus on independent and chain restaurants, the education and grocery sectors, and hard-to-reach (HTR) and disadvantaged communities (DAC).

The Program will use the most current version of the CalEnviroScreen Tool to identify census blocks with percentile scores over 75 percent and any additional census tracts that score in the top 5% of CalEnviroScreen's Pollution Burden indicator in an effort to identify and serve DACs. The Program will refer to the HTR definition from CPUC decision 18-05-041 to identify and serve HTR customers.

***Marketing Collateral & Advertising*:** A suite of program materials will be provided to all Participants and other market actors who interact with customers. These materials communicate essential information about eligible products, rebate amounts, and other program requirements. Customer facing program collateral will be translated into multiple languages, including Spanish, Mandarin, Korean and Tagalog, as needed. The Program will also conduct targeted marketing campaigns as part of a multi-channel marketing effort to increase awareness of the Program and the benefits of high-efficiency equipment, as well as to reach specific target customer segments and achieve Program goals. The planned marketing campaigns include industry events, print and media publications, digital and social media, and direct customer outreach.

Customer Engagement: Targeted customer engagement efforts are planned for chain accounts, HTR and DAC customers, schools, grocers, and institutions. Direct customer outreach activities will include attendance, tabling, sponsorship and presentations at various industry and operator trade shows, community organizations, and conferences; participation and promotion via IOU energy center and California Energy Wise webinars and events; in-person visits and canvassing of targeted

census tracts; providing custom equipment recommendations to select chain account utilizing advanced metering infrastructure ("AMI") data.

Industry Engagement: Tradeshow, conference and operator event sponsorship and participation will facilitate the general dissemination of Program information and allow for one-on-one contact with decision makers. This outreach will be used to directly influences purchasing decisions, new facility design, and ongoing operations. CFS customers and Program Participants are highly reliant on these industry events to meet with their partners and get a pulse on what is going on in the CFS Industry.

3. Program Design and Best Practices

The Program is designed to deliver significant energy savings for the IOUs by overcoming the following barriers to market adoption of high-efficiency Foodservice technologies.

Customer Barriers

- *Education and Awareness:* Customers and the majority of market actors are unaware or do not understand the benefits of high-efficiency foodservice equipment or available incentive programs.
- *Ease of Participation*: The effort of applying for incentive for high-efficiency equipment after purchase often deters customers from participating in incentive programs.
- *First Costs*: Sensitivity to up-front costs, lack of coordination between purchasers and energy managers, corporate limitations on purchase choices, etc. often prevent businesses from investing in high-efficiency equipment.
- *Chain Customers:* Chain restaurants (45% of the restaurants) have limited equipment options, because they are often defined in a corporate-approved specification and purchased through pre-established suppliers. Individual location operators have limited choices and changing a chain's equipment specification often takes 1-2 years.

Supply-Side Barriers

- *Ease of Participation:* Participation must be relatively easy and low effort for Participants to be willing to make the investments in staffing, training, accounting, and documentation.
- *Stocking:* If an equipment dealer does not stock high-efficiency equipment, a customer will not buy it in a replacement-on-burnout scenario because it's not feasible to wait days or weeks for delivery. Many dealers do not stock high-efficiency equipment because of the higher up-front costs and concerns that it will not sell.
- *Special-Order Equipment:* The bulk of equipment sold in the market is "special-order," rather than stocked. However, "special-order" sales are difficult to influence through traditional point-of-sale foodservice rebate programs because the rebates are more in line with the cost of stocked equipment. Special order equipment tends to be much more expensive, requires a longer, more labor-intensive sales process, and involves multiple market actors.
- *National Market Actors*: The key market actors in the design/build, online, and manufacturer-direct foodservice sales channels are predominantly national companies with 50+ locations and

thousands of staff. These companies have complex operations, software, and structures that require significant investment to modify. They are generally interested in promoting high-efficiency equipment, but the disparate requirements and processes of the 100+ foodservice programs in the United States are overwhelming for these companies to incorporate into their sales processes.

Program Strategies

Foundational Strategies: The Program's foundational strategies are the best practices that Energy Solutions has developed and honed over many years implementing POS foodservice and other midstream programs in southern California and across the United States. These strategies have built trust with a network of many foodservice equipment Participants nationwide and focus on overcoming both customer and supply-side barriers. Foundational strategies include:

- Consistent, customized, in-person outreach to participants to identify organization barriers and then work together to implement solutions to maximize participation and building and maintaining long-term trusting relationships with market actors.
- High quality and effective point-of-purchase marketing materials to promote the Program.
- Provide POS Rebates to IOU customers as a line-item discount on their sales invoice. Participants front the POS incentives to the customers at the time of sale, and then submit reimbursement claims. The Program will process claims and reimburse participating dealers in weekly check runs for the rebate amounts plus a sales incentive, or "spiff."
- Enable Participants to quickly verify eligible IOU customers via zip code, submit applications in two minutes and receive prompt reimbursement.
- Utilize a simple online application system that functions as a secure incentive processing, tracking, and reporting platform that allows submittal of incentive claims in two minutes and quick payment of incentives.
- Strategic partnerships that make participation more streamlined for customer and market actors in areas with multiple program administrators.
- Review all measures and incentives at least annually through a rigorous review process, taking into account market trends, savings and IMC changes, performance, and forecasts.

Targeted Strategies: In addition, the Program will offer a series of newer strategies to overcome market barriers to significantly increase Program participation.

- Offer National Market Actors a single application portal, simple, streamlined access and the individual support that large, national organizations require to participate.
- Industry Partnerships to integrate the Program into software that most equipment dealers already utilize, reducing the administrative and process changes required to participate in the Program.
- Targeted Customer Sector Engagement of K-12 schools, colleges and universities, supermarkets and grocers, and institutional kitchens. The Program will leverage prominent trade organizations, coordinate advertising buys, and participate in targeted industry conferences and events.
- Robust market education and outreach to promote energy-efficient equipment and practices, including sponsorships, advertisements, interviews, webinars, and coordination with manufacturers, community-based organizations, and trade associations.

- Develop a number of new measures that will enable the Program to offer customers a more diverse measure mix, more incentives per project, an increase in savings opportunities, and lower total project costs. Measure development will promote new energy-saving technologies and facilitate market adoption.
- Offer additional incentives to assist new Program Participants in making the necessary investments to support comprehensive participation, incentivize highly influential market actors, such as manufacturer representatives, and enable HTR and DAC customers to reduce financing costs for equipment purchases.
- Collect current market data and conduct equipment testing to validate and revise, as necessary, current CFS measure workpapers to better align with current market conditions and ensure persistence of savings.

