



**OPEN DOORS TO EFFICIENCY PROGRAM FOR MONTEREY,  
SAN BENITO AND SANTA CRUZ COUNTIES**

A Local Information and Hardware Residential Hard to Reach Program

**R.01-08-028 / 2004-2005 Energy Efficiency Proposal**

*Presented to:*

**Public Utilities Commission of the State of California**

*Presented by:*

**Community Action Board of Santa Cruz County, Inc./Energy  
Services**

*Other Programs Proposed:*

**None**

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## I. PROGRAM OVERVIEW

### A. Program Concept

The Open Doors To Efficiency Program is a comprehensive cost effective community-based system to focus energy saving resources on hard to reach households and dwellings most in need Monterey, San Benito And Santa Cruz Counties in the most cost effective manner. It is based on a continuous cycle of targeting areas through a process of community collaboration of government and service organizations, pinpointing households and dwellings in need by engaging managers and owners of multi-unit complexes and mobile home parks and neighborhood leaders and then personally influencing energy use by delivering information on saving energy and installing free energy saving measures.

This program is a locally owned and operated version of the Low Income Energy Efficiency Program (LIEE) implemented by the CPUC, but serves moderate-income dwellings.

### B. Program Rationale

They don't call them hard to reach for nothing. This system gets the people who can provide help, to the doors of people who would not otherwise access or implement energy saving measures in their home. The target is people who don't have the time or money for short-term investment in measures that would render long-term savings and the system is designed to cross the barriers in reaching customers whose primary language is not English, have low or moderate incomes, who are Multi-Family and Mobile Home tenants, and rent homes. This system is a development of our collective experience and expertise in serving low-income households and it builds on that strength. Energy efficiency services to low-income households are part of this system proposal, but are not included for funding. Funding for low-income safety and energy saving measures is leveraged for cost effective service delivery through this system.

### C. Program Objectives

1. Install free energy saving measures in 1152 dwellings of households that do not qualify for low-income programs (above low income program income guidelines and less than 400% of federal poverty guidelines) in targeted areas of Monterey, San Benito and Santa Cruz counties.
2. Encourage habitual energy conservation through personal delivery (to the doorstep) of information and advice on relevant ways to save energy to 2600 households in multi-unit complexes and mobile home parks and to 200 neighborhood households.
3. Promote energy conservation rebates offered by Pacific Gas and Electric Company and conservation incentives available from local governments and utilities.
4. Use existing local networks of people to promote and market the program.
5. Leverage existing resources and programs in a cost effective market identification and delivery system.

## II. PROGRAM PROCESS

### A. Program Implementation

#### Community Integration – Local Government

The first element in the Opening Doors to Efficiency system is to involve local government in program implementation. This will be accomplished through a partnership with the Association of Monterey Bay Area Governments (AMBAG). This involvement will contribute to the success of the program by 1) Identifying geographic areas of the greatest need, 2) Allowing opportunities to combine conservation outreach efforts with local initiatives, 3) Accept ongoing direction on program implementation and improvement. AMBAG is a partner in this proposal and will coordinate meetings and joint efforts with key local officials and staff in the region.

#### Community Integration – Community and Faith Based Organizations

The second element is to involve Community and Faith Based Organizations. This will be accomplished through the established network of these organizations, of which the Community Action Board of Santa Cruz County, Inc./Energy Services is a part. Energy Services is an important part of the network of agencies and organizations in Monterey San Benito and Santa Cruz counties who specialize in services for individuals who are underserved or hard to reach. This existing network of exchange and referral will be used to identify households in greatest need and take advantage of combined outreach efforts. From this effort, neighborhoods, multi unit complexes and mobile home parks will be pinpointed for door-to-door outreach. Energy Services' existing resources to develop and accept referrals will be expanded. Energy Services staff making mail contacts followed by phone contacts of established and new community and faith-based partners. Energy Services' low-income program provides a base of service from which moderate-income households may be identified and served. Using this network of providers will help identify those who are not eligible for free low-income payment assistance and weatherization services, but are not well off enough to afford energy saving measures.

#### Targeting Multi-Unit Complexes, Mobile Home Parks and Neighborhoods

The third element in the Opening Doors to Efficiency system is to involve managers and owners of multi-unit complexes and mobile home parks and neighborhood leaders identified from the community integration processes. In the existing system in use at Energy Services, key people of influence are contacted to arrange on-site service clinics, door-to-door visits and coordination of weatherization services. An assessment of overall household eligibility is made and property owner agreements (waivers) are acquired to the extent possible at this point. This element is necessary to make the contact with the household as effective as possible. The ability to offer a broad array of free services helps ensure cooperation in cost effective delivery of services.

