

SoCaIREN 2024-2031 Business Plan Public Webinar

March 9, 2022



Agenda

1) SoCalREN Portfolio Summary

- Core Values and Segmentation
- Budget Distribution by Segment and Sector
- Zero-Based Budgets and Total System Benefits

2) Sector and Program Summaries

- Public
- Commercial
- Residential
- Agriculture
- Cross-Cutting: Codes and Standards
- Cross-Cutting: Workforce Education and Training
- Cross-Cutting: Finance

Southern California REGIONAL ENERGY NETWORK



The Southern California Regional Energy Network (SoCalREN) was created to harness the collective power of residents, businesses, agricultural customers, and the public agencies to achieve an unprecedented level of energy savings across Southern California.



Public Agencies



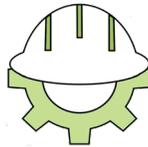
Residential



Agriculture



Commercial



**Workforce Education
and Training**



Finance



Codes & Standards



The SoCalREN Public Agency Programs are administered by the County of Los Angeles and funded by California utility ratepayers under the auspices of the California Public Utilities Commission. Learn more at socialren.org.

[Link to Business Plan](#)

SoCalREN Territory



Table 1. Percentage of Population Within a DAC, Rural, or Very Low-Income Community by County

County	Eligible Population ¹	DAC Population ²	Rural Population ³	Very Low-Income Population ⁴
Imperial	164,648	76%	57%	46%
Inyo	14,574	0%	100%	0%
Kern	836,404	72%	32%	38%
Kings	141,645	100%	100%	0%
Los Angeles	9,964,639	65%	7%	31%
Mono	8,127	0%	100%	0%
Orange	3,103,190	45%	0%	23%
Riverside	2,307,548	53%	11%	28%
San Bernardino	1,996,622	73%	14%	27%
San Luis Obispo	236,542	0%	51%	27%
Santa Barbara	440,584	0%	22%	26%
Tulare	392,745	78%	67%	24%
Ventura	843,645	21%	18%	34%
Total	20,450,913	58%	12%	29%

1. From 2017 Census Estimate

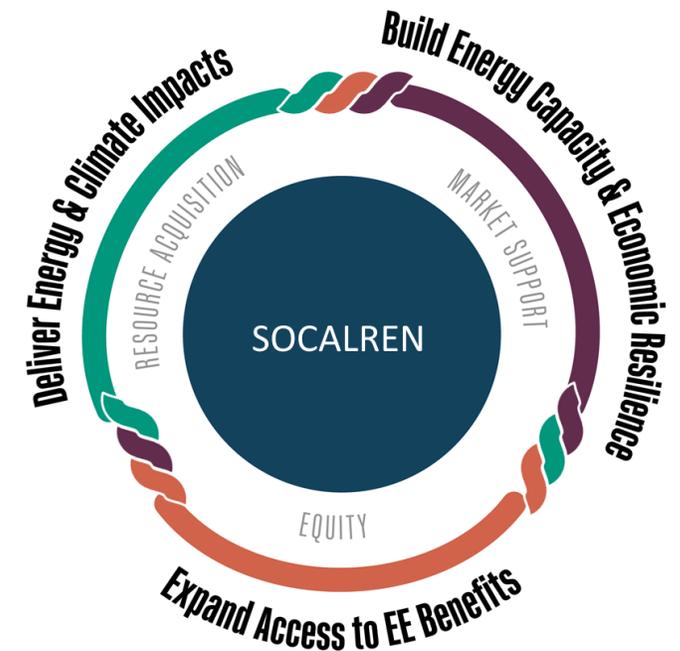
2. Within 25% most disadvantaged according to CalEnviroScreen 3.0

3. Rural-Urban Commuting Area (RUCA) codes #2-#10

4. As classified by the CA Department of Housing and Community Development

Overall SoCalREN Summary

- SoCalREN is designed to fill gaps, serve HTR markets, and offer interventions that other PAs will not provide.
- SoCalREN's Mission: Ensuring equitable access to technical and financial support to lead public agencies and their communities towards a clean, reliable, and affordable energy future
- SoCalREN Achievements to date:
 - Over 121 GWh savings
 - Over 7 MW savings
 - Over 1.4 million Therm Savings
 - Over 450 contractors trained through WE&T
 - Over 600 students enrolled in WE&T programs



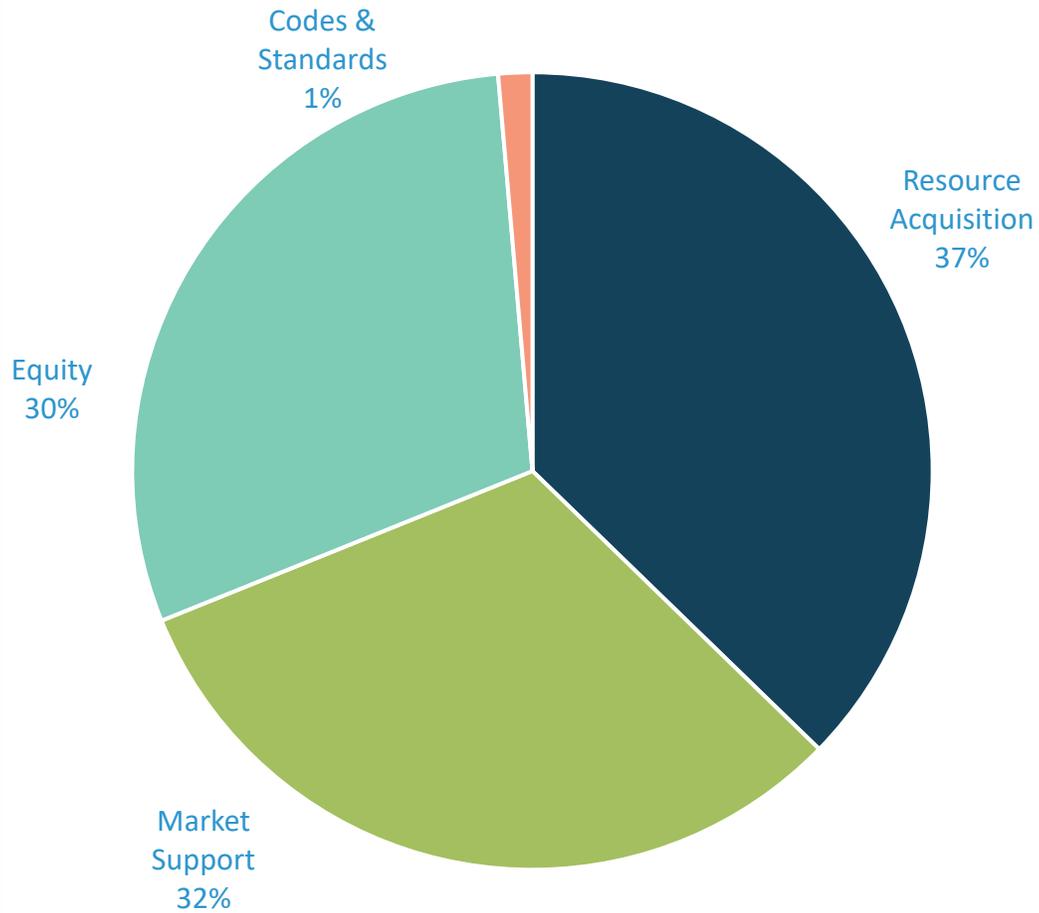
SoCalREN Core Values Align with CPUC Segments

Core Values/Goals	Portfolio Objectives and Outcomes	Segment
DELIVER ENERGY AND CLIMATE IMPACTS	Supporting activities with trackable energy savings and GHG reductions within the SoCalREN service area that contribute to local and state climate or sustainability goals. Increased energy & GHG reductions	RESOURCE ACQUISITION
EXPAND ACCESS TO EE BENEFITS	Expanding access to energy resources to enhance carbon reduction opportunities and other environmental outcomes for hard-to-reach markets including disadvantaged communities, rural areas, and underserved communities. Underserved communities gain increased access to EE benefits.	EQUITY
BUILD ENERGY CAPACITY & ECONOMIC RESILIENCE	Building long-term knowledge and skills for public agencies, contractors, and transition age youth through WE&T that leads to energy competency, policies or other infrastructure & helping local communities build long-lasting, strong, and self-sufficient economies.	MARKET SUPPORT
DRIVING ADVANCED CODES AND STANDARDS		

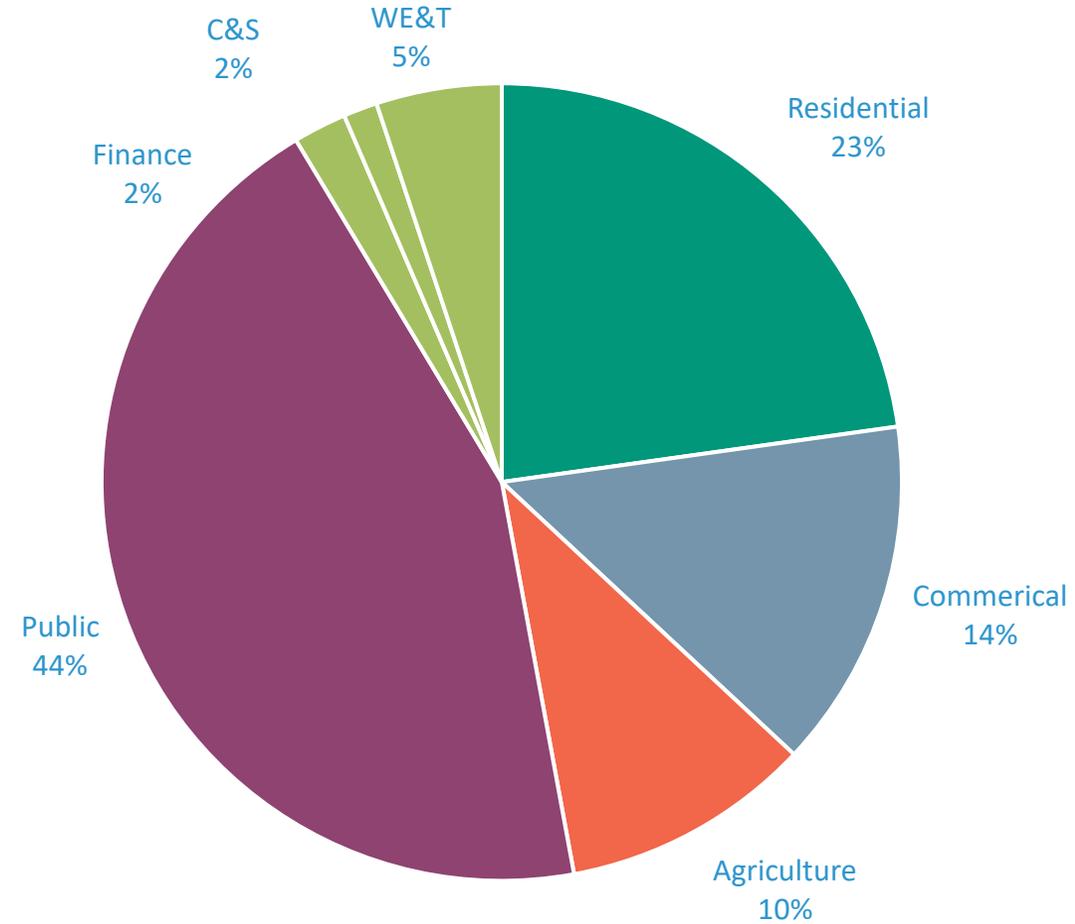


Budget Distribution by Segment and Sector

SoCalREN 2024-2027 Budget Percentage by Segment



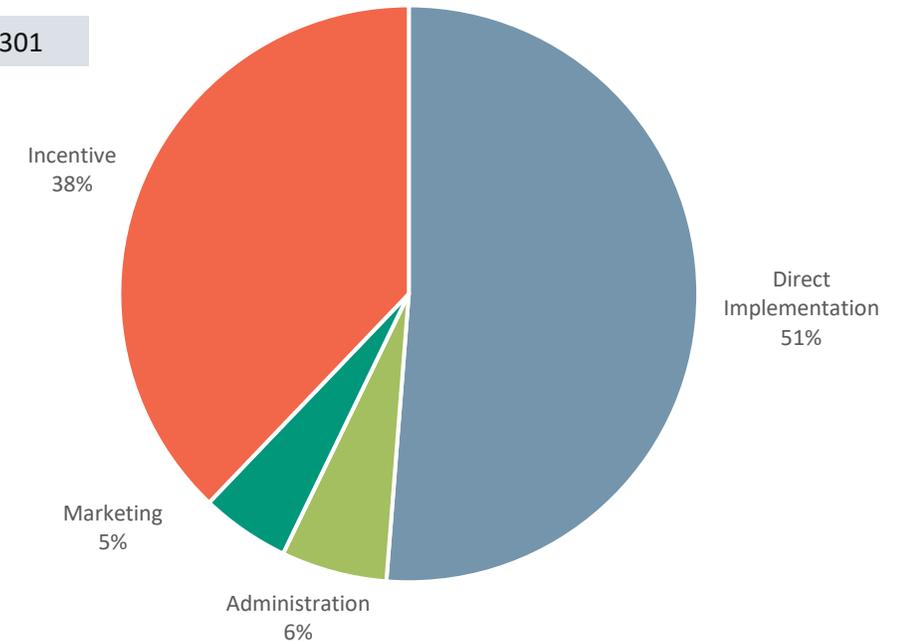
SoCalREN 2024-2027 Budget Percentage by Sector