4. **Innovation**

The Program has been designed to build upon the successful foundation of the prior SoCalGas POS Foodservice program, which has run for the past 7 years. Three years ago, that program tested a simplified incentive claim and zip code eligibility tool. These delivery approach innovations significantly increased participation and laid the groundwork to expand this approach to the other IOUs. Each of the Program's other innovative components, described below, are designed to address the barriers that have kept approximately 75 percent of the CFS market from participating in POS foodservice programs. As a result, the Program will deliver significantly greater energy savings to the IOUs, foster greater awareness of high-efficiency equipment and available rebates.
Delivery approach innovations focus on making the program more accessible to large, national equipment dealers, including those that specialize in online sales. Information about Program rebates will be made available through AutoQuotes, the CFS leading configure, pricing, and quoting software, already used by a majority of national dealers. New incentives offered to manufacturer representatives will motivate them to promote more high-efficient equipment options, promote the rebates to their customers and facilitate transfer of customers to Program Participants who can complete the sale and ensure POS rebates will be included. A new software tool will be scoped and developed to enable online equipment dealers to determine customer eligibility and offer POS rebates to their customers efficiently and securely. The Program has been designed to align with similar programs implemented by Energy Solutions across the country. National dealers will receive custom support and be able to participate in all Energy Solutions'-implemented programs using the same online system, similar process, and a single point of contact.

Innovative marketing strategies will include efforts such as, an intelligent online ad campaign targeting individuals using personas and geo-fencing to deliver program advertisements to customers in their native language and post-purchase communications sent to all customers who have received a rebate through the program as a "thank you" and to promote other demand-side efforts.
Lastly, promising new technologies with high savings opportunity will be researched and developed into new measures. New workpapers will be developed and test of a new incentive design for leased dishmachines will create new opportunities to promote energy savings.

5. Metrics

The Metrics table below identifies the Key Performance Indicators ("KPIs") for the Program and describes how each KPI will be tracked. These KPIs will be the primary means of assessing the Program's performance on an ongoing basis.

Table 1 - Metrics

Metric #	KPI	Description	Continuous Monitoring Mechanisms
1	Performance: Goal Accomplishment (net therm savings)	Percentage of net annual therm savings achieved vs forecasted	Monthly Reports, Online Application System
2	Performance: Goal Accomplishment (net kWh savings)	Percentage of net annual kWh savings achieved vs forecasted	Monthly Reports, Online Application System
3	Cost Effectiveness Alignment: TRC Calculation	TRC – Actual vs. forecasted Difference: Actual Minus Forecasted	Annual Reports
4	Performance: Cost Per Unit Saved	Levelized PAC Cost - Actual vs. forecasted Difference: Actual Minus Forecasted	Annual Reports
5	Performance: Disadvantaged Communities	Percentage of customers in disadvantaged communities	Quarterly Reports
6	Performance: Hard-to-Reach	Percentage of customers meeting HTR definition[1]	Quarterly Reports
7	Participant Enrollment	Total number of enrolled dealers, measured by number of signed Dealer Participation Agreements (DPA)	Quarterly Reports
8	Participant Satisfaction	Scale from 0-4 rating enrolled participant satisfaction with program. Contractor will have opportunity to review survey instrument prior to use	Annual Reports
9	Customer Satisfaction	Scale from 0-4 rating customer satisfaction with the program. Contractor will have opportunity to review survey instrument prior to use.	Annual Reports

[1] Hard-to-reach definition from Decision 18-05-041, with reporting modifications as described in IOU sector level metric filings (PG&E, SoCalGas, SCE, and SDG&E). Reporting of HTR KPI is dependent upon IOUs provision of customer business size data to enable Contractor to determine both geographic and business size HTR criteria.

10	Service Delivery	Program Advisor-determined rating of 0 – 4, based on: - Timely response for out-of-scope requests - Proactive in continuous program delivery - On-time invoice and Monthly report - Quality of Deliverables - Willingness to partner - Communication	Monthly Reports
11	Supply Chain Responsibility: DBE Spend	To date DBE spending as percent of total spend / DBE % commitment compared to agreed goal	Monthly Reports

As described above in the Innovation section, each of the innovative program components have been designed to address barriers that have kept a majority of the CFS market from participating in POS and other downstream foodservice programs in California. By opening up the program to more design/build, online, and manufacture direct sales, the Program intends to significantly increase participation and energy savings compared to previous programs. The metrics that best track this include both of the goal accomplishment KPIs (#1-2) and the Participant Enrollment KPI (#7).

6. **For Programs claiming to-code savings**

This section is not applicable to the Program.

7. **Pilots**

This section is not applicable to the Program.

8. **Workforce Education and Training[2] (WE&T)**

The Program will provide trainings to participating equipment dealers and manufacturer representatives to participate in and promote the Program. The Program will work with CFS market publications, media outlets, and trade organizations to present information, articles, webinars, about efficient equipment options, new technologies, the importance of quality installation and maintenance practices, and energy-saving behaviors for commercial kitchens. The Program will utilize a subcontractor that specializes in workforce development and provides sustainability-related job opportunities and training to military veterans to perform in-person customer outreach to HTR and DAC areas. The Program will further support WE&T efforts by encouraging Program participants and customers to attend trainings offered through the IOU energy centers, California Energy Wise, Go Green California, other programs and partnerships across California.

[2] D.18-05-041, page 20-21 and Ordering Paragraph 7

9. **Workforce Standards**[3]

Though the prescriptive workforce standards as stated in D.18-10-008 do not directly apply to the Program (as no HVAC or lighting control measures are included), the Program recognizes the importance of having properly trained installers to ensure persistence of energy savings for foodservice equipment.

Quality installation is important to reduce the risk of lost lifecycle energy savings predominantly for foodservice equipment that relies on initial programming, such as combi ovens, steamers, rack ovens, and high-end fryers. This ensures that the customer understands the manufacturers energy saving features and they are programmed correctly for customer needs. For these types of equipment, the Program will recommend quality installations be completed by a manufacturer authorized service agent ("ASA") or a Commercial Food Equipment Service Association ("CFESA") Certified Technician. This recommendation will help ensure that work is done by professionals with recent experience in the industry. Most manufacturers require installation by a CFESA certified technician to maintain warranties and compliance is standard practice. For basic equipment, fryers, convection ovens, etc. installation by a standard plumber or electrician is sufficient and its highly unlikely that installation will impact energy use. However, most notably for fryers, regular maintenance is critical to maintain equipment's useful life.