#### The Open Doors

Door to door visits will be made to pinpointed households. A hard to reach household or dwelling cannot be identified by any means other than by collecting income information directly from the customer. In the course of each contact during which this information is requested and collected, habitual energy saving will be encouraged through relevant brochures reinforced with personal advice from Customer Service Workers. Available

PG&E rebates and local conservation incentives will also be promoted at any contact. No opportunity will be missed to encourage conservation. Free energy efficiency measures will be offered through either the Low-income or Moderate-income program depending on eligibility. Under the Open Doors To Efficiency Program, an energy auditor will be scheduled to perform a survey and install needed measures according to the California State Department of Community Services and Development Weatherization Installation Standards:

- Compact Fluorescent Lights
- Programmable Thermostat
- Caulking
- Weatherstripping
- Switch and Outlet Gaskets
- Hot Water Faucet Restrictors
- Low Flow Showerheads
- Water Heater Blanket
- Water Heater Pipe Wrap

The experienced staff of Energy Services served over **5111** low-income households with **\$1,043,205.54** for utility payment assistance (HEAP), and weatherized over **1324** homes (**\$1,135,671.70** value) in calendar year 2002. The Open Doors To Efficiency Program will leverage these services and the concomitant energy savings in the region and reach those who are just above the income eligibility criteria with cost effective energy conservation information and service.

This program uses existing resources as a base to provide energy savings to more households without middle managers and handlers. It is the community working on a program that makes sense for their community.

## **B. Marketing Plan**

The Marketing Plan is described in the Community Integration sections above. It is very simply people working together to promote the program through the network that does the same for other community programs and services. It is a plan of easy integration, not brash intrusion. It is not a shotgun approach, but carefully directed at pinpointing households most in need and best served. It is one person in the community contacting another for results.

## **C. Customer Enrollment**

All customers contacted will receive energy saving information and PG&E and local conservation rebate information and referrals. In the course of contacts made through on-site clinics and door-to-door visits, residents will be asked to apply (and will be assisted in this) for the Home Energy Assistance Program (HEAP). Income eligibility will be determined from this application process. Those households with an income of less than 60% of state median income will be served with the federal funded programs administered by Energy Services (HEAP, LIHEAP Wx, DOE) based on funding availability. Enrollment in the reduced rate CARE program is part of this service. Current guidelines are shown below:

<b>Income Guidelines</b> <b>60% of State Median Income</b>
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Size of Household	Monthly	Annual
1	\$1,643.33	\$19,720.00
2	\$2,149.00	\$25,788.00
3	\$2,654.66	\$31,856.00
4	\$3,160.33	\$37,924.00
5	\$3,665.91	\$43,991.00
6	\$4,171.58	\$50,059.00
<b>Additional Family Member Amounts</b>	\$94.84	\$1138.00

Those households above this income level and below 400% of the Federal Poverty Level will be served with Open Doors To Efficiency Program funding. In either case a Property Owner Waiver (called a Weatherization Service Agreement by Energy Services) will be obtained before any measures are installed. To prevent double dipping, Energy Services will include a message that states, “a functional high-efficiency measure will not be replaced” in its application and waiver forms and will assure that this policy will be followed. Services will be provided regardless of ownership.

**D. Materials**

Materials will meet or exceed the standards set by the California State Department of Community Services and Development Weatherization Installation Standards and will be installed accordingly also.

**E. Payment of Incentives**

Incentives will not be paid directly to customers, but will be received as installed energy efficiency measures.

**F. Staff and Subcontractor Responsibilities**

Staff	Responsibility
Program Director	Program oversight, local government liaison, administration
Asst Program Director	Direct services supervision, administration
Home Services Manager	Measures installation supervision, materials procurement, scheduling supervision
Grants & Contracts Manager	Contract compliance monitoring, reporting, administration
Marketing and Outreach Manager	Outreach coordination with community partners, organization and planning of on-site and door-to-door visits with owners and managers, development of community relevant outreach materials, personal contact with customers, customer energy saving habit encouragement,

	eligibility determination,
Training Manager	Assist in organization of on-site and door-to-door visits, staff training and evaluation, HR
Office Manager	Scheduling and
Home Services Crew Leaders	Supervision and Installation of measures and customer energy saving habit encouragement
Customer Service Workers	Outreach, personal contact with customers, customer energy saving habit encouragement, eligibility determination, scheduling of measure installation
Home Services Tech	Installation of measures, energy saving habit encouragement
Network Manager	IT, database and reporting automation development and maintenance
AMBAG Subcontractor	Coordinate meetings and joint efforts with key local officials and staff in the region.
E M & V Subcontractor	Evaluation, measurement and verification