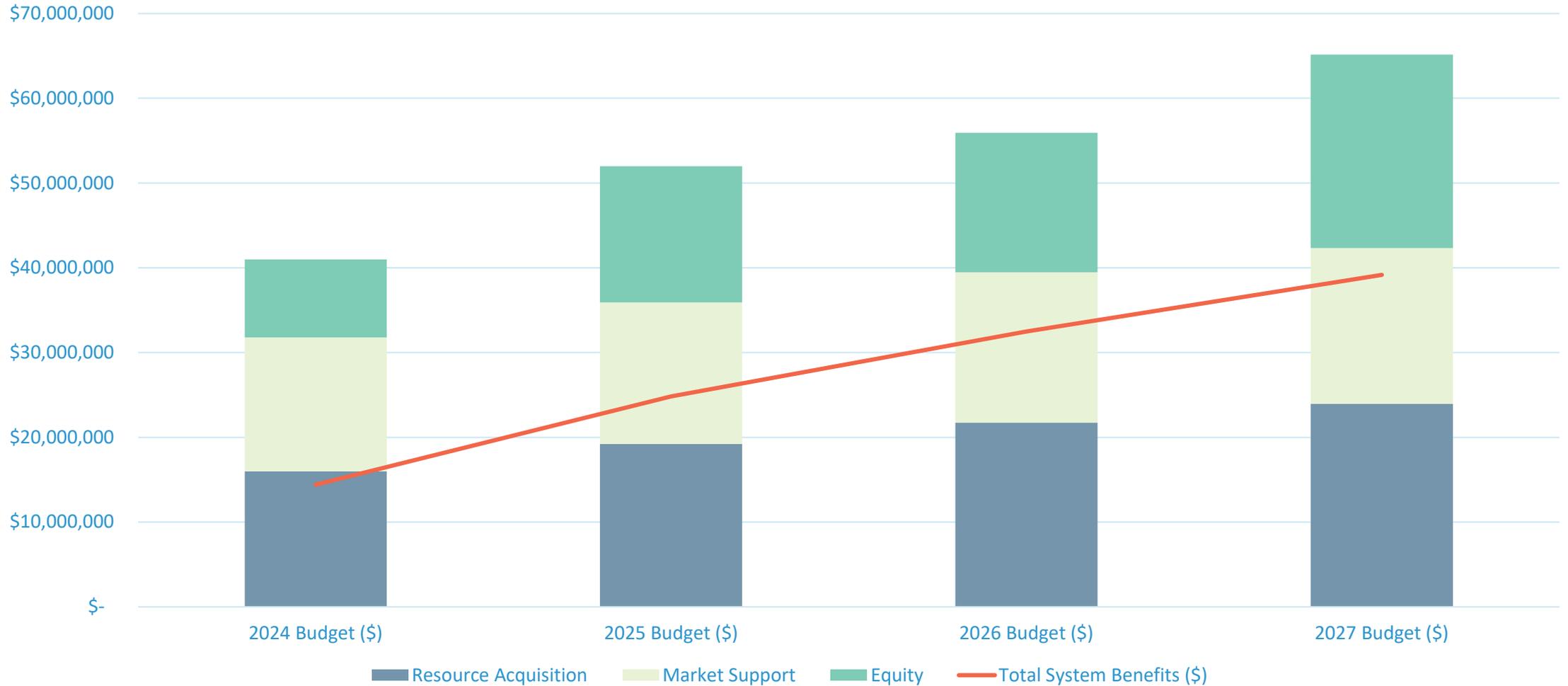
Zero-Based Budgets

Sector	Admin	Marketing	DINI	Incentives	2024-2027 Budget	2024-2027 TSB
Ag	\$2,200,700	\$1,320,420	\$6,202,817	\$12,283,068	\$22,007,004	\$29,102,094
Comm.	\$2,402,458	\$1,594,344	\$10,530,490	\$16,268,107	\$30,795,399	\$1,841,941
C&S	\$298,000	\$178,800	\$2,503,200	N/A	\$2,980,000	N/A
Finance	\$375,700	\$280,560	\$4,019,740	N/A	\$4,676,000	N/A
Public	\$6,219,732	\$5,704,995	\$65,524,311	\$18,684,205	\$96,133,243	\$36,608,948
Res	\$816,285	\$1,024,405	\$12,526,917	\$35,062,218	\$49,429,826	\$41,140,317
WE&T	\$660,000	\$660,000	\$9,680,000	N/A	\$11,000,000	N/A
Total	\$12,972,875	\$10,763,524	\$110,987,475	\$82,297,598	\$217,021,477	\$108,693,301

- Budgets were built at the program-level and rolled up into sectors and the portfolio
- Gaps in IOU Resource Acquisition programs for customer sub-sectors led to a large increase in incentive budget for the portfolio

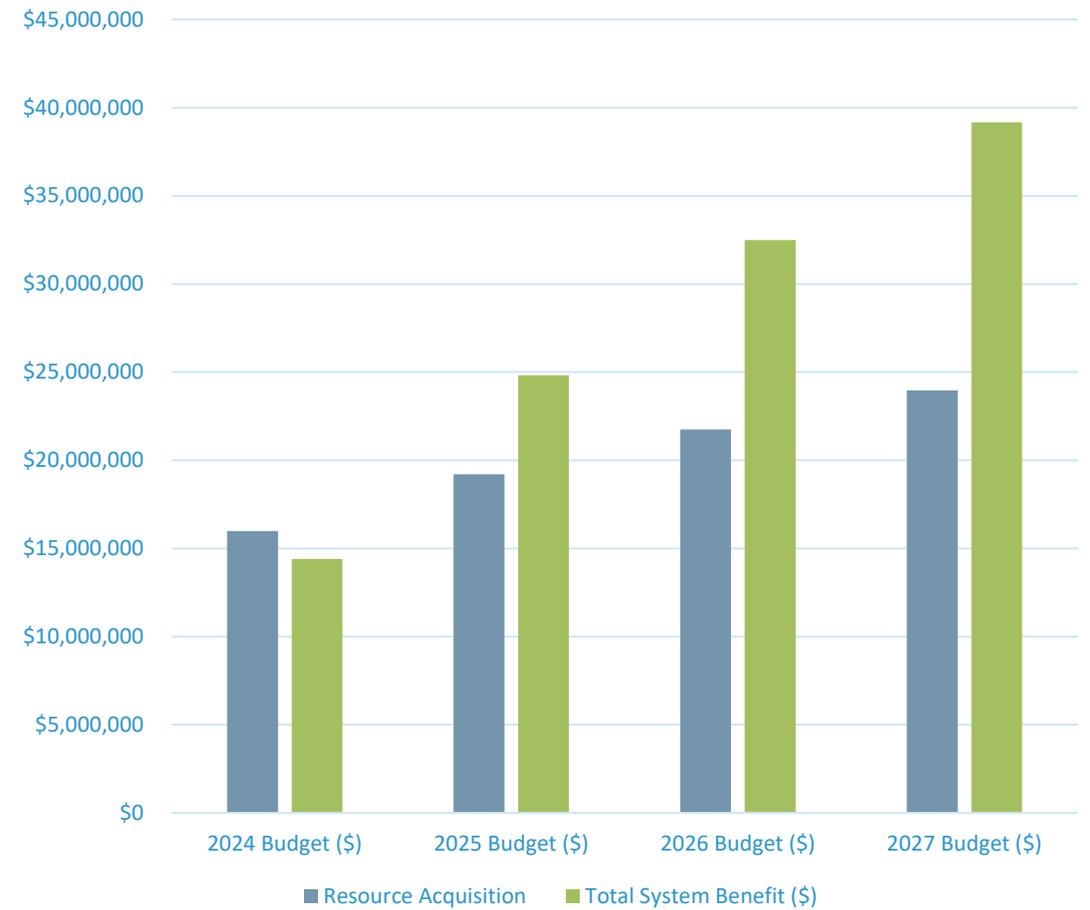


Budget Segmentation and Total System Benefits



Forecasted Budgets and Total System Benefits

Segment	2024	2025	2026	2027	Total
Resource Acquisition	\$15,990,543	\$19,220,203	\$21,741,532	\$23,963,239	\$80,915,517
Market Support	\$17,318,094	\$18,294,525	\$19,423,646	\$20,108,113	\$75,144,378
Equity	\$7,682,699	\$14,457,290	\$14,764,254	\$21,077,339	\$57,981,582
Codes and Standards	\$650,000	\$720,000	\$810,000	\$800,000	\$2,980,000
Sector	2024	2025	2026	2027	Total
Agricultural	\$2,679,779	\$5,293,889	\$6,551,046	\$7,482,292	\$22,007,006
C&S	\$650,000	\$720,000	\$810,000	\$800,000	\$2,980,000
Commercial	\$5,395,854	\$8,303,254	\$6,481,349	\$10,614,944	\$30,795,401
Finance	\$1,000,000	\$1,160,000	\$1,216,000	\$1,300,000	\$4,676,000
Public	\$18,367,384	\$22,579,162	\$25,995,268	\$29,191,429	\$96,133,243
Residential	\$10,958,319	\$11,925,713	\$12,865,769	\$13,680,026	\$49,429,827
WE&T	\$2,590,000	\$2,710,000	\$2,820,000	\$2,880,000	\$11,000,000



Program Year	2024	2025	2026	2027	2024-2027 Total
TSB (\$)	\$14,397,271	\$24,835,485	\$30,288,042	\$39,172,503	\$108,693,301

Sector and Program Summaries



SoCalREN Sector Summary

Sector	New or Existing Sector	2024-2027 Budget	2024-2027 TSB (\$)	# of programs	# of Resource Acquisition	# of Equity	# of Market Support
Public	Existing	\$96.m	\$36.6m	10	3	3	4
Residential	Existing	\$49.4m	\$41.1m	3	3	0	0
Agriculture	New	\$22.0m	\$29.1m	3	1	1	1
Commercial	New	\$30.8m	\$1.8m	4	0	2	2
CC: WE&T	Existing	\$11.0m	N/A	5	0	3	2
CC: Finance	Existing	\$4.7m	N/A	2	0	1	1
CC: Codes & Standards	New	\$2.9m	N/A	1	0	0	1*
Total	N/A	\$217.0m	\$108.7m	28	7	10	11

Public Sector



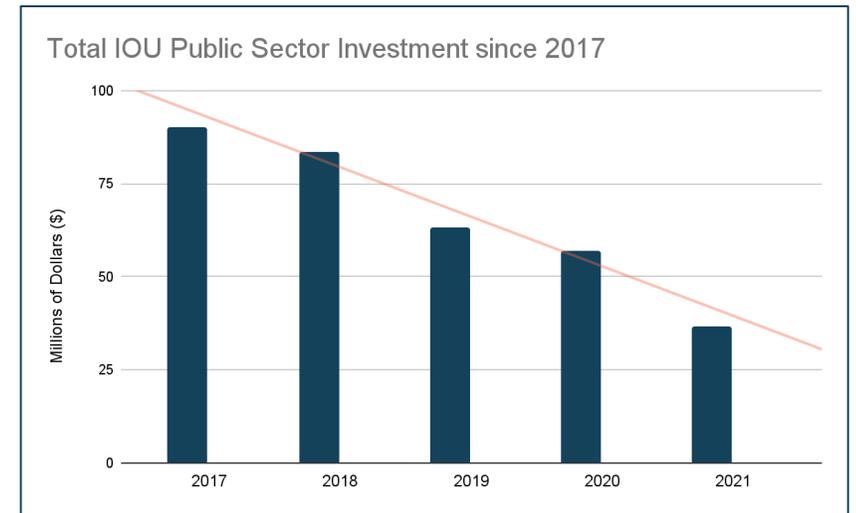
Public Sector Summary

Why is SoCalREN offering this sector?

- Public agencies face unique challenges and barriers to action, exacerbated by the disruption caused by COVID-19
- Investment in public sector has decreased significantly since 2017
- Public sector customers' infrastructure serves the public good and is visible in the community. As a result, public agencies can "lead by example" and set the foundation of community resilience

What are the gaps that SoCalREN will be filling?