10. **Disadvantaged Worker Plan**[4]

CPUC D.18-10-008 does not specifically apply to this Program because it does not include direct installations, repair, or maintenance of equipment.

For purposes of reporting on Disadvantaged Workers, the Program's collection of personal information from individuals working on the Program's implementation team beyond zip code shall be strictly voluntary, recorded in an anonymous manner, and cannot be used as a reason to include or exclude works from particular assignments or activities. When the Program seeks such information, it will be in a matter such that the workers do not feel compelled to provide any such personal information.

11. **Additional Information**

There is no additional information.

[3] D.18-10-008, Ordering Paragraph 1-2 and Attachment B, Section A-B, page B-1.
[4] D.18-10-008, Attachment B, Section D, page B-9.

Supporting Documents

Attach the following documents:

1. Program Manuals and Program Rules

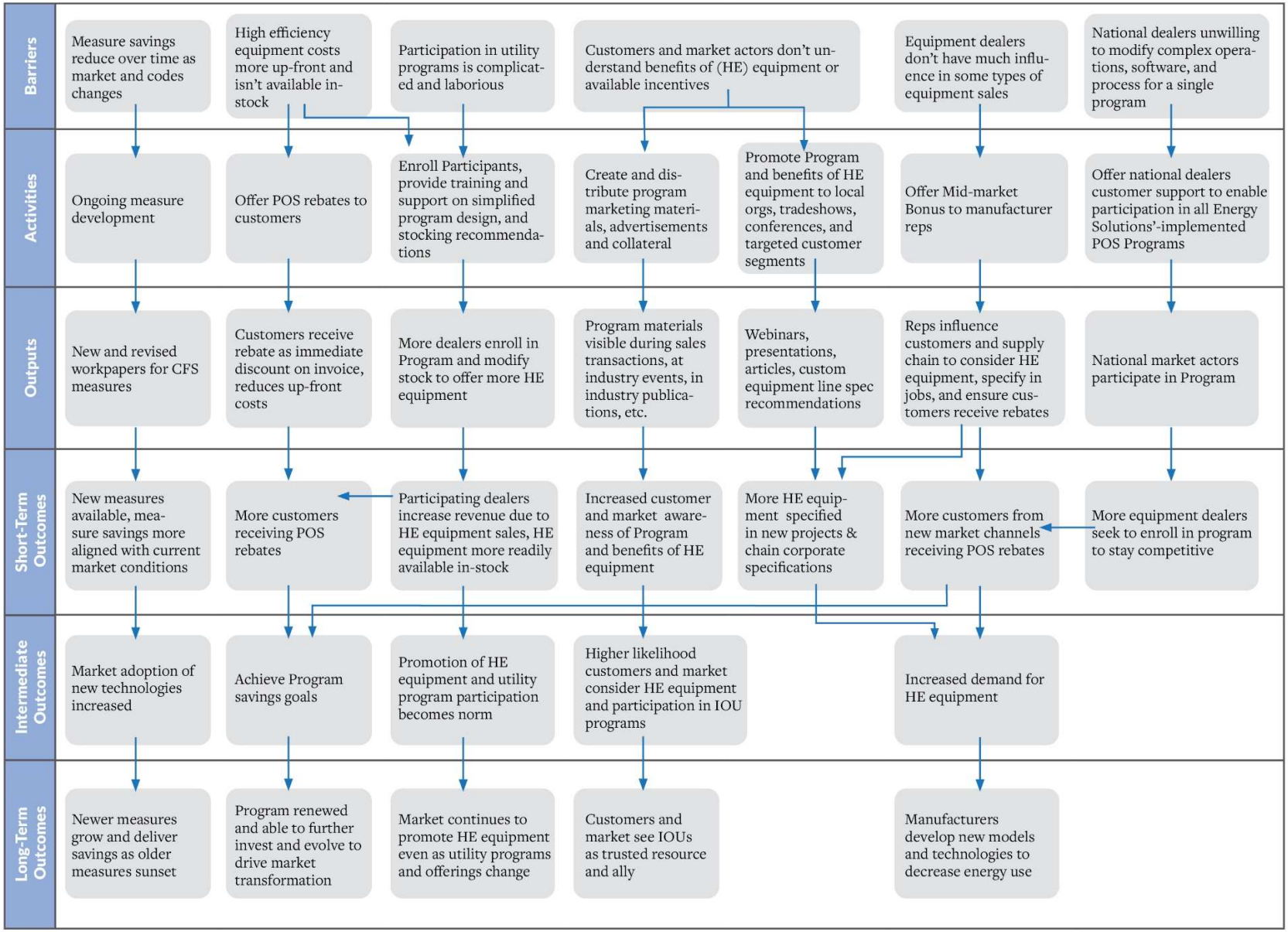
See Program Manual section below.

2. Program Theory[5] and Program Logic Model[6]

[5] The expected causal relationships between program goals and program activities in a way that allows the reader to understand why the proposed program activities are expected to result in the accomplishment of the program goals. A well-developed program theory can (and should) also describe the barriers that will be overcome in order to accomplish the goals and clearly describe how the program activities are expected to overcome those barriers. California Evaluation Framework, June 2004.