**G. Work Plan and Timeline for Program Implementation**

<b>Milestone</b>	<b>Date</b>
Contract Execution	Dec-03
Program Start	Jan-04
EM&V Plan	Feb-04
Start local government planning meetings/Monterey County & Cities	Jan-04
Start Community and Faith Based Organization Visits and meetings	Jan-04
Start Multi Unit Complex and Mobile Home Park Owner/Manager Contact	Feb-04
Start On site and door to door visits	Mar-04
Measure installation	Mar-04
Start local government planning meetings/San Benito County & Cities	Apr-04
Start local government planning meetings/San Benito County & Cities	May-04
Program Goals 50% Completed	Jan-05
Program completion	Dec-05

### III. CUSTOMER DESCRIPTION

#### A. Customer Description

This proposal will cross the barriers to reaching customers whose primary language is not English (predominantly Spanish), have low or moderate incomes, who are Multi-Family and Mobile Home tenants, rent homes and live in mostly rural areas.

#### B. Customer Eligibility

Households with incomes above 60% of the State median income level and below 400% of the Federal Poverty Level will be served with Open Doors To Efficiency Program funding. LIHEAP documentation and income verification standards will be used for eligibility verification.

#### C. Customer Complaint Resolution

If a customer should have any questions, complaints or disputes regarding the Program, the appropriate Program staff person will seek to answer and resolve the customer's questions or complaints within 3 working days. If customer believes their questions or complaints have not been answered or resolved, the customer will be asked to provide a written description of the issue that will be provided to the Program Director for detailed review and consideration. The Program Director will make a determination concerning the complaint within 10 working days of receipt. If the Program is determined to be at fault, the Program Director will remedy the claim at no cost to the customer. In the event the customer is not satisfied, the customer will be offered the opportunity for mediation and/or binding arbitration using the services of the local Ombudsman services. If that option is not satisfactory to the customer, and the complaint remains unresolved, the dispute resolution outlined by the Agreement will be used.

#### D. Geographic Area

Monterey, San Benito and Santa Cruz counties.

### IV. MEASURE AND ACTIVITY DESCRIPTIONS

#### A. Energy Savings Assumptions

<b>Measure to be Installed</b>	<b>Gross Coincidental Peak Demand Reduction</b>
LOW FLOW SHOWERHEAD	0.005734638
HOT WATER FAUCET RESTRICTORS	0.0022818
DOOR WEATHERSTRIPPING*	0
WATER HEATER BLANKET	0.01010274
WATER HEATER PIPE WRAP	0.003048141
SWITCH OUTLET GASKETS*	0
CAULKING*	0

REFRIGERATOR REPLACEMENT	0.075924658
CFL THREAD BASED	0.0015
SETBACK THERMOSTAT*	0

\*Heating

The energy savings potential for these measures are well documented in relation to LIEE programs. Reports used include the *Impact Evaluation Of The 2001 Statewide Low-Income Energy Efficiency (LIEE) Program, March 19, 2003, Joint Utility LIEE Program Costs and Bill Savings Standardization Report March 5, 2001* and the *Senate Bill 5x Legislative Report for the California Low-Income Home Energy Assistance Program (CAL LIHEAP)*.

#### B. Deviations in Standard Cost-effectiveness Values

None.

#### C. Rebate Amounts

This is an information and hardware installation proposal. Referrals will be made to relevant PG&E rebate programs.

#### D. Activities Descriptions

Each eligible dwelling will receive a free assessment of existing energy efficiency measures and where the dwelling is lacking these functional measures, the following will be installed free of charge:

- Compact Fluorescent Lights (Maximum of 5)
- Programmable Thermostat
- Caulking
- Door Weatherstripping
- Switch and Outlet Gaskets
- Hot Water Faucet Restrictors
- Low Flow Showerheads
- Water Heater Blanket
- Water Heater Pipe Wrap

During the course of the visit by the installation crew, the occupant(s) will be encouraged to develop energy saving habits and to take advantage of any conservation rebates or incentives available locally. No opportunity will be missed to repeat this message.