- Gap in public sector programs due to IOU program closures and transitions
- Budget and staff resource constraints
- Limited EE resources for hard-to-reach (HTR) and disadvantaged communities (DAC)
- Limited services to overcome procurement challenges
- Lack of trusted energy expertise and resources
- Support for stranded savings opportunities

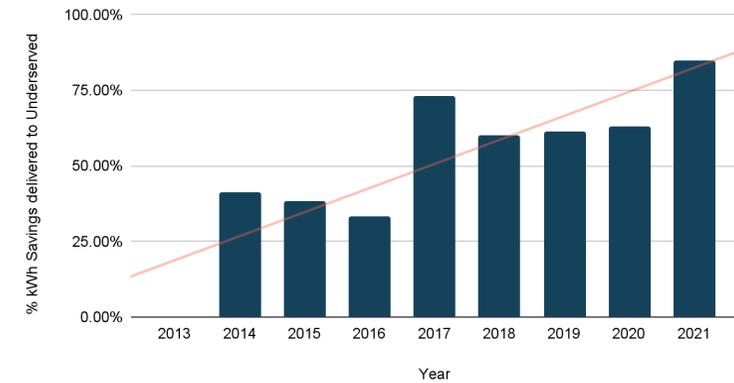


*Source: CEDARs SCE/SCG Budget Filing

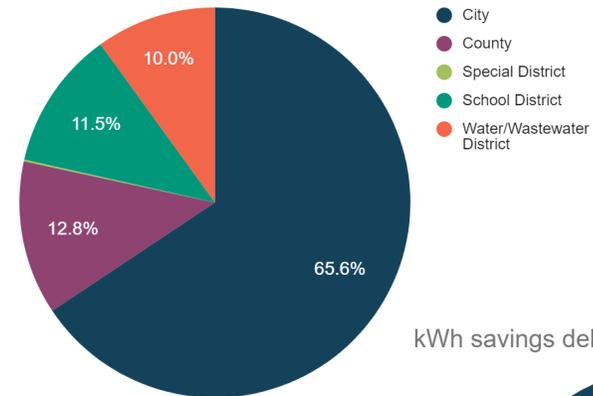
Public Sector Summary

- **Previous Sector Accomplishments**
 - 95 GWh, 3.8MW, & 334K therms in annual savings delivered since 2013
 - 60% kWh savings delivered to underserved communities
 - 21,156 tons greenhouse gases (GHGs) emissions reduced
 - 641 projects completed, 49% of projects completed at underserved facilities
 - Over 200 public agencies enrolled
 - 57 million sq feet of building space benchmarked across 275 facilities
 - 120 comparative energy analyses produced
 - 5 regional partners under contract to support expanded reach of SoCalREN

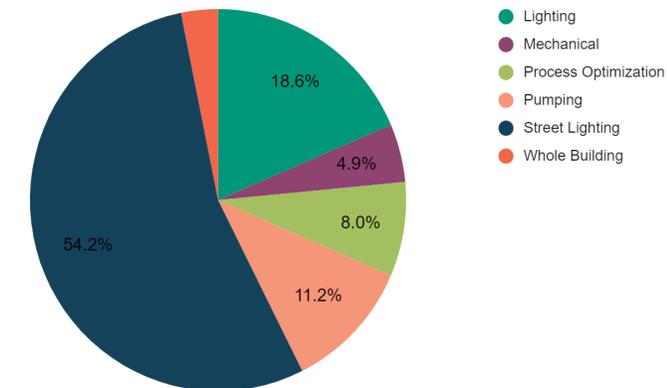
% kWh Savings delivered to underserved communities



Diversity of agencies served



kWh savings delivered to diverse project types



Public Sector Program List

Program Name	New or Existing Program	Segment
EE Project Delivery Program	Existing	Market Support
Disadvantaged Communities Distributed Energy Resource Program	Existing	Equity
Metered Savings Program	Existing	Resource Acquisition
Streamlined Savings Pathway	Existing	Resource Acquisition
Rural-HTR Public Agency Direct Install	New	Equity
Energy Resiliency Action Plan	New	Market Support
Regional Partner Initiatives	New	Market Support
Water and Wastewater Strategic Energy Management	New	Market Support
Underserved Schools Strategic Energy Management	New	Equity
Water Infrastructure Program	New	Resource Acquisition

EE Project Delivery Program

- **Program Description:** At no cost to agencies, SoCalREN's PDP program provides objective, third-party expertise customized to meet the unique needs of each enrolled agency and help them achieve their climate and energy goals.
- **Market Barriers:**

Market Barriers Addressed							
Limited Staff Bandwidth	Lack of technical expertise	Funding and financing constraints	Confusing and disjointed program offerings	Procurement challenges	Limited access to actionable data for informed decision making	Risk aversion	Limited resources and knowledge of distributed energy resource opportunities

- **Program Interventions:**

Dedicated project management and technical support throughout a project lifecycle.



Engagement
& Enrollment



Portfolio
Energy
Analysis



Project
Identification
& Audit



Design &
Procurement



Construction



Hand-off

Disadvantaged Communities Distributed Energy Resource (DER DAC) Program

- **Program Description:** DER DAC works directly with underserved public agency staff throughout the project lifecycle to implement energy efficiency strategies. DER DAC also identifies distributed energy resources (DER) and sustainability strategies during EE project identification and provides information for integrating DERs in energy efficiency projects.
- **Market Barriers Addressed:**

Underserved Public Agency Market Barriers								
Limited Staff Bandwidth	Lack of technical expertise	Funding and financing constraints	Confusing and disjointed program offerings	Procurement challenges	Limited access to actionable data for informed decision making	Risk aversion	Limited resources and knowledge of DER opportunities	Lack of comprehensive IDSM program offerings that offer DER support

- **Program Interventions:**
 - Comprehensive and customized EE project management and technical engineering services for underserved communities
 - High-level review of DER options

Metered Savings Program Summary

- **Program Description:** Leverages a normalized metered energy consumption (NMEC) approach to maintain long-term and persistent energy savings.
- **Market Barriers Addressed:**
 - Limited program offerings for savings below code
 - Lengthy project review and processing times
 - Lack of resources and technical expertise in public sector to pursue EE programs
- **Program Interventions:**
 - Downstream market channel with incentives based on lifecycle avoided GHG emissions
 - Provides higher incentive rates to underserved communities
 - Ongoing project energy saving reports
- **Program Accomplishments since 2019:**
 - 2.0 GWh and 413 kW energy savings

Streamlined Savings Pathway Summary

- **Program Description:** Expedited program pathway offering deemed and custom incentives based on lifecycle avoided GHG emissions
- **Market Barriers Addressed:**
 - Limited program offerings with a focus on underserved public agencies,
 - Lengthy project review and processing times,
 - Lack of resources and technical expertise in public sector to pursue EE programs
- **Program Interventions:**
 - Downstream market channel with incentives based on lifecycle avoided GHG emissions
 - Provides higher incentive rates to underserved communities
- **Program Accomplishments to date:**
 - Planned launch in Q1 2022.
 - Viable program pathway to capture verifiable electric savings no longer eligible for support nor incentives due to SCE's program closures

Rural-HTR Small Public Agency Direct Install Summary

- **Program Description:** Program provides no cost energy efficiency retrofits at underserved public agency facilities with < 20 kW of peak demand usage.
- **Market Barriers Addressed:**
 - Limited staff bandwidth and resources to devote to energy efficiency
 - Lack of technical expertise
 - Funding and financing constraints
 - Procurement challenges
 - Risk aversion
 - Limited resources and knowledge of distributed energy resource (DER) opportunities
- **Program Interventions:**
 - Provides streamlined, no-cost implementation of energy efficiency measures.
 - Provides public agency technical expertise and knowledge through project managers and vetted contractors

Energy Resiliency Action Plan Summary

- **Program Description:** Develop EE and DER deployment roadmaps to strengthen the resilience of critical community infrastructure. Program will support agencies with regional planning and prioritization of project implementation.
- **Market Barriers Addressed:**
 - Public agencies lack the resources and expertise to create implementation-ready plans to support their communities during state of emergency situations.
 - ERAP removes the burden for participating agencies of creating their own tools and plans.
- **Program Interventions:**
 - Integrate energy implementation strategies into resiliency action planning to help public agencies increase community resilience.
 - Provide a regional mapping tool that prioritize projects based on economic feasibility, climate-related threats, and socioeconomic factors.

Regional Partner Initiatives Summary

- **Program Description:** The program leverages regional partners to test new and innovative intervention strategies that can then be scaled as appropriate to other regions.
- **Market Barriers Addressed:**
 - Overcome lack of program customization, better fulfill regional needs, and address specific public agency gaps.
- **Program Interventions:**
 - Hold regular discussions with regional partners to develop ideas
 - Allow regional partners to submit ideas and proposals to the program
 - Prepare application submissions for evaluation and discussions of feasibility
 - Hold debriefs with regional partners to review ideas and next steps

Water and Wastewater Strategic Energy Management Summary

- **Program Description:** Helps municipally-owned potable water systems and wastewater treatment plants expedite comprehensive peak demand reduction projects. The SEM approach creates a foundation for sustained energy savings by fostering staff's ability to integrate strategic energy decisions into their workflow.
- **Market Barriers Addressed:**
 - Limited program services for peak demand reduction strategies
 - Water/Wastewater customer's funding and financing constraints
 - Limited staff bandwidth
 - Risk-aversion among water operators
- **Program Interventions:**
 - Development of an SEM Roadmap to set energy and operational goals
 - Trainings to identify, prioritize, and implement energy savings actions
 - Technical Assistance and Incentive intervention strategies

Underserved Schools Strategic Energy Management Summary

- **Program Description:** Program will engage K-12 school districts and community colleges building occupants on systematic energy management best practices and will develop climate and energy leadership across staff, administrators, and educators.
- **Market Barriers Addressed:**
 - Schools often lack the knowledge and capacity to turn energy savings opportunities into action.
- **Program Interventions:**
 - Provide designated SCR Project Manager
 - Provide tools and guidance to support schools with their long-term strategic energy planning
 - Develop and help agencies integrate energy efficiency curriculum
 - Expand one-stop EE project delivery to include integrated demand side management (IDSM) audits and recommendations

Water Infrastructure Program Summary

- **Program Description:** The Water Infrastructure program is a downstream offering that supports long-term EE solutions to water production, distribution, and treatment systems. Measures include wastewater mixing, ultraviolet controls, pump sequencing, etc
- **Market Barriers Addressed:**
 - Water infrastructure staff usually cannot identify and implement EE projects
 - Utility programs have cost-effectiveness restrictions and can only offer simple solutions
 - Complex and time intensive EE water infrastructure projects will be stranded
- **Program Interventions:**

PY	SoCalREN Savings Claims
Year 1	No savings delivery – focus on project development
Year 2	Claim BRO and AOE measures
Year 3	Claim long-term custom measures
Year 4	Claim long-term custom measures

Commercial Sector





Commercial Summary

Why is SoCalREN offering this sector?

- ~44% of all commercial building energy usage in the United States can be attributed to small businesses.
- Small businesses have limited opportunities to participate in EE programs due to facility size and low energy consumption.
- This sector serves customers that are ineligible to participate or neglected in other EE programs based on its focus on small facilities.

What are the gaps that SoCalREN will be filling?

- The SMB segment is underserved by EE programs which have emphasized short term energy savings and high-cost effectiveness in the large commercial sub-segment
- SCE Commercial Custom and Deemed programs have closed, leaving commercial customers without viable pathways for EE program



Commercial Strategies and Outcomes

- SoCalREN Commercial Strategies:
 - 1) Participants receive information about energy savings opportunities and the benefits of energy efficiency
 - 2) Mitigate out-of-pocket cost barriers for small and medium hard-to-reach businesses by delivering seamless no-cost EE measures and strategies
 - 3) Encourage the adoption and proliferation of EE measures and practices in the commercial sector by recognizing local business leaders for excellence in facility energy management
- SoCalREN Commercial Outcomes:
 - 1) Participating businesses recognize the relationship between energy efficiency, business operations, and sustainable long-term growth
 - 2) Commercial sector participants achieve energy cost reductions ranging from 10-25% on their utility bills
 - 3) Businesses adopt more sustainable energy practices in their operations over the long term



Sector Program List

Program Name	New or Existing Program	Segment
Small Commercial Direct Install Program	New	Equity
California Green Business Network Program	New	Market Support
Food Desert Energy Equity Program	New	Equity
Small & Medium Business Energy Advisory	New	Market Support

Small Commercial Direct Install Program Summary

- **Program Description:** The program provides no-cost direct install retrofits at small commercial facilities.
- **Market Barriers Addressed:**
 - Limited energy efficiency program applicability for small facilities and small projects
 - Limited staff to implement energy efficiency and energy efficiency is deprioritized
 - Limited energy usage and energy efficiency awareness
 - Funding and financing constraints
- **Program Interventions:**
 - The DI program unlocks stranded energy savings for small, HTR commercial customers whose projects would otherwise be left behind in the transition to a clean, safe, secure, and affordable energy future.
 - The program is designed to help small commercial facilities overcome barriers to energy projects. It is designed to address market barriers by providing streamlined, no-cost implementation of energy efficiency measures.

California Green Business Network Program Summary

- **Program Description:** Promotes and expands the existing California Green Business Network (CAGBN) and offers services and incentives to achieve green business certification.
- **Market Barriers Addressed:**
 - Providing small businesses with individual attention to identify reductions and access to resources to make improvements.
- **Program Interventions:**
 - Audit to identify opportunities
 - Education for short-term and long-term savings
 - Incentives for energy efficiency equipment
 - Recognition to promote business within community

Food Desert Energy Efficiency Equity Program Summary

- **Program Description:** The Food Desert Energy Efficiency Equity (FDEEE) program is an initiative designed to support corner stores and small businesses within food deserts across the SoCalREN region. It provides healthier food options and funds new energy-efficient refrigerators. Through this initiative, store owners save on energy usage and utility bills while providing fresh and healthy food options for the communities they serve.
- **Market Barriers Addressed:**
 - High cost of time and effort to research, purchase and install EE equipment
 - High cost of time and effort to ensure proper recycling and management of inefficient equipment
 - Limited staff bandwidth and training
 - Limited funding available for EE upgrades
 - Limited understanding and/or access to EE programs due to lack of coordination between EE programs and fragmented messaging for customers
 - Challenging to engage under resourced small/medium businesses in sustainability improvements
 - Limited or no energy efficient refrigerator space dedicated to healthy food options in markets within food deserts
 - History of marginalization, environmental racism, and/or other negative interactions with government or utility programs that leads to skepticism or distrust
- **Program Interventions:**
 - Outreach and business engagement to DAC corner stores and small businesses
 - Pre-install site visit and refrigerator selection support
 - Refrigerator installation
 - Post-install visit
 - Collaborate with other SoCalREN implementers as necessary based on sectors intended to be served
 - Education, outreach, and support regarding energy-efficient upgrades and the benefits of offering healthy food options

Small & Medium Business Energy Advisor Summary

● Program Description:

- The program will educate business owners about the cost of energy and the value of efficiency, connect owners to commercial sector EE programs, and support applications for low or no-cost financing for EE measures

● Market Barriers Addressed:

- Lack of awareness of SoCalREN commercial sector programs
- Confusion regarding EE program eligibility
- Limited staff time to participate in EE
- Lack of knowledge of current and future energy cost impacts on business
- Lack of awareness of financing products and benefits of loans, limited upfront capital, and the cost of capital for conventional debt financing

● Program Interventions:

- Outreach and business engagement
- Financial analysis, recommendations and referrals
- Financing application support and submission
- Project management support
- Stakeholder coordination
- Registration/enrollment

Cross-Cutting: Codes & Standards



Cross-cutting Codes & Standards Summary

- Why is SoCalREN offering this sector?
 - Local governments and other parties involved in C&S need help navigating the rapidly advancing landscape of policies, programs, and resources available to help them to meet and exceed state mandates and achieve decarbonized zero net energy (ZNE) buildings and communities. This program can help prepare local governments and the C&S community for quickly approaching EE, ZNE, and electrification mandates.
- What are the gaps that SoCalREN will be filling?
 - The SoCalREN approach will develop a comprehensive Compliance Enhancement Program template that addresses the entire compliance cycle, from building design to operation. This is something that is not covered by any existing IOU C&S programs. The Program will focus on systematic improvements along the entire permitting process spectrum, including innovative information channels and permit staff training resources to build capacity and competency.