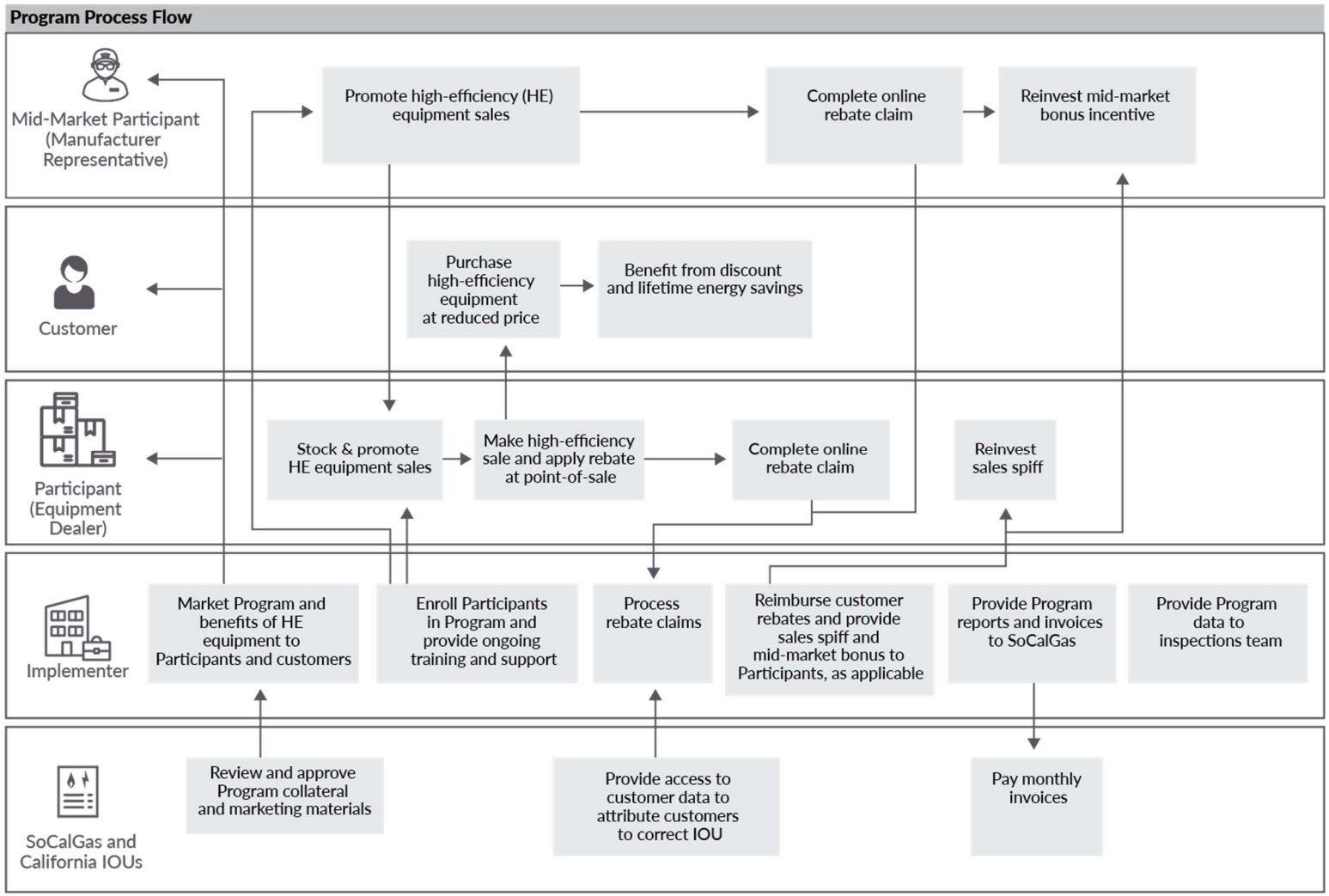
[6] The graphical representation of the program theory showing the flow between activities, their outputs, and subsequent short-term, intermediate, and long-term outcomes. California Evaluation Framework, June 2004.

Figure 1 – California Foodservice Instant Rebates Program Theory and Logic Model



3. Process Flow Chart

Figure 2 – California Foodservice Instant Rebates Program Process Flow



4. Incentive Tables, Workpapers, Software Tools

Table 2 - Program Measures, Eligibility, and Workpapers

Fuel Type	Deemed Measure Name	Measure Eligibility Criteria	Workpaper Source
Gas	Griddle, Commercial	≤ 15,000 Btu preheat, ≤ 12,408 Btu/hr idle rate, ≥ 46% cooking efficiency	SWFS004
Gas	Rack Oven, Gas, Commercial	≥ 50% cooking efficiency	SWFS014
Gas	Conveyor Oven, Gas, Commercial	≤ 57,000 Btu/hr idle rate, ≥ 42% cooking efficiency	SWFS008
Gas	Commercial Combination Oven, Gas, <15 pans	Convection mode: ≤ 13,000 Btu preheat, ≤ 8,000 Btu/hr idle rate, ≥ 44% cooking efficiency Steam mode: ≤ 15,000 Btu/hr idle rate, ≥ 38% cooking efficiency	SWFS003
Gas	Commercial Combination Oven, Gas, 15-28 pans	Convection mode: ≤ 16,000 Btu preheat, ≤ 10,000 Btu/hr idle rate, ≥ 44% cooking efficiency Steam mode: ≤ 18,000 Btu/hr idle rate, ≥ 38% cooking efficiency	SWFS003
Gas	Commercial Combination Oven, Gas, >28 pans	Convection mode: ≤ 24,000 Btu preheat, ≤ 16,000 Btu/hr idle rate, ≥ 44% cooking efficiency Steam mode: ≤ 28,000 Btu/hr idle rate, ≥ 38% cooking efficiency	SWFS003
Gas	Convection Oven, Commercial, Full-Size	≤ 12,000 Btu/hr idle rate, ≥ 46% cooking efficiency	SWFS001
Gas	Commercial Fryer, Gas, Tier 1	≤ 9,000 Btu/hr idle rate, ≥ 50% cooking efficiency	SWFS011
Gas	Commercial Fryer, Gas, Tier 2	≤ 6,100 Btu/hr idle rate, ≥ 60% cooking efficiency	Being Developed
Gas	Steamer, Commercial	≤ 10,294 Btu preheat, ≤ 1,221 Btu/hr idle rate, ≥ 46% cooking efficiency	SWFS005
Gas	Underfired Broiler, Commercial	≤ 22,000 Btu/hr/linear ft input rate	SWFS019
Both	Automatic Conveyor Broiler, Commercial, <20	The replacement automatic conveyor broiler must have a catalyst and an input rate less than 80 kBtu/hr or a dual stage or modulating gas valve with a capability of throttling the input rate below 80 kBtu/hr.	SWFS017
Both	Automatic Conveyor Broiler, Commercial, 20-26	The replacement automatic conveyor broiler must have a catalyst and an input rate less than 80 kBtu/hr or a dual stage or modulating gas valve with a capability of throttling the input rate below 80 kBtu/hr.	SWFS017
Both	Automatic Conveyor Broiler, Commercial, >26	The replacement automatic conveyor broiler must have a catalyst and an input rate less than 80 kBtu/hr or a dual stage or modulating gas valve with a capability of throttling the input rate below 80 kBtu/hr.	SWFS017
Electric	Griddle, Commercial	≤ 2.0 kWh preheat, ≤ 1.76 kW idle rate, ≥ 75% cooking efficiency	SWFS004
Electric	Deck Oven, Electric, Commercial	≤ 1.30 kW idle rate, ≥ 60% cooking efficiency	SWFS009
Electric	Combination Oven, Commercial, <15 Pan Models	Convection mode: ≤ 1.5 kWh preheat, ≤ 2.0 kW idle rate, ≥ 70% cooking efficiency Steam mode: ≤ 5.0 kW idle rate, ≥ 50% cooking efficiency	SWFS003
Electric	Combination Oven, Commercial, 15-28 Pan Models	Convection mode: ≤ 2.0 kWh preheat, ≤ 2.5 kW idle rate, ≥ 70% cooking efficiency Steam mode: ≤ 6.0 kW idle rate, ≥ 50% cooking efficiency	SWFS003
Electric	Combination Oven, Commercial, >28 Pan Models	Convection mode: ≤ 3.0 kWh preheat, ≤ 4.0 kW idle rate, ≥ 70% cooking efficiency Steam mode: ≤ 9.0 kW idle rate, ≥ 50% cooking efficiency	SWFS003