## V. GOALS

Measure to be Installed	Projected Dwellings	Projected Measures Installed	Annual KWh Savings	Total Annual KWh	Annual Therms	Total Ann Therms	NTG
LOW FLOW SHOWERHEAD	682	835	66.6	55616.51	7.2	6012.60	59%
HOT WATER FAUCET RESTRICTORS	959	1818	26.5	48173.76	2.6	4726.48	83%
DOOR WEATHERSTRIPPING*	671	1016	14.1	14331.26	1.6	1626.24	58%
WATER HEATER BLANKET	107	107	88.5	9510.45	9.2	988.66	9%
WATER HEATER PIPE WRAP	91	269	35.4	9517.36	3.6	967.87	8%
SWITCH OUTLET GASKETS*	667	667	0.8	533.64	7.5	5002.88	58%

CAULKING*	673	673	9.9	6665.70	1.5	1009.95	58%
REFRIGERATOR REPLACEMENT	403	403	665.1	268168.32	0	0.00	35%
CFL THREAD BASED	859	2576	16.4	42239.64	0	0.00	75%
SETBACK THERMOSTAT*	516	516	1	515.82	1.8	928.48	45%

## VI. PROGRAM EVALUATION, MEASUREMENT AND VERIFICATION (EM&V)

Evaluating program success and measuring and verifying energy & peak demand will be accomplished in conjunction with approved consultants. Every effort will be made to use standardized methodologies for comparison to other programs. The final, detailed EM&V plan for the program, will be developed by the independent EM&V consultant, but it should be focused on making recommendations for improvements on the measurement, evaluation and verification process that may be made in the course of the program.

Two potential EM&V contractors would be Quantec LLC and Xenergy, Inc.

## VII. QUALIFICATIONS

### A. Primary Implementer

The Energy Services program of the Community Action Board provides energy assistance and weatherization services to the low-income population of Monterey, San Benito and Santa Cruz Counties, with funding from the Low Income Home Energy Assistance Program (LIHEAP), the Department of Energy (DOE) and the County of San Benito. In addition, Energy Services has participated in a partnership with the California Conservation Corps since June 1998, with funding by the California State Department of Community Services and Development. Energy Services has successfully completed two Third Party contracts with PG&E and is in the process of completing an LIEE refrigerator replacement contract for the region.

### B. Subcontractors

The Association was organized for the permanent establishment of a forum for planning, discussion and study of regional problems of mutual interest and concern to the counties and cities in Monterey, San Benito, and Santa Cruz Counties; and for the development of studies, plans, policy and action recommendations. AMBAG's Board of Directors is composed of locally elected officials appointed by their respective city council or board of supervisors. Each member city has one representative on the Board, while each member county has two. The AMBAG Board of Directors sets policy and oversees a small professional staff. AMBAG's funding comes primarily from the state and federal governments for mandated planning activities and grant projects. Local funding comes primarily from annual membership dues contributed by each member agency.

### C. Resumes or Description of Experience

Patricia Frias. Outreach and Marketing Manager

Professional Experience

## Outreach Manager

08/01-Present

*Energy Services, Watsonville, CA*

As an Outreach Manager I coordinate the execution of a wide range of Outreach activities supporting the agency's delivery of energy payment assistance and home weatherization programming to low-income households for this region. Working collaboratively with other Energy Services managers, the Outreach Manager drives effective media and community relations programming to maximize the support and involvement of community based organizations, educational institutions, public agencies and private businesses in meeting the energy needs of the region's low-income residents.

## Office Manager

07/00-08/01

*Energy Services, Watsonville, CA*

Working with limited supervision and within a framework of standard policies and procedures, the Office Manager is responsible for supervising and coordinating office operations and contributes significantly to the accomplishment and continual refinement of the mission and goals of Energy Services. The Office Manager is responsible for training, scheduling, supervising and evaluating Customer Services Workers and is expected to perform a wide variety of moderate to difficult clerical, record keeping and customer services duties with only occasional direction or assistance

## Customer Service Worker

03/97-07/00

*Energy Services, Watsonville, CA*

The Customer Service Worker duties include the delivery of energy payment assistance and home weatherization programming to qualified households for this region by providing customer service, telephone inquiry response, aiding customers with filling out forms, eligibility determination, making calculations on income, typing, filing, translation of written materials, record keeping, computer data input, training part time employees/volunteers, visiting satellite sites for customer service, and other related duties.

## Dental Assistant

05/94-11/96

*Dr Marc Grossman, Watsonville, CA*

Assisted doctors during operatives. Worked closely with patients during operative visits and gave postoperative instructions. Performed dental cleanings on children. Educated children and parents on dental hygiene. Took and developed x-rays, set-up rooms and trays. Followed very strict OSHA cleaning and sterilization procedures.

## Sales Associate

10/87-02/93

*Ford's Department Store, Watsonville, CA*

As a Sales Associate the primary focus was customer service. Aiding the customer in finding what they want. Performing sales transaction, record keeping on inventory,

experienced with cash register, ten-key, debit machine, training part time employees/volunteers, arranging displays and other related duties.