Codes & Standards Strategies and Outcomes

Main Sector Strategies:

- Assist in developing and adopting Advanced Energy Codes and support local implementation strategies
- Provide tools, templates, and assistance to streamline permitting processes and improve compliance
- Use innovative information channels and training strategies to build permitting agency staff capacity and competency
- Develop tools and templates to support trade allies and their supply chains to promote and accelerate building electrification
- Collaborate with the administrators of benchmarking and energy performance rating tools and software

Main Sector Outcomes:

- Better energy code compliance, reduced energy use in buildings, and progress toward the state's energy efficiency and GHG reduction goals
- Adoption of advanced energy codes, standards, and policies that improve building energy performance and promote decarbonized and ZNE construction practices
- Collection and use of C&S data to inform better energy code compliance and the adoption/implementation of model energy codes, standards, and policies

Codes & Standards Program List

Program Name	New or Existing Program	Segment
Codes and Standards Program	New	n/a

Codes and Standards Program Summary

- **Program Description:**

SoCalREN will design and implement Codes and Standards (C&S) interventions within a framework for creating decarbonized zero net energy (ZNE) communities. SoCalREN seeks to accelerate local government leadership in energy efficiency, ZNE, and GHG goals through their regulatory authority over construction and land use.

- **Program Interventions:**

- Help local governments significantly improve energy code compliance in new construction and major remodels
- Assist local governments in the development, adoption, and implementation of model codes, standards, and policies that improve energy efficiency and reduce the carbon footprint of new and existing buildings
- Provide local governments with tools and training to analyze impacts from code compliance and code-development interventions through access to robust and actionable data

Residential Sector



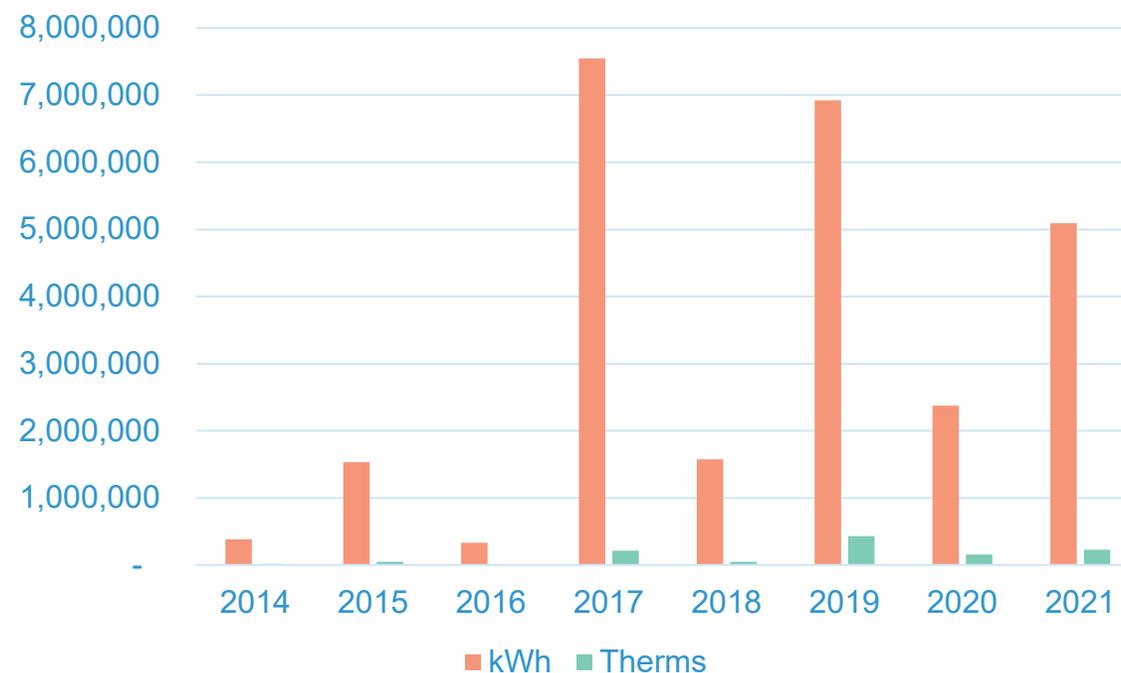
Sector Rationale

- **Why is SoCalREN offering this sector?**
 - Represents over 33% of electricity and 50% of natural gas usage
 - Home to more than 20 million residential customers living in nearly 7.5 million housing units.
 - More than 30% of these housing units are in multifamily properties with over 50% located in a DAC or considered HTR
- **What are the gaps that SoCalREN will be filling?**
 - Comprehensive solutions that address electric, gas and water efficiency
 - Increased focus on Normally Occurring Affordable Housing (NOAH), DACs and rural/HTR customers not sufficiently addressed by IOU programs
 - Address small properties (<50 units) which have a higher delivery cost due to lower savings achieved per project
 - Provide technical and project resources to address lack of expertise and capacity

Residential Sector Accomplishments

- 25 GWh and 1 million therms in annual savings achieved since 2015
- More than 220 multifamily properties retrofitted impacting nearly 45,000 tenant units
 - 50% of projects completed in DACs
- Saved customers over \$20M through lower energy bills
- Reduced GHG emissions by more than 24,000 metric tons of CO₂

Annual Energy Savings



Residential Program List

Program Name	New or Existing Program	Segment
Whole Building Comprehensive Energy Efficiency Multifamily	Existing	Resource Acquisition
Kits4Kids	Existing	Resource Acquisition
Small HTR Multifamily Direct Install	New	Resource Acquisition

Whole Building Comprehensive EE Multifamily

- **Program Description:** Turnkey solution that provides technical and financial services for multifamily properties over 50 units to help improve the efficiency and living conditions through comprehensive energy retrofit projects.

- **Market Barriers Addressed:**

Market Barriers Addressed	Program Tactics
<ul style="list-style-type: none"> • Timing and disruption of tenants • Lack of capital • Uncertain benefits • Split incentives 	<ul style="list-style-type: none"> • Whole building pathway for comprehensive projects • NMEC pathway to maximize savings potential • Site assessments that identify cost-effective retrofit measures • Technical and project management support • Menu of in-unit measures provided to tenants at no cost • Incentives based on savings achieved

- **Program Interventions:**
 - Whole building energy assessments
 - Comprehensive whole building EE upgrades
 - Increased incentive rates for DACs
- **Program Accomplishments to date:**
 - Over 224 completed projects since inception; 43% in DACs
 - 25.8 GWh since inception; 1.1 million therms

Kits4Kids Program

- **Program Description:** Provide families within HTR and/or DAC with a fun home-based educational activity that helps students connect concepts learned through science class and how the members of their household use energy at home.
- **Market Barriers Addressed:**
 - HTR and DAC households historically do not participate in EE programs.
 - Multifamily property owners may be hesitant to perform upgrades within tenant units due to the spread of COVID-19.
 - Due to high unemployment and increased energy costs, many households in the DAC and HTR areas currently face economic hardship.
- **Program Interventions:**
 - Provide elementary schools with no-cost self install measures that save energy and money.
 - Program materials will educate household members about energy efficiency and its financial and environmental impacts
- **Program Accomplishments to date:**
 - Enrolled 250 classrooms during 2021 launch

Small HTR Multifamily Direct Install

- **Program Description:** Provides turnkey EE measures that reduce electric, natural gas and water consumption of small apartment buildings with less than 50 units that are classified as HTR or DAC. The measures will be applicable to both tenant units and common areas, thereby reducing energy costs for both owners and tenants.

- **Market Barriers:**

Market Barriers Addressed	Program Tactics
<ul style="list-style-type: none"> • Lack of capital • Timing and disruption of tenants • Lack of capacity • Split incentives • Uncertainty about energy savings and other non-energy benefits 	<ul style="list-style-type: none"> • Direct install measures managed through qualified subcontractors • No cost direct installation of common area and tenant measures • Assigned program representatives based on region • Active engagement with local government partners and CBOs • Proposed EE solutions based on property needs • In-language support to address language barriers

- **Program Interventions:**
 - Provides streamlined, no-cost implementation of energy efficiency measures.
 - Provide multifamily owners technical expertise and knowledge through project managers and vetted contractors

Agriculture Sector



Agriculture Summary

- Why is SoCalREN offering this sector?
 - Agriculture sector has been historically underserved
 - As a result of D.21-05-031 and Avoided Cost Calculator updates, it will be increasingly challenging for non-RENs to serve underserved Ag customers
 - Recent SCE Ag Summary:

Year	Actual TRC	Actual PAC	Actual SCE Expenditures	SCE Business Plan Expenditures	Gap in spending
2019	0.34	0.43	\$2,330,112	\$3,181,000	(\$850,888)
2020	0.26	0.36	\$1,876,806	\$3,245,000	(\$1,368,194)
2021	0.35	0.48	\$747,238	\$3,180,000	(\$2,432,762)

- Gaps that SoCalREN Ag will be filling
 - Prioritize serving small and medium underserved Ag customers
 - Provide hands-on project delivery support
 - Offer EE measures that non-RENs cannot offer due to TRC limitations

Agriculture Strategies and Outcomes

- Agriculture Strategies:
 - 1) Prioritize program resources to historically underserved Ag customers
 - 2) Provide holistic approach to EE adoption for the Ag Sector
 - 3) Reduce the EE upgrade cost burden for underserved Ag customers
- Agriculture Outcomes:
 - 1) Leverage relationships with public sector customers (e.g. irrigation districts, rural water agencies and local governments) to build a stronger extended agricultural energy community
 - 2) Improve educational, technical, and capital access to the underserved Ag communities
 - 3) Facilitate substantial energy and water savings

Agriculture Sector Program List

Program Name	New or Existing Program	Segment
Ag Project Delivery Program	New	Market Support
Agriculture Retrofit	New	Resource Acquisition
Rural HTR Direct Install	New	Equity

The above Ag programs will collaborate with SoCalREN offerings from other sectors:

Program Name	Sector
EE Project Delivery Program	Public
Agriculture WE&T	WE&T
Rural HTR Agriculture Finance Assistance	Finance

Agriculture Project Delivery Program

- **Program Description:** Similar to the SoCalREN's Public PDP program, the Ag PDP will provide technical and project management services to help underserved Ag customers implement EE strategies.
- **Why is this program needed?**
 - Serve Ag customers who will continue to be underserved
 - Address stranded energy and water savings left by non-REN PAs
 - Streamline and simplify the custom incentive process for historically non-participating customers
- **Program Interventions:**
 - Support Ag customers throughout EE project lifecycle
 - Provide comprehensive and customized project management and technical engineering services
 - Address project challenges and proactively identify solutions

Agriculture Retrofit Program

- **Program Description:** The Ag-Retrofit program will coordinate with the Ag-PDP to assist underserved Ag customers implement custom retrofit solutions.
- **Why is this program needed?**
 - Serve Ag customers who will continue to be underserved
 - Address stranded energy and water savings left by non-REN PAs
 - Streamline and simplify the custom incentive process for historically non-participating customers
- **Program Interventions:**
 - Provide customized EE solutions for each Ag customer
 - Offer EE solutions that cannot typically be offered by non-REN PAs due to low TRC
 - Connect local vendors and contractors to underserved customers
 - Sample measure list: Booster Pump Overhaul, Booster Pump VSD Well Pump Overhaul, Well Pump VSD, Barn ventilation, greenhouse air distribution, etc.

Rural-HTR Agricultural Direct Install Program

- **Program Description:** The Ag-DI program will coordinate with the Ag-PDP to assist rural and HTR Ag customers implement direct install solutions.
- **Why is this program needed?**
 - Rural HTR Ag customers will continue to be underserved
 - Streamline and expand access to EE adoption and benefits
 - Simple approach for Ag customers to build EE knowledge
 - Lack of funding barrier will be overcome by DI approach
- **Program Interventions:**
 - Provide simple and no-cost EE solutions
 - Connect local vendors and contractors to underserved customers
 - Sample measure list: Outdoor Lighting, Indoor Lighting, Booster Pump Overhaul, Well Pump Overhaul, Greenhouses and Indoor Ag Heating, etc.