Electric	Convection Oven, Commercial, Full-Size	≤ 1.6 kW idle rate, ≥ 71% cooking efficiency	SWFS001
Electric	Fryer, Commercial	≤ 0.8 kW idle rate, ≥ 83% cooking efficiency	SWFS011
Electric	Commercial Hand-Wrap Machine, Electric	This measure is a new commercial on-demand hand-wrap machine that replaces a or always-on hand-wrap machine. The measure must use either a mechanical or optical control system.	SWFS010
Electric	Steamer, Commercial	≤ 1.78 kWh preheat, ≤ 0.29 kW idle rate, ≥ 70% cooking efficiency	SWFS005
Electric	Insulated Hot Food Holding Cabinet, Full	≤ 25 W/cf idle rate	SWFS007
Electric	Insulated Hot Food Holding Cabinet, Half	≤ 35 W/cf idle rate	SWFS007
Electric	Exhaust Hood Demand Controlled Ventilation, Commercial	The installation of a DCKV must include a temperature or optic sensor that senses cooking conditions. The control system must be used in conjunction with a variable-speed drive (VSD) on the fan motor. Installations in a new exhaust hood must have a total kitchen hood airflow ≤5,000 cfm. If installed in an existing exhaust hood >5,000 cfm, the existing hood must have been installed before July 1, 2014, when the 2013 California Building Energy Efficiency Standards (Title 24) standards came into effect. See Code Requirements	SWFS012
Electric	Glass Door Refrigerator - internal volume of 15-29.9 cf	≤ 0.05V + 1.12 kWh/day	SWCR018
Electric	Glass Door Refrigerator - internal volume of 30-49.9 cf	≤ 0.076V + 0.34 kWh/day	SWCR018
Electric	Glass Door Refrigerator - internal volume of 50 cf or more	≤ 0.105V - 1.111 kWh/day	SWCR018
Electric	Solid Door Refrigerator, <15 cf	≤ 0.022V* + 0.97 kWh/day	SWCR018
Electric	Solid Door Refrigerator - internal volume of 15-29.9 cf	≤ 0.066V + 0.31 kWh/day	SWCR018
Electric	Solid Door Refrigerator - internal volume of 30-49.9 cf	≤ 0.04V + 1.09 kWh/day	SWCR018
Electric	Solid Door Refrigerator - internal volume of 50 cf or more	≤ 0.024V + 1.89 kWh/day	SWCR018
Electric	Refrig Chef Base -Exterior Length 35 – 54 inches	≤ 1.5 kWh/day	SWFS016
Electric	Refrig Chef Base -Exterior 55 – 73 inches	≤ 2.4 kWh/day	SWFS016
Electric	Refrig Chef Base -Exterior Length 74 – 89 inches	≤ 2.9 kWh/day	SWFS016
Electric	Refrig Chef Base -Exterior Length 90 – 120 inches	≤ 3.9 kWh/day	SWFS016
Electric	Efficient Reach-In, Freezer, Glass, < 15 cf	≤ 0.095V + 0.445 kWh/day	SWCR018
Electric	Efficient Reach-In, Freezer, Glass, 15-29 cf	≤ 0.05V + 1.12 kWh/day	SWCR018
Electric	Efficient Reach-In, Freezer, Glass, 30-49 cf	≤ 0.076V + 0.34 kWh/day	SWCR018
Electric	Efficient Reach-In, Freezer, Glass, >50 cf	≤ 0.105V - 1.111 kWh/day	SWCR018
Electric	Solid Door Freezers with internal volume less than 15 cf	≤ 0.21V + 0.9 kWh/day	SWCR018
Electric	Solid Door Freezers with internal volume of 15–29.9 cf	≤ 0.12V + 2.248 kWh/day	SWCR018
Electric	Solid Door Freezers with internal volume of 30–49.9 cf	≤ 0.285V – 2.703 kWh/day	SWCR018
Electric	Solid Door Freezers with internal volume of 50 cf or more	≤ 0.142V + 4.445 kWh/day	SWCR018
Electric	Self-Contained Unit - producing up to 109 lbs/day	12.57 – 0.0399 x H kWh/100 lb of ice	SWFS006
Electric	Self-Contained Unit - producing up to 110 - 199 lbs/day	10.56 - 0.0215 x H kWh/100 lb of ice	SWFS006
Electric	Self-Contained Unit - producing up to 200 - 4000 lbs/day	4.13 kWh/100 lb of ice	SWFS006