Part-time or temporary employments

1987- 1997

- *Office assistant- Manpower, 1997*
- *Hair Stylist-Victor's Precision Edge, 1992*
- *Cashier-Santa Cruz Beach Boardwalk, 1987*

Education

1997-1998 Cabrillo College- Prerequisites for Dental Hygiene Program

1993-1994 Santa Cruz ROP Dental Assistant Training- Certificate

1990-1991 Jon-et Dee's School of Cosmetology- Certificate- State License

1988-1989 Cabrillo College – General Education

1984-1988 Watsonville High School- Diploma

John B Farrow\_Home Services Manager

### **I. Experience**

Home Services Manager from 9/00 to present. Responsibilities include supervising crews to insure weatherization work is performed to customer's satisfaction while complying with state standards of workmanship. Manage inventory of weatherization supplies and establish vendor relationships for procuring materials acceptable under state standards while meeting budget constraints. Implement new work measures and train crews to perform tasks in compliance with contracts and any local code requirements. Review all completed jobs for contract compliance and fiscal reporting. In addition monitor crew's performance for maintaining personnel requirements and evaluation criteria

Facilities Supervisor from 6/98 to 9/00. I was responsible for performing routine maintenance and turnovers for 2 apartment complexes while supervising maintenance functions at 2 other multi-unit facilities. I performed, in conjunction with sub-contractors, all turnover requirements to upgrade apartment units in a timely manner. I monitored safety and security measures at the properties for performance and reporting requirements. I also purchased materials and coordinated sub-contractors to complete work on large-scale renovation projects.

Owner/Technician mainframe maintenance company from 3/74 to 6/98. I operated a franchise for maintaining 14in rigid media on IBM and CDC mainframe computers.

### **Accomplishments**

Instrumental in the reorganization of Home Services into a provider that doubled its provider capacity in weatherization services for the elderly and financially disadvantaged in three counties.

Designed and built my home which was later featured in Fine Homebuilding and Sunset Magazines. Built a 1500sq/ft retail facility for Reveille Pet Care. Supervised and performed various historical renovations to Epworth-By-The-Sea in Santa Cruz.

## **Education**

AA Foothill College

Dennis Osmer, Program Director

### Experience

1997 – Present Community Action Board of Santa Cruz County, Inc. Santa Cruz, CA

*Program Director, Energy Services*

Implemented regionalization of program providing energy assistance and conservation to low income families. Developed quality customer service and accountability systems which have achieved or exceeded contract goals within budget. Program has grown from 3 employees to 25.

1993-1996 Paul Trucking Co. Watsonville, CA

*Safety Director/Risk Manager*

Developed and implemented a comprehensive safety, loss control and regulatory compliance program. This program, covering all aspects from insurance coverage procurement to claims management reduced insurance premiums by over \$350,000.00 per year and the Experience Modification from 86% to 66% in a company with over 100 employees. Some duties related to farming operation of Tut Bros. Farm in Caruthers, CA.

1995-1996 Tut Bros. Impex Watsonville, CA

*Manager*

Established and managed export business for trade with India as a subsidiary of Paul Trucking. Responsible for all aspects of international trade business. Delivered over \$1.5 million dollars in scrap metal and almonds

1990-1993 Northern Energy Watsonville, CA

*Assistant Manager*

Oversaw all aspects of propane business except hiring. Responsible for first satisfactory terminal rating from the California Highway Patrol in

previous two years. Computerized delivery system based on daily temperatures.

1986-1989 Premium Beverage Company Gilroy, CA

*Fleet Maintenance Supervisor*

Supervised maintenance and repair of 53-vehicle fleet. Also developed and implemented company personnel policies. Computerized shop work scheduling and record keeping.

1979-1986 Truck Maintenance, Inc. Watsonville, CA

*Self-Employed*

On location maintenance and repair for medium duty truck fleets. Specialized in propane carburetion and regulatory compliance. Completed over 20 satisfactory rated CHP terminal inspections.

#### Contract Consultant

Buena Vista Country Club, Aptos, CA 1994

The Furman Group, Las Vegas, NV 1996

Basra Transport Service, Watsonville, CA 1996

Grunsky, Farrar Ebey and Howell Law Firm 1999

California Senate Office of Research 2001

PT Logistics, Watsonville, CA 2002

#### Related Skills

Conversant and literate in Spanish.