Cross Cutting: Workforce Education and Training (WE&T)



Workforce Education & Training Summary

- Why is SoCalREN offering this sector?
 - DAC/HTR communities face unique challenges and barriers to enter the EE sector
 - Designed to target and strengthen DAC/HTR participants specifically in order to create labor/worker pipeline to meet supply and demand
 - Meeting the CPUC's foci on supplier diversity (GO 156), increasing women-owned, minority-owned, disabled veteran-owned and LGBT-owned business enterprises' (WMDVLGBTBEs) procurement in all categories.
- What are the gaps that SoCalREN will be filling?
 - Increased EE resources for hard-to-reach (HTR) and disadvantaged communities (DAC)
 - Reduce labor Shortage in EE/construction/smart building technologies
 - Increase BIPOC residents and businesses with skills, jobs & business opportunities in green building technologies/high performance buildings
 - Reduce fragmented **and** misaligned workforce and small business ecosystem to support EE/RE through the Regional Workforce Alliance
- SoCalREN WE&T Accomplishments to-date
 - Over 440 contractors trained
 - Over 1,000 students enrolled in educational trainings
 - Over 190 paid internships awarded

WE&T Program List

Program Name	New or Existing Program	Segment
ACES	New	Equity
Green Path Careers	New	Equity
WE&T HUB	New	Market Support
E-Contractor Academy	New	Market Support
WE&T Agriculture	New	Equity

ACES Pathway

- **Program Description:** The Architecture Construction Engineering Students (ACES) Pathway Program, a career and experiential learning program is currently operating in various traditional high schools that serve severely disadvantaged youth. The goal of ACES is to expose and create pipeline to EE ACE careers by capitalizing on public works investment, community college STEM course offerings and strong industry participation.

- **Market Barriers:**

Barrier	Solution
Accessibility for youth of color to high road ACE careers	Outreach/recruitment will be done each semester in coordination with the high schools and community colleges.
Local hiring standards for DAC/HTR professional workers	Merge ecosystem of partner employers by identifying entry level opportunities in ACE high road careers
Limited entry-level ACE opportunities	Maintain strong employer relationships and seek out new prospective employers each year. Offer paid industry accepted certificate training every summer.
Accessibility to technology	Participants enrolled in the program will have the opportunity to borrow a laptop and access to hotspots in order to complete skills certification training.
Transportation	Participants will receive bus pass or gas reimbursement to travel to and from training site.
Clothing	Participant will receive clothing stipend for training/work site attire.

- **Program Interventions:**

- Increase diversity of students who pursue academic pathways in sustainability design and construction disciplines and develop mentoring between industry professionals and students.
- Create academic pathways, regardless of the participants' GPAs and socio-economic challenges, by employing a collaborative, proactive case management approach that engages high school principals and teachers, community college faculty members and administrators, and charter school executive directors

Green Path Careers

- **Program Description:** Prepare opportunity youth and adults by providing EE skilled training in order to acquire the skills and knowledge necessary to succeed in the high growth EE industry. The GPC program aims to widen the pool of eligible DAC/HTR participants by also including the returning citizens population in the workforce. The opportunity youth and adult population would help to create a pipeline in filling the demand for the skilled labor shortage in EE.

- **Market Barriers:**

Barrier	Solution
Access to Technology	Participants enrolled in the program will receive a laptop and access to hotspots in order to complete online certification training. Participants will also have access to a computer lab via one of our partners.
Transportation	Participants will receive a bus pass or gas reimbursement to travel to and from the training site.
Clothing	Participants will receive a clothing stipend for training/worksite attire.

- **Program Interventions:**

- Address the barriers opportunity youth and adults face when moving into the growing workforce, while addressing the EE workforce expansion needs
- Assist opportunity youth and adults by eliminating the barriers of the EE workforce sector, by providing certification training, supportive services, and the coaching needed to emerge successful by providing the resources and support needed to begin their EE career

WE&T Opportunity HUB

- Program Description:** Helps ensure local small-minority firms and disadvantaged workers in SCR region can effectively compete in the EE construction industry; to strengthen their knowledge, skills, and networks in the green building and clean energy sectors by creating a marketplace for employers/employees and serving as an opportunities clearinghouse.

- Market Barriers:**

Barrier	Solution
Support Services	Participants enrolled in the program will receive access to support services from partners such as technology, transportation, or clothing.
Access to Capital, bonding and Insurance	Participants enrolled in the program will receive help with capital, bonding, and insurance. The program goal is to partner with banks, CDFIs, and other associations to assist with the barrier.
EE/RE Outreach to DAC	Participants enrolled in the program will be informed through outreach measures set in place.
Lack of Peer Exchange	The development of a shared online platform/brokerage system for skilled workers and contractors to identify jobs and contracting opportunities.
Lack of EE Information	Participants in the program will receive ongoing training in new building codes, construction materials and equipment, project management software and estimating technologies, labor standards, construction administration, and project delivery methods (for example, P3s).
Fragmented workforce ecosystem	ECC entered into partnership alliance agreements with industry, community, and institutional partners to collectively address barriers to entry and growth and define strategies to maximize economic opportunity for communities of color.

- Program Interventions:**

- Organize the infrastructure needed to connect SoCalREN’s minority contractors and disadvantaged workers to capacity-building resources and opportunities

E-Contractor Academy

- Program Description:** Established to assist SMWDVBE contractors entering into the EE sector by providing access to resources, quality training, one on one assistance including: access to capital, bonding and insurance and procurement assistance, Fundamentals of Green Building. Contractors go through a comprehensive curriculum for emerging contractors in the EE space.

- Market Barriers:**

Barrier	Solution
Lack of small, minority contractors with green building knowledge and skills	Host workshops to increase MWDVBEs basic information and knowledge
Access to Capital, bonding and insurance	One-on-One technical assistance and workshops to increase contractors' access to capital, bonding and insurance.
Access to green building technologies and equipment/materials	Participants will receive training options, certificated programs, access to construction technologies, and equipment/materials.
Challenging public procurement policies and requirements	One-on-One technical assistance and RFP development

- Program Interventions:**

- Prepare small and diverse contractors to compete for and perform energy efficiency projects throughout Southern California; Contractors undergo training through a curriculum designed to achieve maximum outcomes and preparation
- Contractors enrolled benefit from the support and guidance offered by technical assistance managers and industry experts

WE&T Agriculture

- **Program Description:** The Ag-WE&T program will develop a local skilled workforce that delivers high quality Agricultural EE services to the SoCalREN region. The trained workforce will accelerate energy savings through SoCalREN's Rural HTR Ag DI and Ag-Retrofit programs.
- **Why is this program needed?**
 - Create a skilled local workforce through underserved communities to achieve energy and water savings.
 - Regional energy management training will ensure high quality installation of EE measures.
 - Create energy career pathways that will facilitate clean energy communities.
- **Program Interventions:**
 - Marketing and outreach events to promote clean energy job opportunities
 - Conduct trainings that lead to attractive energy career paths
 - Coordinate with Agriculture Sector and Ag-Finance offerings to enable market transformation

Cross-Cutting: Finance Sector



Cross-cutting Finance Summary

- Why is SoCalREN offering this sector?
 - Finance EE improvements through SoCalREN programs
 - Drives SoCalREN program participants to complete EE projects that would otherwise be left stranded
- What are the gaps that SoCalREN will be filling?
 - Up-front, 0% interest financing products
 - OBF is no longer available through Southern California Edison for public sector or agricultural customers given the closure of various incentive programs (Commercial Custom, Ind./Agricultural Custom, Deemed, Local Government Partnerships)

Cross-cutting Finance Summary

Sector Accomplishments to date:

- Participants accessed additional capital because SoCalREN leveraged non-CPUC funds of \$2.2M for investment in SoCalREN communities
- **\$2 million in funding disbursed** to public agency participants for EE projects
- **\$1.1 million in additional pipeline** identified to leverage funds once replenished
- **309,000 kWh and 749 therm** savings supported

Finance Program List

Program Name	New or Existing Program	Segment
Public Agency Revolving Loan Fund	Existing	Equity
Ag Finance	New	Market Support

Public Agency Revolving Loan Fund Summary

- **Program Description:** The RLF Program provides upfront loans to underserved public agencies to accelerate energy project implementation. Program funds will leverage seed capital through American Reinvestment and Recovery Act (ARRA) funds already granted by the California Energy Commission (CEC) and no utility ratepayer funds will be utilized for the loans.
- **Market Barriers Addressed:**
 - Help underserved communities overcome access to upfront capital for energy efficiency projects
- **Program Interventions:**
 - Loan application development support
 - Loan application review and approval
 - Upfront construction financing delivered to agencies through disbursement of loan funds

Rural HTR Agriculture Finance Summary

- **Program Description:** The Rural HTR Ag Finance program will provide upfront bridge funding for rural and HTR Ag customers to accelerate the completion of EE projects. The Ag Finance program will support the adoption of EE measures through SoCalREN's Ag offerings.
- **Market Barriers Addressed:**
 - Assist Rural HTR Ag communities overcome access barrier to upfront capital to implement EE projects.
- **Program Interventions:**
 - Loan application development support
 - Loan application review and approval
 - Upfront financing through loan fund disbursement

SoCalREN Business Plan Materials

- **Exhibit 1:** [SoCalREN 2024-2031 Strategic Business Plan](#)
- **Exhibit 2:** [SoCalREN Energy Efficiency 2024-2027 Portfolio Plan](#)
- **Exhibit 3:** [SoCalREN's Responses, pursuant to Energy Division Template](#)
- **Exhibit 4:** [SoCalREN Energy Efficiency 2024-2027 Implementation Plans](#)
- [SoCalREN 2024-2031 Portfolio Application Pleading Document](#)
- [SoCalREN Business Plan Application – Notice of Availability](#)
- [SoCalREN 2024-2031 Workpapers](#)
- [Budget Appendix](#)

Questions?

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Appendix



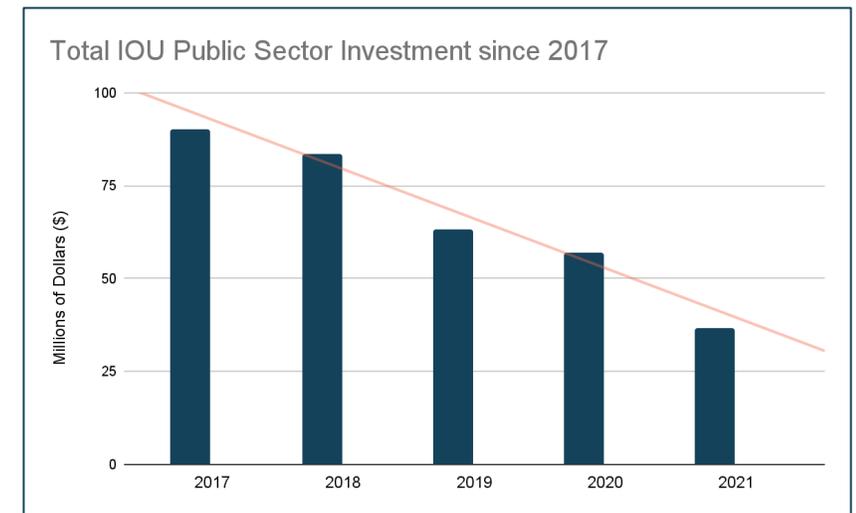
Public Sector



Public Sector Summary (1 of 2)

Public Sector Rationale

- Why is SoCalREN offering this sector?
 - Public agencies face unique challenges and barriers to action, exacerbated by the disruption caused by COVID-19
 - Investment in public sector has decreased significantly since 2017
 - Public sector customers' infrastructure serves the public good and is visible in the community. As a result, public agencies can “lead by example” and set the foundation of community resilience
- What are the gaps that SoCalREN will be filling?
 - Gap in public sector programs due to IOU program closures and transitions
 - Budget and staff resource constraints
 - Limited EE resources for hard-to-reach (HTR) and disadvantaged communities (DAC)
 - Limited services to overcome procurement challenges
 - Lack of trusted energy expertise and resources
 - Access to energy data
 - Support for stranded savings opportunities

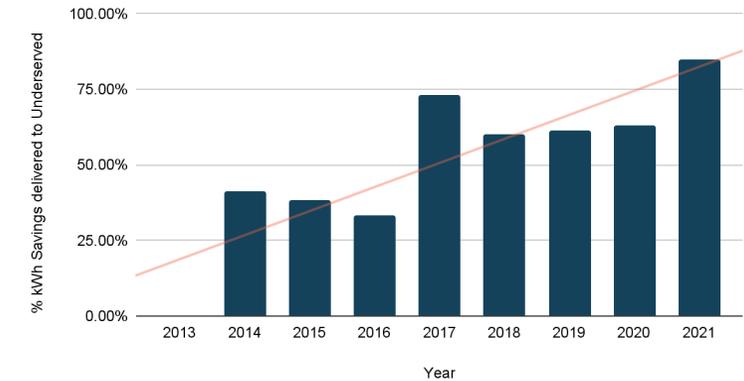


*Source: CEDARs SCE/SCG Budget Filing

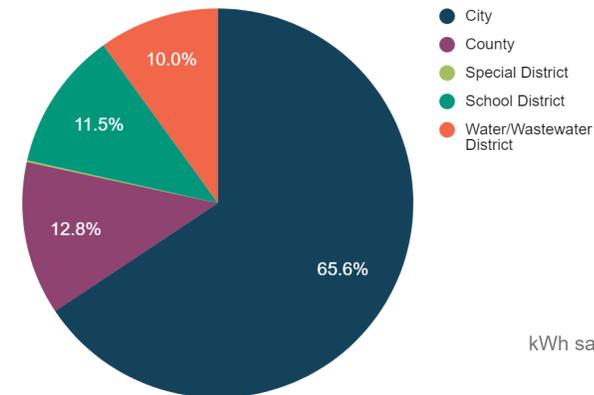
Public Sector Summary (2 of 2)