Electric	Ice Maker Head Unit - producing up to 299 lbs/day	9.20 – 0.01134 x H kWh/100 lb of ice	SWFS006
Electric	Ice Maker Head Unit - producing 300 - 800 lbs/day	6.49 – 0.0023 x H kWh/100 lb of ice	SWFS006
Electric	Ice Maker Head Unit - producing 801 - 1500 lbs/day	5.11 – 0.00058 x H kWh/100 lb of ice	SWFS006
Electric	Ice Maker Head Unit - producing 1501 - 4000 lbs/day	4.24 kWh/100 lb of ice	SWFS006
Electric	Remote Condensing Unit - producing up to 987 lbs/day	7.17 – 0.00308 x H kWh/100 lb of ice	SWFS006
Electric	Remote Condensing Unit - producing 988 - 4000 lbs/day	4.13 kWh/100 lb of ice	SWFS006
Both	Door-Type Dishwashers High Temp Tier II	≤ 0.70 kW idle rate, ≤ 0.76 gallons per rack	SWFS002
Both	Undercounter Dishwasher, Commercial, High Temp, Tier 1	≤ 0.50 kW idle rate, ≤ 0.86 gallons per rack	SWFS018
Both	Undercounter Dishwasher, Commercial, Low Temp, Tier 1	≤ 0.50 kW idle rate, ≤ 1.19 gallons per rack	SWFS018
Both	Undercounter Dishwasher, Commercial, High Temp, Tier 2	≤ 0.43 kW idle rate, ≤ 0.73 gallons per rack	SWFS018
Both	Undercounter Dishwasher, Commercial, Low Temp, Tier 2	≤ 0.43 kW idle rate, ≤ 1.01 gallons per rack	SWFS018
Electric	ULT Freezer, 15 to <24 ft3	Upright ULT freezer designed for laboratory application that will maintain a setpoint storage temperature between -70 °C and -80 °C (-94 °F and -112 °F) ENERGY STAR® certification, or the maximum daily energy consumption (MDEC) of an ULT freezer at -75 °C (-103 °F) is 0.55 kWh/day/ft3	SWCR017
Electric	ULT Freezer, 24 to <29 ft3	Upright ULT freezer designed for laboratory application that will maintain a setpoint storage temperature between -70 °C and -80 °C (-94 °F and -112 °F) ENERGY STAR® certification, or the maximum daily energy consumption (MDEC) of an ULT freezer at -75 °C (-103 °F) is 0.55 kWh/day/ft3	SWCR017
Electric	Conveyor Toaster	≤ 3.75 W/bun	SWFS023

Table 3 - Incentive Table: Program Measures, Customer Rebates, and Mid-market Bonus

Fuel Type	Deemed Measure Name	Year 1 Customer Rebate	Year 1 Spiff	Year 1 Mid-market Bonus	Year 2-3 Customer Rebate	Year 2-3 Spiff	Year 2-3 Mid-market Bonus
Gas	Griddle, Commercial	$200	$50		$100	$25	
Gas	Rack Oven, Gas, Commercial	$2,500	$200		$2,500	$400	
Gas	Conveyor Oven, Gas, Commercial	$1,400	$100	$200	$1,000	$50	$150
Gas	Commercial Combination Oven, Gas, <15 pans	$1,500	$200	$300	$1,100	$200	$300
Gas	Commercial Combination Oven, Gas, 15-28 pans	$2,000	$200	$300	$1,500	$200	$300
Gas	Commercial Combination Oven, Gas, >28 pans	$3,000	$200	$300	$2,500	$200	$300
Gas	Convection Oven, Commercial, Full-Size	$700	$50		$500	$50	
Gas	Commercial Fryer, Gas, Tier 1	$900	$50		$750	$50	
Gas	Commercial Fryer, Gas, Tier 2	$1,400	$50	$100	$1,200	$50	$100
Gas	Steamer, Commercial	$2,000	$200	$200	$1,500	$100	$100
Gas	Underfired Broiler, Commercial	$650	$100		$650	$50	
Both	Automatic Conveyor Broiler, Commercial, <20	$2,000	$200	$200	$2,000	$100	$150
Both	Automatic Conveyor Broiler, Commercial, 20-26	$2,500	$200	$200	$2,000	$100	$150
Both	Automatic Conveyor Broiler, Commercial, >26	$4,000	$200	$200	$3,000	$100	$150
Electric	Griddle, Commercial	$200	$50		$150	$50	
Electric	Deck Oven, Electric, Commercial	$1,500	$200	$300	$1,250	$100	$100
Electric	Combination Oven, Commercial, <15 Pan Models	$1,500	$200	$300	$1,350	$100	$300
Electric	Combination Oven, Commercial, 15-28 Pan Models	$2,000	$200	$300	$1,400	$100	$300
Electric	Combination Oven, Commercial, >28 Pan Models	$3,000	$200	$300	$3,000	$200	$300
Electric	Convection Oven, Commercial, Full-Size	$750	$50		$750	$50	
Electric	Fryer, Commercial	$650	$50		$650	$50	
Electric	Commercial Hand-Wrap Machine, Electric	$125	$25		$125	$25	
Electric	Steamer, Commercial	$2,000	$200	$200	$2,000	$100	$100
Electric	Insulated Hot Food Holding Cabinet, Full	$750	$50		$750	$50	
Electric	Insulated Hot Food Holding Cabinet, Half	$200	$50		$200	$50	
Electric	Exhaust Hood Demand Controlled Ventilation, Commercial	$700	$50	$100	$700	$25	$50
Electric	Glass Door Refrigerator - internal volume of 15-29.9 cf	$70	$50		$70	$50	
Electric	Glass Door Refrigerator - internal volume of 30-49.9 cf	$100	$50	$100	$70	$50	
Electric	Glass Door Refrigerator - internal volume of 50 cf or more	$100	$50	$100	$100	$50	