Computer proficient in Windows 2000/XP/NT, MS Office 2000, Access Programmer

#### Education

1974 Watsonville High Watsonville, CA

*Graduated.*

1975 University of California Santa Cruz, CA

*Completed one year's study.*

#### Additional Experience

Santa Cruz County Planning Commissioner 2000 –

Regional Analysis and Planning Services Board Member 1999-

Bay Federal Credit Union Associate Board Member 2002-

Bay Federal Credit Union Supervisory Committee Member 1999- 2002

Santa Cruz County Energy Commissioner 1999- 2003  
 Pacific Bays Youth Corps Foundation Board Member 1999- 2000  
 City of Watsonville Mayor 1997-1998  
 City of Watsonville Council Member District 5 1994-1998  
 State LIHEAP Automation Collaborative Team Member 1998-2000 (Computerization project for energy service providers in California)  
 Association of Monterey Bay Area Governments 1<sup>st</sup> Vice President 1997-1998  
 Santa Cruz County Integrated Waste Management Board Member 1994-1998  
 Pajaro Valley Prevention and Student Assistance Board Member 1996-1998  
 Santa Cruz County Regional Transportation Commission Policy Committee 1995-1998  
 Watsonville Recycling Committee Chairman 1990-1991  
 Penny Club President 1991-1992  
 City of Watsonville Council Member 1987- 1989  
 Watsonville YMCA Board of Directors 1986-1988  
 Santa Cruz County Drug Abuse Commission Member 1984-1986

**Additional Education**

1994	University of California, Riverside Accident and Collision Investigation Course
1994	California Trucking Association Safety Coordinator Course
1991	Cabrillo College, Aptos, DBase Programming Course
1996	Ammonia Safety and Training Institute, Watsonville, CA 40 Hour Course

**Robert G. Lowenberg Grants & Contracts Manager**

- SUMMARY:**
- Twenty years of progressive contract, budget, and program management experience
  - Five years professional experience in home weatherization, repair and maintenance
  - Four years doing para-professional counseling, crisis-intervention, and social work
  - Proficient with MS Excel/Word, W2000, Caere Omniform, and the Internet

**EDUCATION:** **Shimer College, Mt. Carroll, Illinois (now in Waukegan, Illinois)**  
 Bachelor of Arts - Humanities, 1969

**Baltimore Polytechnic Institute, Baltimore, Maryland**  
Accelerated College Prep, September 1962 – June 1965

**EXPERIENCE: Community Action Board of Santa Cruz County, Inc./Energy Services**  
**Santa Cruz, Ca 95062 (August 1980 - present)**

**Grants and Contracts Manager, 1997 to present**

- Management, reporting, research, analysis, etc. for multiple government and private contracts
- Budget development and management (avg. \$2M/year)
- Comptroller
- Management of General Building Contractors License

**Program Director, 1987 - 1997**

- Coordination, management, and oversight of Energy Services program
- Contract and budget management
- Staff supervision
- Liaison with fund sources and contractors network

**Program Coordinator, 1983 –1986**

- Coordination and implementation of home weatherization program
- Organizational systems development
- Staff supervision
- Reporting for multiple government contracts (monthly, annual, close-

out)

**Crew Leader, 1980 - 1982**

- Installation of weatherization measures at customers' homes
- Maintenance of tools, vehicles, and equipment
- Supervision of Technicians
- Completion of requisite paperwork

***Nancy Estrella, Assistant Program Director***

***Qualifications Profile***

*An experienced and accomplished manager with proven ability to lead and direct a team in a fast paced and quality service environment.*

***Professional Experience***

**Assistant Program Director**  
*Energy Services, Watsonville, CA*

07/00-Present

Serve primarily as the operations manager assuring the quality delivery of service to customers and the achievement of contractual goals.

- Develop, implement and manage the systems, processes and procedures for the delivery of service to customers under current government and private industry contracts
- Manage schedules, deadlines, staffing and resource requirements
- Assist in contract management, budgeting and cost allocation processes
- Provide supervision, direction and support to the management team and subordinate staff
- Purchasing and inventory control
- Preparation of program and fiscal reports

**Key achievements:**

- Planned, directed and supervised the start up of a new office during an expansion of the organization
- Assisted in the planning and implementation of automated systems to accommodate new services under existing contracts, which resulted in successful performance and spend-out of appropriated funds
- Provided support and direction to a contracted database developer to develop the agency's existing database in key areas of customer and job tracking
- Developed a comprehensive training program for employees resulting in a reduction of training time and employee turnover

**Customer Service Manager**

11/98-07/00

*Energy Services, Watsonville, CA*

Responsible for the management and administration of all office operations.

- Schedule and delegate work assignments
- Recruit, hire, train, supervise and evaluate customer service and office personnel
- Coordinate, implement and manage special service projects
- Coordinate with outside agencies, organizations and media to promote services
- Develop and maintain the agency's written procedures manual

**Key achievements:**

- Directed and developed staff while fostering a cooperative and team driven environment
- Developed and implemented an automated system for the scheduling of in home customer appointments, which increased efficiency in scheduling and job tracking.

**Senior Account Clerk**

12/96-11/98

*County of Santa Cruz General Services Department, Santa Cruz, CA*

Provide complex administrative support to internal and external customers.