- **Previous Sector Accomplishments**
 - 95 GwH, 3.8MW, & 334K therms in annual savings delivered since 2013
 - 60% kWh savings delivered to underserved communities
 - 21,156 tons greenhouse gases (GHGs) emissions reduced
 - 641 projects completed, 49% of projects completed at underserved facilities
 - Over 200 public agencies enrolled
 - 57 million sq feet of building space benchmarked across 275 facilities
 - 120 comparative energy analyses produced
 - 5 regional partners under contract to support expanded reach of SoCalREN

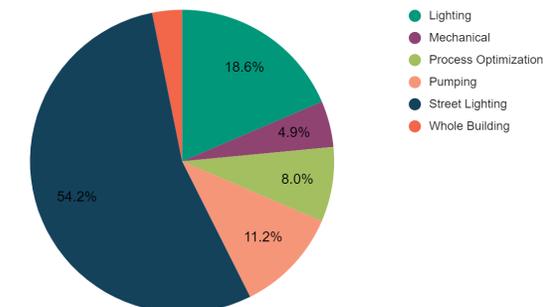
% kWh Savings delivered to underserved communities



Diversity of agencies served



kWh savings delivered to diverse project types



Public Sector Program List

Program Name	New or Existing Program	Segment
EE Project Delivery Program	Existing	Market Support
Disadvantaged Communities Distributed Energy Resource Program	Existing	Equity
Metered Savings Program	Existing	Resource Acquisition
Streamlined Savings Pathway	Existing	Resource Acquisition
Rural-HTR Public Agency Direct Install	New	Equity
Energy Resiliency Action Plan	New	Market Support
Regional Partner Initiatives	New	Market Support
Water and Wastewater Strategic Energy Management	New	Market Support
Underserved Schools Strategic Energy Management	New	Equity
Water Infrastructure Program	New	Resource Acquisition

EE Project Delivery Program Summary - Public

- Program Description: At no cost to agencies, the SoCalREN's Project Delivery Program (PDP) helps public agencies reduce energy costs through energy efficiency improvements. The program provides objective, third-party expertise customized to meet the unique needs of each enrolled agency and help them achieve their climate and energy goals. PDP identifies energy saving measures and works side-by-side with public agency staff throughout the project lifecycle, from performance specification to construction completion, to overcome barriers to implementing energy efficiency strategies.
- Market Barriers Addressed:

Public Sector Market Barriers							
Limited Staff Bandwidth	Lack of technical expertise	Funding and financing constraints	Confusing and disjointed program offerings	Procurement challenges	Limited access to actionable data for informed decision making	Risk aversion	Limited resources and knowledge of distributed energy resource opportunities and resources

EE Project Delivery Program Summary - Public

- Program Interventions:
 - Comprehensive and customized project management and technical engineering services
 - Services include: energy use analyses, benchmarking, project identification, measure lists, audits, financial analysis, financing application support, technical performance specification development, scope of work support, procurement support, agency approval services, construction support, project closeout support, incentive application closeout, project financing documentation support
 - Peer-to-peer best practice sharing and learning, interagency competitive models, agency recognition through case studies, webinars, newsletters etc.

Dedicated project management and technical support throughout a project lifecycle.



Engagement
& Enrollment



Portfolio
Energy
Analysis



Project
Identification
& Audit



Design &
Procurement



Construction



Hand-off

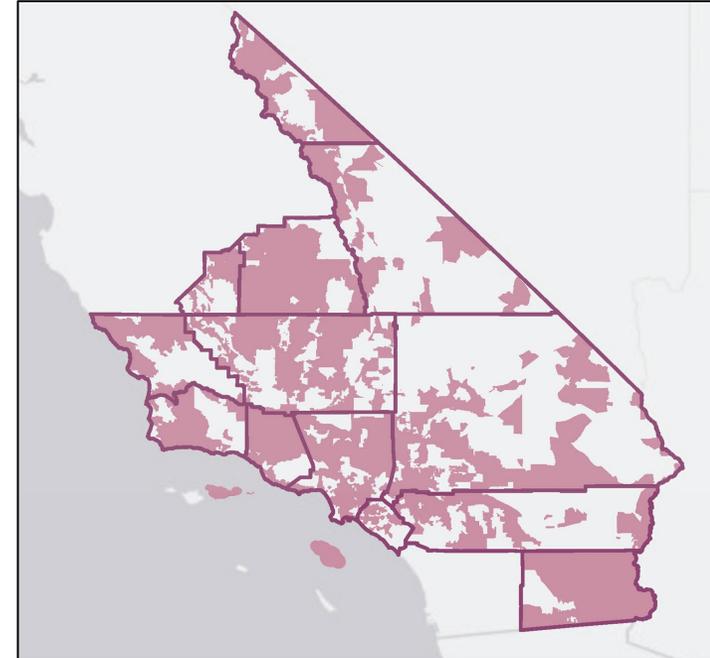
Disadvantaged Communities Distributed Energy Resource (DER DAC) Program

- Program Description:
 - Like the PDP, DER DAC identifies energy saving measures and works side-by-side with *DAC, rural, and low-income* public agency staff throughout the project lifecycle to overcome barriers to implementing energy efficiency strategies. DER DAC includes distributed energy resources (DER) and sustainability strategies during project identification and provides educational information and resources for integrating DERs in energy efficiency projects to maximize energy efficiency opportunities, drive the integration of DERs, and help public agencies achieve zero net energy (ZNE).
 - **DER audit and technical assistance & enhanced benchmarking through non-ratepayer funding**
- Market Barriers Addressed:

Underserved Public Agency Market Barriers								
Limited Staff Bandwidth	Lack of technical expertise	Funding and financing constraints	Confusing and disjointed program offerings	Procurement challenges	Limited access to actionable data for informed decision making	Risk aversion	Limited resources and knowledge of distributed energy resource opportunities and resources	Lack of comprehensive IDSM program offerings go beyond EE and offer DER support

Distributed Energy Resource Disadvantaged Communities Program Summary - Public

- Program Interventions:
 - Comprehensive and customized EE project management and technical engineering services for facilities in underserved communities
 - High-level review of DER options
 - Project delivery services: energy use analyses, benchmarking, project identification, measure lists, audits, financial analysis, financing application support, technical performance specification development, scope of work support, procurement support, agency approval services, construction support, project closeout support, incentive application closeout, project financing documentation support
 - Peer-to-peer best practice sharing and learning, competitive models, agency recognition through case studies, webinars, newsletters etc.
 - DER and sustainability strategy opportunity reports delivered with EE audits



Map showing DAC, very low-income, rural communities in SoCalIREN territory highlighted in pink

Project Delivery Program & Distributed Energy Resource Disadvantaged Communities Program Summary - Public

- **Previous Program Accomplishments:**

- 203 public agencies enrolled; 72% DAC & HTR
- 95 GwH, 3.8MW, & 334K therms in annual savings delivered since 2013
 - 60% kWh savings delivered to underserved communities
- 21,156 tons GHGs reduced
- 641 projects completed, 49% of projects completed at underserved facilities
- Over \$14 million annual cost savings achieved
- \$47 million funding and financing supported and secured (incentives and OBF)
- 57 million sq feet of building space benchmarked across 275 facilities
- 120 comparative energy analyses produced
- 74 Pathway to Zero reports highlighting DER & sustainability strategy information and resources
- 5 regional partners under contract to support expanded reach of SoCalREN
- 1323 jobs created
- \$3,685,000 non-ratepayer funding leveraged to support EE & DER projects

EE Project Delivery Program – Key Targets and Metrics

Metric	2024	2025	2026	2027	Total
kWh savings channeled to resource programs	13,200,000	18,000,000	21,000,000	20,400,000	72,600,000
kW savings channeled to resource programs	2,849	3,661	4,230	4,103	14,843
therm savings channeled to resource programs	67,211	82,641	164,242	105,141	419,235
GHGs avoided	3,070	3,473	4,364	3,787	14,694
# of agency enrollments	16	17	18	19	70
# of workshops/webinars/ training events delivered	15	16	17	18	66
# of projects completed	35	37	39	41	152

Disadvantaged Communities Distributed Energy Resource Program – Key Targets and Metrics

Metric	2024	2025	2026	2027	Total
kWh savings channeled to resource programs	8,800,000	12,000,000	14,000,000	13,600,000	48,400,000
kW savings channeled to resource programs	1,899	2,440	2,820	2,735	9,895
therm savings channeled to resource programs	44,807	55,094	109,495	70,094	279,490
GHGs avoided	2,046	2,315	2,909	2,525	9,796
# of agency hard to reach/DAC enrollments	16	17	18	19	70
# of marketing and outreach materials delivered	15	16	17	18	66
# of agencies engaging in more than one EE service	50	53	56	59	218
# of Pathway to Zero reports delivered	45	47	49	51	192
# of projects completed	30	32	34	36	132
\$ value of non-ratepayer funding leveraged to enhance program offerings	\$500,000	\$750,000	\$1,000,000	\$1,500,000	\$3,750,000

Metered Savings Program Summary - Public

- **Program Description:** Leverages a normalized metered energy consumption (NMEC) approach with a focus maintaining long-term and persistent energy savings
- **Market Barriers Addressed:** Limited program offerings for savings below code, lengthy project review and processing times, lack of available funding and financing, lack of resources and technical expertise in public sector to pursue EE programs, lack of understanding of ongoing energy savings and project value
- **Program Interventions:** Downstream market channel with incentives based on lifecycle avoided GHG emissions; focus on equity by providing higher incentive rates to underserved communities; ongoing project energy saving reports
- **Previous Program Accomplishments:** Since its launch in 2019, the SoCalREN Metered Savings Program has contributed toward California's emission reduction goals by achieving 1,970,075 kWh and 413 kW in energy savings

Metered Savings Program – Targets and Metrics

Metric	2024	2025	2026	2027	Total
Gross kWh	4,589,530	6,345,612	5,782,239	6,108,670	22,826,051
Gross kW	686	952	869	918	3,425
Gross Therms	1,500	1,650	1,815	1,997	6,962
TRC	0.25	0.26	0.27	0.29	0.27
PAC	1.40	1.73	1.72	2.09	1.74

Streamlined Savings Pathway Summary - Public

- **Program Description:** Expedited program pathway offering deemed and custom incentives based on lifecycle avoided GHG emissions
- **Market Barriers Addressed:** Limited program offerings with a focus on underserved public agencies, cost of delay from lengthy project review and processing times, lack of available funding, lack of resources and technical expertise in public sector to pursue EE programs
- **Program Interventions:** Downstream market channel with incentives based on lifecycle avoided GHG emissions; focus on equity by providing higher incentive rates to underserved communities
- **Previous Program Accomplishments:** Planned launch in Q1 2022. Viable program pathway offered to public agencies to capture verifiable electric savings no longer eligible for support nor incentives due to SCE's program closures

Streamlined Savings Pathway – Targets and Metrics

Metric	2024	2025	2026	2027	Total
Gross kWh	4,764,378	6,943,513	9,552,968	8,645,047	29,905,906
Gross kW	673	910	1,228	1,125	3,936
Gross Therms	145,716	174,958	230,901	211,692	763,267
TRC	0.56	0.49	0.46	0.47	0.53
PAC	1.77	1.32	1.42	1.03	

Rural-HTR Small Public Agency Direct Install Summary - Public

- **Program Description:** The program provides no cost energy efficiency retrofits at underserved public agency facilities with < 20 kW of peak demand usage.
- **Program Rationale:**
 - Market Barriers Addressed:
 - Limited staff bandwidth and resources to devote to energy efficiency
 - Lack of technical expertise
 - Funding and financing constraints
 - Confusing and disjointed program offerings
 - Procurement challenges
 - Limited access to actionable data for informed decision making
 - Risk aversion
 - Limited resources and knowledge of distributed energy resource (DER) opportunities

Rural-HTR Small Public Agency Direct Install Summary - Public

- **How is this program complementary and/or filling a gap?**
 - The program will serve smaller, underserved public agency facilities that are unsupported by other energy efficiency programs by offering installation of a range of prescribed energy efficiency measures
- **Target Market:**
 - SoCalREN's DI Program will target enrolled and unenrolled small, equity-focused (DAC, low-income, rural) public agencies within SoCalREN's service territory. Public agencies eligible for program services include cities, counties, tribes, school districts, water districts, sanitation districts and other special districts.

Rural-HTR Small Public Agency Direct Install Summary - Public

- **Program Interventions:**

- Dedicated project manager to work with the agency from project start to finish
- Technical expertise and knowledge for public agencies through the project manager and vetted contractors
- A single point of contact, the SoCalREN Project Manager, will bring all available energy efficiency program resources to public agencies to help them navigate program opportunities
- Program will overcome procurement challenges by helping agencies circumvent the typically arduous public procurement processes
- The project manager and DI contractor will coordinate to deliver comprehensive details on energy efficiency savings opportunities to facilitate agency decision making.
- The DI Program will provide resources and highlight opportunities for potential DER actions after project closeout to encourage the agency to go beyond energy efficiency on a path to a clean energy future

Rural-HTR Small Public Agency Direct Install Summary - Public

- **What does SCR aim to achieve/accomplish through this program?**

SoCalREN's DI Program unlocks stranded energy savings for public sector customers whose projects would otherwise be left behind in the transition to a clean, safe, secure, and affordable energy future.