Electric	Solid Door Refrigerator, <15 ft^3	$70	$50		$70	$50	
Electric	Solid Door Refrigerator - internal volume of 15-29.9 cf	$70	$50		$70	$50	
Electric	Solid Door Refrigerator - internal volume of 30-49.9 cf	$70	$50		$70	$50	
Electric	Solid Door Refrigerator - internal volume of 50 cf or more	$100	$50		$100	$50	
Electric	Refrig Chef Base -Exterior Length 35 – 54 inches	$250	$50	$100	$250	$50	
Electric	Refrig Chef Base -Exterior 55 – 73 inches	$250	$50	$100	$250	$50	
Electric	Refrig Chef Base -Exterior Length 74 – 89 inches	$250	$50	$100	$250	$50	
Electric	Refrig Chef Base -Exterior Length 90 – 120 inches	$500	$50	$100	$250	$50	
Electric	Efficient Reach-In, Freezer, Glass, < 15 cf	$30	$25		$30	$25	
Electric	Efficient Reach-In, Freezer, Glass, 15-29 cf	$70	$50		$70	$50	
Electric	Efficient Reach-In, Freezer, Glass, 30-49 cf	$100	$50	$100	$100	$50	$100
Electric	Efficient Reach-In, Freezer, Glass, >50 cf	$300	$50	$100	$300	$50	$100
Electric	Solid Door Freezers with internal volume less than 15 cf	$70	$25		$70	$25	
Electric	Solid Door Freezers with internal volume of 15–29.9 cf	$100	$50		$100	$50	
Electric	Solid Door Freezers with internal volume of 30–49.9 cf	$100	$50		$100	$50	
Electric	Solid Door Freezers with internal volume of 50 cf or more	$350	$50		$350	$50	
Electric	Self-Contained Unit - producing up to 109 lbs/day	$70	$50		$70	$50	
Electric	Self-Contained Unit - producing up to 110 - 199 lbs/day	$70	$50		$70	$50	
Electric	Self-Contained Unit - producing up to 200 - 4000 lbs/day	$100	$50		$100	$50	
Electric	Ice Maker Head Unit - producing up to 299 lbs/day	$100	$50		$100	$50	
Electric	Ice Maker Head Unit - producing 300 - 800 lbs/day	$100	$50		$100	$50	
Electric	Ice Maker Head Unit - producing 801 - 1500 lbs/day	$250	$50		$250	$50	
Electric	Ice Maker Head Unit - producing 1501 - 4000 lbs/day	$250	$50		$250	$50	
Electric	Remote Condensing Unit - producing up to 987 lbs/day	$250	$50		$250	$50	
Electric	Remote Condensing Unit - producing 988 - 4000 lbs/day	$250	$50		$250	$50	
Both	Door-Type Dishwashers High Temp Tier II	$650	$50	$100	$650	$50	$100
Both	Undercounter Dishwasher, Commercial, High Temp, Tier 1	$300	$100	$100	$200	$50	
Both	Undercounter Dishwasher, Commercial, Low Temp, Tier 1	$50	$25		$50	$25	
Both	Undercounter Dishwasher, Commercial, High Temp, Tier 2	$600	$100	$100	$500	$50	
Both	Undercounter Dishwasher, Commercial, Low Temp, Tier 2	$150	$50		$150	$50	
Electric	ULT Freezer, 15 to <24 ft3	$1,200	$100		$1,200	$100	
Electric	ULT Freezer, 24 to <29 ft3	$1,200	$100		$1,200	$100	
Electric	Conveyor Toasters	$600	$50		$500	$50	

Program measure tables will be updated as new measures are added.

Table 4 - HTR & DAC Financing Incentives

Deemed Measure	HTR & DAC Financing Incentive	Customer Eligibility
All deemed measures are eligible	13% of the retail price of the equipment before the POS rebate is applied, not to exceed the POS rebate amount	Customers must meet the HTR or DAC definitions outlined in Decision 18-05-41 of Resolution G-3497 and be financing equipment for a non-new construction project

Table 5 - Participant Enrollment Bonus

Participating Dealer Approved Customer Rebate Claims within 6 months of Enrollment Date	Enrollment Bonus Amount
$5,000-$9,999	$1,000
$10,000-$14,999	$2,000
$15,000-$19,999	$3,000
$20,000+	$4,000