- Manage automated work-order system for the maintenance division.
- Prepare payroll data and all personnel related paperwork for 50+ employees
- Manage inter-departmental A/R accounts
- Assist in the preparation of data compilation for budgetary and cost allocation processes
- Supervise quarterly inventory counts and maintain automated inventory system

**Key achievements:**

- Installed, implemented and managed an automated work order/job costing software program for the maintenance department, which increased efficiency in job dispatching and provided a higher level of accuracy for fiscal reporting
- Transitioned A/R accounts from a manual journal to Excel spreadsheets

**Senior Account Clerk**

07/96-12/96

*County of Santa Cruz Human Resources Agency, Santa Cruz, California*

Primarily responsible for contract reporting.

- Prepare statistical reports for Federal and State government contracts under the County's welfare and food stamp programs
- Manage food stamp inventory account

**Key achievements:**

- Developed report forms in Excel spreadsheets for complex statistical reporting, which reduced report preparation time by 50%.

**General Manager**

10/93-05/96

*Scotts Valley Fitness Club, Scotts Valley, California*

Responsible for the daily operations of the business.

- Manage automated membership & electronic billing program
- Development, implementation, and management of the daily accounting system
- Maintain A/R and A/P accounts
- Schedule and supervise 6 – 10 employees
- Maintain vendor contacts, purchase retail product and maintain inventory system

**Key achievements:**

- Purchased, installed, implemented and managed an automated membership & electronic billing program, which increased efficiency in the tracking of memberships and the management of cash flow

**Office Manager**

01/90-10/93

*Santa Cruz Health Club, Santa Cruz, California*

Responsible for the accurate processing and tracking of all bookkeeping related tasks.

- Maintain the daily accounting system, A/R and A/P accounts
- Reconcile monthly bank statements
- Prepare payroll
- Prepare quarterly tax returns
- Prepare and reconcile month end financial data for the CPA

**Education**

San Jose State University, San Jose, California

Bachelor of Science Degree in Business Administration

Major in Management; Minor in Economics (1987)

Overall GPA 3.2/4.0

Cabrillo College, Aptos, California

Associate in Science Degree (1984)

Overall GPA 3.6/4.0

### ***Specialized Training & Seminars***

- Living Leadership Seminar, November 2002
- Managing Multiple Projects, Objectives, and Deadlines, April 2001
- Managing Unacceptable Employee Behavior, July 2000
- Conflict Resolution, March 1999
- Providing Excellent Customer Service, July 1998
- Salary and Benefits Budget Preparation, March 1998

### **AMBAG SUBCONTRACTOR**

Nicolas Papadakis

2002

Nicolas Papadakis is currently the Executive Director of the Association of Monterey Bay Area Governments (AMBAG), a regional comprehensive planning organization on the Central California Coast.

Prior to being appointed as Executive Director in 1985, he held the position of Deputy Executive Director, Program Manager for Transportation and Air Quality Planning and Transportation Planner.

During his tenure with the Association of Monterey Bay Area Governments, Mr. Papadakis has directed or participated in the development of regional plans and policies related to: transportation, public transit, air quality, housing, water quality, marine and coastal issues and demographic studies. He has participated in numerous local technical and policy advisory committees. He is also an active member of various statewide and national organizations and has served on the Board of Directors of the National Association of Regional Councils and was the chair of the Association's Executive Directors Committee.

His community involvement activities have included, among others: a past member of the Monterey County Task Force on tourism, a member and past chair of the Monterey County Water Awareness Committee, Inc., a member and past secretary of the Economic Development Corporation of Monterey County, Inc., a member of the Board of Directors of the Arts Habitat, Inc., member and past president of the Seaside Lions Club, and various governmental affairs and economic development committees of local Chambers of Commerce.

A native of Athens, Greece, Mr. Papadakis attended Long Beach State University where he obtained a B.A. in Mathematics and did graduate work in Public Policy and Administration.

Kyrrha Sevco

Kyrrha Sevco is the Transportation Demand Management (TDM) Supervisor for Commute Alternatives, the rideshare program for Monterey County that is located at the Association of Monterey Bay Area Governments (AMBAG).

Before coming to AMBAG in 1998, Ms. Sevco was the Project Manager for Brooks/Cole Publishing where she managed the production for print and electronic advertising material, the print buying of 4-color projects, permissions, and the art needs for the Marketing Communications Department. She has over ten years of management experience including formulating and articulating goals, objectives, and strategies; program research; maintaining schedules and budgets; and evaluating and supervising staff and their work products.