Additionally, the DI Program is designed to help small, underserved agencies overcome barriers to energy projects and is designed to address market barriers by providing streamlined, no-cost implementation of energy efficiency measures.

- **How does program satisfy REN criteria?**

REN Criteria	DI Program
Fill gaps by conducting activities that the IOUs cannot or do not intend to undertake.	3P resource programs with high cost effectiveness criteria do not target smaller customers with low energy savings potential. The DI program specifically targets these underserved customers.
Serve hard-to-reach (HTR) markets by conducting activities in hard-to-reach markets, whether or not there is a current IOU program that may overlap.	The DI Program focuses solely on hard to reach public agency customers (pending approval of policy recommendation).

Rural-HTR Small Public Agency Direct Install – Targets and Metrics

Metric	2024	2025	2026	2027	Total
Net GWh	541,169	1,082,337	1,400,246	2,300,073	5,323,825
Net kW	47	94	124	263	528
Net Therms	3,089	6,110	7,318	6,814	23,331
TRC	0.13	0.16	0.15	0.14	0.15
Targets (# of facilities)	50	100	120	140	410

Energy Resiliency Action Plan Summary - Public

- **Program Description:** Focused on developing an EE and DER deployment roadmap to establish and/or strengthen the resilience of critical community infrastructure. The Program will generate regional maps highlighting climate and socioeconomic indicators to support agencies with regional planning and prioritization of project implementation.
- **Program Rationale:** Many public agencies lack the resources, expertise, or knowledge to create meaningful and implementation-ready plans that will prepare them to support their communities in a state of emergency. The ERAP Program strives to integrate cost-effective energy implementation strategies into resiliency action planning to help public agencies take meaningful energy actions and improve community resilience.
- The ERAP program removes the burden for participating agencies of creating their own tools. It enables agencies to share resources on a community-wide scale. The program helps ensure that scarce staff and financial resources are used effectively by using data to understand which opportunities are best and to identify regional efficiencies to achieve local and regional energy goals. Public agencies currently lack a tool to assist with community-scale energy resilience planning. Therefore, the program will provide a regional mapping tool to assist with project prioritization based on economic feasibility, climate-related threats, and socioeconomic factors.

Energy Resiliency Action Plan Summary - Public

- **Target Market:** cities, counties, tribes, k-12 school districts, community colleges, public universities, water and wastewater districts, special districts, federal, and state agencies. Resources will be prioritized for underserved areas in the market.
- **Program Interventions:** Downstream Strategy - Data collection, analysis and long-term planning
 - Engage agencies across departments and key community partners on priorities and opportunities for community-wide energy and resiliency planning
 - Establish agency's energy, resiliency, and carbon reduction related goals
 - SoCalREN will collect agency-level and community-wide data to inform the development of ERAPs
 - Develop interactive map with energy baselines and assess the vulnerability of assets
 - Support prioritization of energy resiliency targets and actions for critical operations and community infrastructure
 - Long-term support for the necessary and ongoing adaptations of the ERAP that emerge as a result of changing resiliency threats and opportunities
 - Support agency governing board approval for ERAP

Energy Resiliency Action Plan Summary - Public

- **What does SCR aim to accomplish through this program?**
 - 1) Supply public agencies with a pipeline of shovel-ready project opportunities
 - 2) Position public agencies to capture future grant funding opportunities
 - 3) Position public agencies as resiliency leaders among peers and in their communities
 - 4) Serve as a guiding document to protect facilities and communities from climate and energy-related threats

- **How does program satisfy REN criteria?**

REN Criteria	ERAP Program
Fill gaps by conducting activities that the IOUs cannot or do not intend to undertake.	The ERAP program will fill gaps by leading public agency-focused energy resiliency planning and project deployment strategies which are activities the IOUs do not intend to undertake.

Energy Resiliency Action Plan – Targets and Metrics

Metric	2024	2025	2026	2027	Total
Reports Adopted	4	6	8	12	30
Reports Developed	8	10	14	18	50
Reports Initiated	11	14	18	22	65
Stakeholder/Community Outreach Events	14	16	22	28	80
Number of Stakeholders Engaged in ERAP Process	250	290	400	510	1,450
Agencies Included in Energy Usage Data Database	8	10	14	18	50

Regional Partner Initiatives Summary - Public

- **Program Description:** Regional Partner Initiatives are established to better address the diverse needs of public agencies in the SoCalREN territory. The program leverages regional partners to test new and innovative intervention strategies that can then be scaled as appropriate to other regions.
- **Program Rationale:** Through an open initiative application, this program creates an opportunity to test new ideas in a space where other avenues have closed due to program changes and closures. It is designed to offer an opening to create more customized services to address public sector market gaps and fulfill unique regional needs. It further aims to increase agency participation in such programs and build up trust and continual improvements in energy efficiency programs uptake, more broadly.
- **Market Barriers Addressed:** Regional Partner Initiatives are designed to address a variety of barriers that have traditionally hindered uptake of energy efficiency programs in under-resourced communities. The intent is to overcome lack of program customization, better fulfill regional needs, and address specific gaps.

Regional Partner Initiatives Summary - Public

- **Target Market:** cities, counties, tribes, k-12 school districts, community colleges, public universities, water and wastewater districts, special districts, federal, and state agencies. Resources will be prioritized for underserved areas in the market.
- **Program Interventions:**
 1. Develop a simplified initiative application for regional partners to submit ideas and proposals
 2. Hold regular discussions with regional partners to develop ideas
 3. Prepare application submissions for evaluation and discussions of feasibility
 4. Hold debriefs with regional partners to discuss initiative approval status and next steps
 5. Collaborate with other SoCalREN implementers as necessary based on sectors intended to be served

Regional Partner Initiatives Summary - Public

- How does program satisfy REN criteria?

REN Criteria

Fill gaps by conducting activities that the IOUs cannot or do not intend to undertake.

Pilot innovative solutions by conducting activities where there is no current IOU program offering, and where there is potential for scalability to a broader geographic reach, if successful.

Regional Partner Initiatives

Regional Partner Initiatives will fill gaps by leading innovative projects and strategies focused on public agencies that fulfill unique regional needs and that the IOUs do not intend to undertake.

Regional Partner Initiatives are also designed to be tested and scaled out where successful and possible.

Regional Partner Initiatives – Targets and Metrics

Metric	2024	2025	2026	2027	Total
Applications Submitted	5	5	5	5	20
Initiative applications approved as customized offerings	3	4	4	4	15
Implementation plans prepared	0	1	2	2	5
EJ communities served	5	15	25	55	100
Initiatives scaled to meet diverse needs	0	1	1	1	3

Water and Wastewater Strategic Energy Management Summary - Public

- **Program Description:** The Water and Wastewater Strategic Energy Management (WWSEM) program helps public agencies with municipally-owned potable water systems and wastewater treatment plants (WWTP) expedite comprehensive peak demand reduction projects. WWSEM offers monetary incentives based on peak demand reductions and comprehensive start-to-finish project support. The SEM approach creates a foundation for sustained cost-effective peak demand and energy savings by fostering management and staff's knowledge, ability, and willingness to integrate strategic energy decisions into their workflow.
- **Program Rationale:**
 - **Market Barriers Addressed**
 - Limited program services for peak demand reduction strategies
 - W/WW customers' funding and financing constraints
 - Limited staff bandwidth
 - Risk-aversion among water operators
 - **How is this program complementary and/or filling a gap?**
 - There are no holistic SEM programs offered to water and wastewater agencies
 - No existing programs target peak demand savings within water and wastewater agencies

Water & Wastewater Strategic Energy Management Summary - Public

- **Target Market:** Public sector customers with potable water systems and wastewater treatment plants (WWTP).
- **Program Interventions:** Technical Assistance and Incentive intervention strategies.
 - Two phased approach with a focus on quick wins in phase one and more capital intensive and complex capital measures delivering energy and peak demand savings in phase two
 - Development of an SEM Roadmap to set energy and operational goals
 - Training workshops to identify, prioritize, and implement energy savings actions
- **What does SCR aim to achieve/accomplish through this program?** The program will help public agencies set goals and take actions to reduce peak period charges. It will identify opportunities to install more efficient equipment, implement smart building control systems, educate building occupants and WWTP and system operators on behavioral energy conservation practices, and facilitate load shifting DER technologies and strategies.

Water & Wastewater Strategic Energy Management Summary - Public

- How does program satisfy REN criteria?

REN Criteria	Water and Wastewater Strategic Energy Management Program
<p>Fill gaps by conducting activities that the IOUs cannot or do not intend to undertake.</p>	<p>Anticipated third party programs supporting water and wastewater agencies will have high cost effectiveness criteria and will not target smaller customers with low energy savings potential. The WWSEM program will support the agencies that are excluded from third party program opportunities.</p>
<p>Pilot innovative solutions by conducting activities where there is no current IOU program offering, and where there is potential for scalability to a broader geographic reach, if successful.</p>	<p>Offering an SEM approach as a program to a new sector—public agency water and wastewater customers—can be considered a pilot. If proven successful, the model can be replicated and or scaled.</p>

Water & Wastewater Strategic Energy Management – Targets and Metrics

Metric	2024	2025	2026	2027	Total
Net GWh	4,937,538	5,914,993	5,892,785	5,875,827	22,621,143
Net kW	2,589	3,134	3,121	3,112	11,956
TRC	0.25	0.24	0.25	0.26	0.25
PAC	0.60	0.53	0.55	0.57	0.56

Underserved Schools Strategic Energy Management Summary - Public

- **Program Description:** This program will engage building occupants and staff on systematic energy management best practices and will develop climate and energy leadership across staff, administrators, and educators. It is designed to help local educational agencies develop, implement, and maintain comprehensive energy load management strategies.
- **Program Rationale:**
 - **Market Barriers Addressed:** Schools often lack the knowledge and capacity to turn energy savings opportunities into action.
 - **How is this program complementary and/or filling a gap?** Existing programs do not offer long-term energy management guidance or targeted training and behavioral capacity building strategies that would lead to persistent energy savings and grid peak demand reductions. This program will provide that support to schools and community colleges.
- **Target Market:** K-12 schools and community colleges in equity-focused communities.

Underserved Schools Strategic Energy Management Summary - Public

- Program Intervention Strategies
 - Designated SCR Project Manager supports participants throughout program
 - Provide tools, templates, and guidance to support K-12 school districts and community colleges with their long-term strategic energy planning
 - Help each agency customize their SEM roadmap and develop long term goals
 - Facilitate capital project implementation
 - Training and workshops
 - Conduct an energy treasure hunt at each site to identify, prioritize, and implement their short-term and long-term district-wide energy savings actions
 - Develop and help agencies integrate energy efficiency curriculum
 - Energy conservation behavioral campaigns
 - Participants will learn how to integrate career technical education (CTE) or workforce development opportunities to involve students in energy efforts and support limited staff regarding energy management
 - Expand one-stop EE project delivery to include integrated demand side management (IDSM) audits and recommendations
 - Refresher workshops and annual/semiannual convenings for ongoing learning about current energy efficiency initiatives and peer-to-peer learning and best practices

Underserved Schools Strategic Energy Management Summary - Public

- What does SCR aim to accomplish through this program?
 - By using an SEM approach, the program will support peak demand reduction strategies and deep energy efficiency retrofits through a minimum of 3 year engagements with cohorts of schools.
 - The program will help underserved schools and community colleges set goals and take actions to reduce peak period charges.
 - SCR will support program participants by: identifying opportunities to install more efficient equipment, implementing smart building control systems, educating building occupants (such as students and educators) on behavioral energy conservation practices, and shifting load using DER technologies and strategies.

Underserved Schools Strategic Energy Management Summary - Public

- How does program satisfy REN criteria?

REN Criteria	USSEM Program
Fill gaps by conducting activities that the IOUs cannot or do not intend to undertake.	The USSEM Program will fill gaps by offering long-term energy management guidance, targeted training, and behavioral capacity building strategies at underserved schools. There are no existing SEM energy efficiency programs offered to school districts.
Serve hard-to-reach (HTR) markets by conducting activities in hard-to-reach markets, whether or not there is a current IOU program that may overlap.	The USSEM Program focuses solely on the hard to reach school districts.
Pilot innovative solutions by conducting activities where there is no current IOU program offering, and where there is potential for scalability to a broader geographic reach, if successful.	Application of the SEM design to schools is in itself an innovative pilot.

Underserved Schools Strategic Energy Management – Targets and Metrics

Metric	2024	2025	2026	2027	Total
Net GWh	818,474	1,091,300	3,001,072	3,001,071	7,911,917
Net kW	219	292	802	801	2,114
TRC	0.12	0.10	0.18	0.19	0.59
Target # of facilities receiving energy benefits	24	27	30	36	117
Target # of energy workshops	3	3	3	3	12
Target # of SEM roadmaps developed	8	9	10	12	39
Target # of CTE/workforce development curriculum and other opportunities created and offered	0	3	3	3	9

Water Infrastructure Program - Public

- **Program Description:** The Water Infrastructure program is a downstream offering that supports long-term EE solutions to water production, distribution, and treatment systems.
- **Why is this program needed?**
 - Water infrastructure staff usually cannot identify and implement EE projects
 - Utility programs have cost-effectiveness restrictions and can only offer simple solutions
 - Complex and time intensive EE water infrastructure projects will be stranded
- **How does program satisfy REN criteria?**
 - Other PAs will be unable to offer long-term measures that are not cost-effective

Water Infrastructure Program - Public

● Program Interventions

- 1st year of program will be focused on working with customers to plan complex water projects such as wastewater mixing, ultraviolet controls, and pump sequencing projects.
- 2nd year of program will deliver initial savings through shorter-term opportunities such as behavioral and retro-commissioning measures.
- Program will achieve significant energy benefits within 3rd and 4th year of program through completion of multi-year custom projects that were identified in year 1.