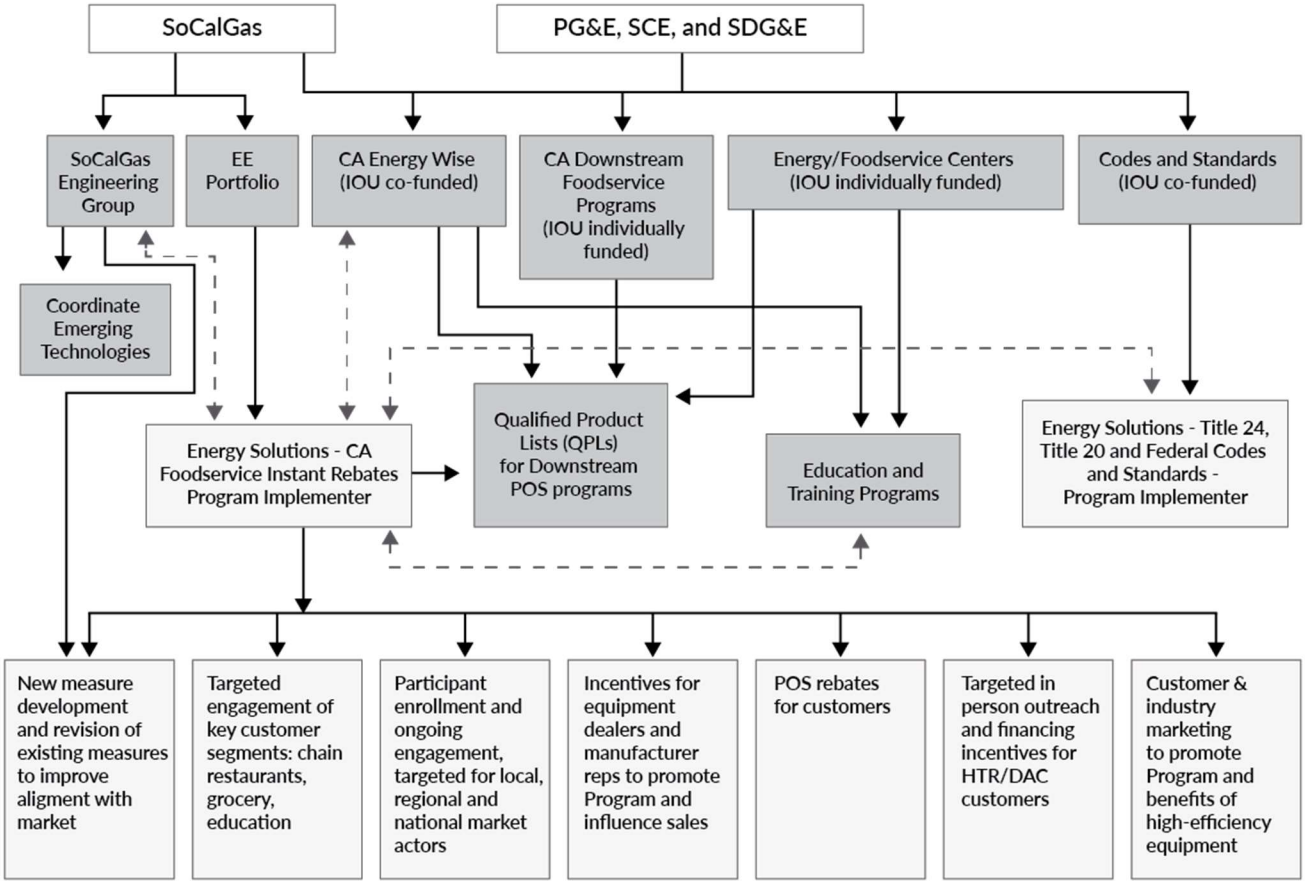
5. Quantitative Program Targets

Table 6 - Quantitative Program Targets

Deliverable	Year 1	Year 2	Year 3	Total
Gross Therm Savings	1,937,444	2,982,037	4,012,382	8,931,863
Gross kWh Savings	4,812,234	10,056,870	13,167,390	28,036,494
Gross kW Reduction	871	1,878	2,433	5,182
Gross Gallons Saved	30,867,488	48,533,696	61,247,008	140,648,192
Net Therm Savings	1,195,702	1,855,464	2,501,366	5,552,532
Net kWh Savings	3,111,071	6,476,249	8,517,005	18,104,325
Net kW Reduction	561	1,202	1,564	3,327
Net Gallons Saved	31,041,422	52,171,801	65,631,945	148,845,168
Non-resource Deliverable(s):				
Workpapers	5	8	2	15
Market Education Activities	298	295	257	850
Participation Measured by Units	8,354	10,611	13,979	32,944
Hard-to-Reach ("HTR") Customers	161	204	269	634
Disadvantaged Community ("DAC") Customers	1,607	2,041	2,688	6,336
Total Number of Customers	6,426	8,162	10,753	25,341
Area(s) Served	Climate Zones: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16			

6. Diagram of Program

Figure 3 – California Foodservice Instant Rebates Program Diagram



7. Evaluation, Measurement & Verification (EM&V)

The Program will use DEEMED Measure Recording and Verification. The DEEMED measure savings for each approved Program measure are inputted into the SoCalGas reporting system and reviewed for accuracy. As part of the monthly reporting and invoicing process, customers measure installation data is inputted into the SoCalGas reporting system and the project specific DEEMED savings are calculated for each project. In the event that reported quantities vary from inspected quantities, the correct quantities are reported to SoCalGas and invoice adjustments are made.

SoCalGas EM&V supports the Program to ensure that DEEMED measures are being implemented in the field following the workpaper guidance. SoCalGas EM&V also notifies the implementer of DEEMED workpaper updates that need to be implemented.

The SoCalGas program advisor will coordinate with the Program and with SoCalGas Policy in order to report DEEMED savings for evaluation studies and data requests.

8. Normalized Metered Energy Consumption (NMEC)

NMEC is not utilized in the Program.

Program Manual

1. Eligible Measures or measure eligibility, if applicable

Please see the following tables above in the Implementation Plan

Table 2 - Program Measures, Eligibility, and Workpapers

Table *3 - Incentive Table: Program Measures, Customer Rebates, and Mid-market Bonus*

Table 4 - HTR & DAC Financing Incentives

Table 5 - Participant Enrollment Bonus

2. Customer Eligibility Requirements

Customer eligibility requirements include, but are not limited to the following:

- A qualifying customer who receives service from a CA IOU on a non-residential rate schedule
- Customer has been verified through use of Program-provided zip code lookup tool
- Customer location is permanent and is not a food truck or other mobile facility
- Customer must purchase rebate-qualified equipment from a qualifying program participant, or from a contractor that purchased the equipment from a qualifying, enrolled program participant
- Customer has not applied for or received an incentive for the same measure in previous five years
- Customer may not receive an incentive for the piece of equipment from any other CA IOU programs, including online, mail-in, deemed, or customized program incentives

Please refer to the Program's Dealer Participation Agreement ("DPA") and Mid-market Participation Agreement ("MMPA") for additional information on customer eligibility.

In order to be eligible for the HTR & DAC Financing Incentives, customers must meet the HTR & DAC definitions outlined in Decision 18-05-41 of Resolution G-3497 and be financing equipment for a non-new construction project. When offering HTR & DAC Financing Incentives for a non-new construction project, Participant will verify customer eligibility with the Program team.

3. Contractor Eligibility Requirements

This section is not applicable to the Program.

4. Participating Contractors, Manufacturers, Retailers, Distributors, and Partners

The Program works with midstream market actors to offer POS rebates to CA IOU end-use customers. Program Participants ("Participants") include commercial foodservice equipment dealers, manufacturers, and manufacturer representatives, contractors, and distributors who make sales directly to end-use customers, or to contractors that sell to end-use customers. Participants will be expected to supply supporting sales documents that satisfy the needs of the Program and must sign the appropriate Program participation agreement to enroll.

Detailed eligibility requirements for Participants are provided in the Program's Dealer Participation Agreement ("DPA") and Mid-Market Participation Agreement ("MMPA").

In order to be eligible for Participating Dealer Enrollment Bonus Incentives, qualifying enrolled dealers must meet the following requirements:

- Sign and return the Dealer Participation Agreement (DPA)
- Participate in all Program-provided trainings
- Followed all Program requirements for eligible POS rebate sales and submit reimbursement claims via the online application system
- Meet the minimum threshold for total approved rebate claim submittals within six months of signing DPA
- Be a "new" participating dealer. Participants enrolled in the 2020 SoCalGas POS Instant Rebate program will not be eligible for the enrollment bonus. This ineligibility extends to enrolled participants that have sister stores or subsidiary companies that were enrolled in the 2020 SoCalGas POS Instant Rebate program.
- Maintain good standing in Program during the six-month enrollment period

5. Additional Services

Special marketing and outreach efforts and services will be provided on an ad-hoc basis when deemed necessary at the CA IOU's request. Marketing and outreach campaigns will be monitored and adjusted based on changes in market preferences, campaign performance, and emerging opportunities that may emerge over the course of the Program. The Program will monitor all campaigns for effectiveness and may realign objectives and activities based on performance and market conditions.

6. Audits

This section is not applicable to the program.

7. Sub-Program Quality Assurance Provisions

Please refer to the Quality Assurance ("QA") Plan for details.

8. Other Program Metrics

There are no other Program metrics.

Appendices

1. Dealer Participation Agreement ("DPA")
2. Mid-market Participation Agreement ("MMPA")
3. Quality Assurance ("QA") Plan