During her tenure with the Association of Monterey Bay Area Governments, Ms. Sevco has managed a variety of projects that are regional in scale and require maintaining effective working relationships with numerous agencies, local governments, nonprofits, schools, and individuals. She has managed a yearly program budget of \$350,000, marketed sustainable commute programs to regional audiences through promotional events such as Rideshare Week, Bike Week, and Clean Air Month; developed, implemented, and managed the following programs: the Electric Bicycle, Salinas Commuter Club, SchoolPool and Vanpool; created and managed a trip assistance program for CalWORKSs clients; and supervises TDM coordinators and directs their work products as well as manages and directs the work products of consultants.

Other current activities include her involvement with the planning of the Monterey Bay Sanctuary Scenic Trail. The 60-mile trail is a proposed multi-use recreation and interpretive pathway that will link existing and newly established trail segments into a continuous coastal trail around the Monterey Bay. The trail will be located and designed so visitors can explore and enjoy the coastal communities of Santa Cruz and Monterey Counties, while respecting residential, agricultural and environmentally sensitive surroundings along the way. The path is the first and largest regional trail project in the tri-county area.

Her community involvement activities include: past class member and present board member of Leadership Monterey Peninsula; a current class member of Leadership Santa Cruz County; and a current board member of the Association for Commuter Transportation.

Ms. Sevco holds a Bachelor of Science degree (Cum Laude) in Business Administration from San Jose State University where she also received the Dean's Scholar Award.

## **VIII. BUDGET**

### **Activity - Direct Labor**

Benefits - Direct Implementation Labor	\$44,427.60
Labor - Customer Education and Training	\$21,857.42
Payroll Tax - Direct Implementation Labor	\$106,943.35

<b>Total</b>	<b>\$173,228.37</b>
<b>Direct Implementation Hardware and Materials</b>	
Direct Implementation Literature	\$4,800.00
Education Materials	\$4,800.00
Energy Measurement Tools	\$4,800.00
Installation Hardware	\$327,168.00
<b>Total</b>	<b>\$341,568.00</b>
<b>EM&amp;V Labor and Materials</b>	
Labor - EM&V	\$10,537.41
Subcontractor Labor - EM&V	\$24,000.00
<b>Total</b>	<b>\$34,537.41</b>
<b>EM&amp;V Overhead</b>	
Benefits - EM&V Labor	\$367.92
Payroll Tax - EM&V Labor	\$1,136.21
Pension - EM&V Labor	\$192.57
<b>Total</b>	<b>\$1,696.71</b>
<b>Human Resource Support and Development</b>	
Labor - Human Resources	\$22,193.38
Labor - Staff Development and Training	\$17,393.38
<b>Total</b>	<b>\$39,586.75</b>
<b>Installation and Service - Labor</b>	
Labor - Measure Installation	\$415,290.91
<b>Total</b>	<b>\$415,290.91</b>
<b>Managerial and Clerical Labor</b>	
Labor - Clerical	\$28,291.94
Labor - Program Design	\$9,093.59
Labor - Program Development	\$9,093.59
Labor - Program Planning	\$9,093.59
Labor - Program/Project Management	\$17,006.25
Labor - Staff Management	\$28,031.51
Labor - Staff Supervision	\$17,006.25
<b>Total</b>	<b>\$117,616.72</b>
<b>Marketing/Advertising/Outreach Costs</b>	
Benefits - Marketing/Advertising/Outreach Labor	\$11,422.50
Brochures	\$15,405.60
Labor - Business Outreach	\$31,434.00
Labor - Customer Outreach	\$48,589.68
Labor - Customer Relations	\$63,337.94
Labor - Marketing	\$31,434.00
Payroll Tax - Marketing/Advertising/Outreach Labor	\$21,068.11
Pension - Marketing/Advertising/Outreach Labor	\$1,886.04
Subcontractor - Brochures	\$20,000.00
Subcontractor Labor - Marketing	\$80,000.00
<b>Total</b>	<b>\$324,577.87</b>
<b>Overhead (General and Administrative) - Labor and</b>	
Benefits - Administrative Labor	\$20,730.00

Equipment - Computing	\$8,500.00
Facilities - Lease/Rent Payment	\$39,034.80
Labor - Accounts Payable	\$2,613.15
Labor - Accounts Receivable	\$2,613.15
Labor - Administrative	\$9,093.59
Labor - Automated Systems	\$11,668.80
Labor - Contract Reporting	\$20,905.16
Labor - Information Technology	\$11,668.80
Labor - Materials Management	\$14,015.75
Labor - Procurement	\$85,467.35
Labor - Transportation Services	\$12,000.00
Office Supplies	\$12,000.00
Payroll Tax - Administrative Labor	\$27,119.52
Pension - Administrative Labor	\$5,621.04
Postage	\$9,600.00
<b>Total</b>	<b>\$292,651.11</b>
<b>Grand Total</b>	<b>\$1,740,753.84</b>