Program Year	Measure Mix
Year 1	No savings delivery
Year 2	Less cost-effective BRO and AOE measures
Year 3	Custom and 25% deemed mix
Year 4	Custom and 25% deemed mix

Metric	2024-2027 Targets
Net GWh	19.6
Net MW	1.9
Net Therms	8,000

Commercial Sector





Commercial Summary

Why is SoCalREN offering this sector?

- ~44% of all commercial building energy usage in the United States can be attributed to small businesses.
- Small businesses have limited opportunities to participate in EE programs due to facility size and low energy consumption.
- This sector serves customers that are ineligible to participate or neglected in other EE programs based on its focus on small facilities.

What are the gaps that SoCalREN will be filling?

- The SMB segment is underserved by EE programs which have emphasized short term energy savings and high-cost effectiveness in the large commercial sub-segment
- SCE Commercial Custom and Deemed programs have closed, leaving commercial customers without viable pathways for EE program



Commercial Strategies and Outcomes

- SoCalREN Commercial Strategies:
 - 1) Participants receive information about energy savings opportunities and the benefits of energy efficiency
 - 2) Mitigate out-of-pocket cost barriers for small and medium hard-to-reach businesses by delivering seamless no-cost EE measures and strategies
 - 3) Encourage the adoption and proliferation of EE measures and practices in the commercial sector by recognizing local business leaders for excellence in facility energy management
- SoCalREN Commercial Outcomes:
 - 1) Participating businesses recognize the relationship between energy efficiency, business operations, and sustainable long-term growth
 - 2) Commercial sector participants achieve energy cost reductions ranging from 10-25% on their utility bills
 - 3) Businesses adopt more sustainable energy practices in their operations over the long term



Sector Program List

Program Name	New or Existing Program	Segment
Small Commercial Direct Install Program	New	Equity
California Green Business Network Program	New	Market Support
Food Desert Energy Equity Program	New	Equity
Small & Medium Business Energy Advisory	New	Market Support

Small Commercial Direct Install Program Summary - Commercial

- **Program Description:** The program provides no-cost energy efficiency retrofits at small commercial facilities.
- **Program Rationale:**
 - Market Barriers Addressed:
 - Limited energy efficiency program applicability for small facilities and small projects
 - Limited staff to implement energy efficiency and energy efficiency is deprioritized
 - Limited energy usage and energy efficiency awareness
 - Funding and financing constraints
- **How is this program complementary and/or filling a gap?**
 - The program will serve smaller, underserved commercial facilities that are unsupported by other energy efficiency programs by offering installation of a range of prescribed energy efficiency measures

Small Commercial Direct Install Program Summary - Commercial

- **Target Market:**
 - Small commercial stores in hard-to-reach areas. Stores will be identified after coordinating with the SoCalREN Business Energy Advisor Program and conducting market studies to identify the customer segments that will benefit most from this program.
- **Program Interventions:**
 - What does SoCalREN aim to accomplish through this program?
 - The DI program unlocks stranded energy savings for small, HTR commercial customers whose projects would otherwise be left behind in the transition to a clean, safe, secure, and affordable energy future.
 - The program is designed to help small commercial facilities overcome barriers to energy projects. It is designed to address market barriers by providing streamlined, no-cost implementation of energy efficiency measures.

Small Commercial Direct Install Program Summary - Commercial

- How does program satisfy REN criteria?

REN Criteria	Small Commercial Direct Install Program
Fill gaps by conducting activities that the IOUs cannot or do not intend to undertake.	The IOUs are not serving this target customer group with targeted measure solutions.
Serve hard-to-reach (HTR) markets by conducting activities in hard-to-reach markets, whether or not there is a current IOU program that may overlap.	This program targets and serves HTR business customers.

Small Commercial Direct Install Program

– Targets and Metrics

Metric	2024	2025	2026	2027	Total
Net GWh	229,500	382,500	255,000	286,875	1,153,875
Net kW	56	93	62	70	281
Net Therms	0	0	0	0	0
TRC	0.06	0.06	0.05	0.04	0.05
Targets (# sites)	50	100	125	150	425

California Green Business Network Program Summary - Commercial

- **Program Description:** Promotes and expands the existing California Green Business Network (CAGBN) and offers services and incentives to achieve green business certification.
- **Program Rationale:**
 - **Market Barriers Addressed:** Providing small businesses with individual attention to identify reductions and access to resources to make improvements.
 - **How is this program complementary and/or filling a gap?** SCE and SCG are not offering any similar activities currently and do not have any outstanding 3P solicitations to meet this target market group.
- **Target Market:** HTR businesses

California Green Business Network Program Summary - Commercial

- **Program Interventions:**
 - Audit to identify opportunities
 - Education for short-term and long-term savings
 - Incentives for energy efficiency equipment
 - Recognition to promote business within community
- **What does SoCalREN aim to accomplish through this program?** By taking a holistic approach to sustainability, this program attracts businesses looking to demonstrate to the community and their customers that they are a green business. Certification requires businesses to take action to improve energy efficiency, conserve water, reduce waste, and use alternative forms of transportation. The program also helps reduce businesses operating costs and realize other non-energy benefits.

California Green Business Network Program Summary - Commercial

- How does program satisfy REN criteria?

REN Criteria

Fill gaps by conducting activities that the IOUs cannot or do not intend to undertake.

Serve hard-to-reach (HTR) markets by conducting activities in hard-to-reach markets, whether or not there is a current IOU program that may overlap.

CAGBN Program

SCE and SCG are not offering any similar activities currently and do not have any outstanding 3P solicitations to meet this target market group.

This program focuses on serving HTR businesses.

California Green Business Network Program – Targets and Metrics

Metric	2024	2025	2026	2027	Total
# of businesses that receive incentives to achieve CABGN certification	75	84	94	105	358
# of HTR businesses that receive incentives to achieve CABGN Certification	39	44	49	55	187
# of businesses supported by the program that recertify through CAGBN	8	10	14	22	54
# of HTR businesses supported by the program that recertify through CAGBN	5	6	8	12	31

Food Desert Energy Efficiency Equity Program Summary - Commercial

- **Program Description:** The Food Desert Energy Efficiency Equity (FDEEE) program is an initiative designed to support corner stores and small businesses within food deserts across the SoCalREN region. It provides healthier food options and funds new energy-efficient refrigerators. Through this initiative, store owners save on energy usage and utility bills while providing fresh and healthy food options for the communities they serve.
- **Program Rationale:**
 - **Market Barriers Addressed:**
 - High cost of time and effort to research, purchase and install EE equipment
 - High cost of time and effort to ensure proper recycling and management of inefficient equipment
 - Limited staff bandwidth and training
 - Limited funding available for EE upgrades
 - Limited understanding and/or access to EE programs due to lack of coordination between EE programs and fragmented messaging for customers
 - Challenging to engage under resourced small/medium businesses in sustainability improvements
 - Limited or no energy efficient refrigerator space dedicated to healthy food options in markets within food deserts
 - History of marginalization, environmental racism, and/or other negative interactions with government or utility programs that leads to skepticism or distrust

Food Desert Energy Efficiency Equity Program Summary - Commercial

- **How is this program complementary and/or filling a gap?**
 - Addresses the current challenges that exist within food deserts
- **Target Market:** Corner stores and/or small commercial businesses with applicable refrigerant units located throughout the region of SoCalREN. Only properties in low-income neighborhoods and DACs will be eligible.
 - Corner stores
 - Small business grocers
 - Cafes and small-scale independent restaurants

Food Desert Energy Efficiency Equity Program Summary - Commercial

- **Program Interventions:**

- Outreach and business engagement to DAC corner stores and small businesses
- Pre-install site visit and refrigerator selection support
- Refrigerator installation
- Post-install visit
- Marketing support
- Education, outreach, and support regarding energy-efficient upgrades and the benefits of offering healthy food options

- **What does SoCalREN aim to accomplish through this program?**

- Address the current challenges that exist within food deserts
- Install EE measures and reduce peak demand savings
- Reducing GHG emissions, eliminate hydrofluorocarbons (HFCs)
- Promote healthy food options
- Education regarding energy-efficient upgrades and the benefits of offering healthy food options.
- Assist small commercial businesses to overcome common barriers
- Assess intervention strategies and promoting strategies to align financial, energy, and community benefits for small commercial owners

Food Desert Energy Efficiency Equity Program Summary - Commercial

- How does program satisfy REN criteria?

REN Criteria

Program

Fill gaps by conducting activities that the IOUs cannot or do not intend to undertake.

The IOUs are not serving this target customer group with these measures, focused on refrigeration.

Serve hard-to-reach (HTR) markets by conducting activities in hard-to-reach markets, whether or not there is a current IOU program that may overlap.

This program targets and serves HTR business customers.

Food Desert Energy Efficiency Equity Program – Targets and Metrics

Metric	2024	2025	2026	2027	Total
Net first year kWh	255,596	833,852	1,043,576	1,250,778	3,383,802
Net first year kW	3	5	7	8	23
# of Stores Receiving Services (high engagement)	150	200	250	300	900
# of New EE Refrigerators Installed	300	400	500	600	1,800
Number of community members engaged through events (low engagement)	675	900	1125	1300	4,000
Expected first-year bill savings in total \$	Target to be added after first year of tracking				

Small & Medium Business Energy Advisor Summary - Commercial

- **Program Description:**
 - The program will educate business owners about the cost of energy and the value of efficiency, connect owners to commercial sector EE programs, and support applications for low or no-cost financing for EE measures
- **Program Rationale:**
 - **Market Barriers Addressed:** Lack of awareness of SoCalREN commercial sector programs, confusion regarding EE program eligibility, limited staff time to participate in EE, lack of knowledge of current and future energy cost impacts on business, lack of awareness of financing products and benefits of loans, limited upfront capital, and the cost of capital for conventional debt financing
 - **How is this program complementary and/or filling a gap?** IOUs tend to target resources on businesses that are the largest energy users. Medium and small businesses often do not receive the customized interventions needed to help them become aware of current and future energy costs, understand the business value of energy savings, and access low-interest financing products.

Small & Medium Business Energy Advisor Summary - Commercial

- **Target Market:** Small and medium businesses operating in SoCalREN territory. Small and medium businesses are defined as having annual non-coincident peak demand of less than 20kW and less than 200kW respectively.
- **Program Interventions:**
 - Outreach and business engagement
 - Financial analysis, recommendations and referrals
 - Financing application support and submission
 - Project management support
 - Stakeholder coordination
 - Registration/enrollment
- **What does SoCalREN aim to accomplish through this program?**
 - Improve awareness and understanding among small and medium business owners of the relationships between energy use, energy costs, and business operations and financial goals
 - Increase access to capital resources for energy projects for small and medium businesses
 - Reduce barriers to EE program participation by providing a single point of contact to manage and coordinate delivery of SoCalREN Commercial Program services

Small & Medium Business Energy Advisor Summary - Commercial

- How does program satisfy REN criteria?

REN Criteria	Small Commercial Direct Install Program
Fill gaps by conducting activities that the IOUs cannot or do not intend to undertake.	The IOUs are not serving this target customer group with targeted measure solutions.
Serve hard-to-reach (HTR) markets by conducting activities in hard-to-reach markets, whether or not there is a current IOU program that may overlap.	This program targets and serves HTR business customers.

Small & Medium Business Energy Advisor – Targets and Metrics

Metric	2024	2025	2026	2027	Total
# of businesses successfully referred to commercial sector programs	82	140	225	275	722
# of projects receiving project management support	163	280	450	550	1443
# of businesses receiving financial planning services	30	45	55	70	200
# of project financial analyses performed	15	22	28	35	100
# of loan applications submitted and approved	14	20	25	31	90
# of loans accepted	12	17	22	30	81
Loan amount disbursed (\$)	\$30,000	\$42,500	\$55,000	\$75,000	\$202,500
# of appliances purchased and installed	12	17	22	30	81
# of loans fully repaid	10	17	22	30	79

Cross-Cutting: Codes & Standards



Cross-cutting Codes & Standards Summary

- **Why is SoCalREN offering this sector?**
 - Local governments and other parties involved in C&S need help navigating the rapidly advancing landscape of policies, programs, and resources available to help them to meet and exceed state mandates and achieve decarbonized zero net energy (ZNE) buildings and communities. This program can help prepare local governments and the C&S community for quickly approaching EE, ZNE, and electrification mandates.
- **What are the gaps that SoCalREN will be filling?**
 - The SoCalREN approach will develop a comprehensive Compliance Enhancement Program template that addresses the entire compliance cycle, from building design to operation. This is something that is not covered by any existing IOU C&S programs. The Program will focus on systematic improvements along the entire permitting process spectrum, including innovative information channels and permit staff training resources to build capacity and competency.

Codes & Standards Strategies and Outcomes

Main Sector Strategies:

- Assist in developing and adopting Advanced Energy Codes and support local implementation strategies
- Provide tools, templates, and assistance to streamline permitting processes and improve compliance
- Use innovative information channels and training strategies to build permitting agency staff capacity and competency
- Develop tools and templates to support trade allies and their supply chains to promote and accelerate building electrification
- Collaborate with the administrators of benchmarking and energy performance rating tools and software

Main Sector Outcomes:

- Better energy code compliance, reduced energy use in buildings, and progress toward the state's energy efficiency and GHG reduction goals
- Adoption of advanced energy codes, standards, and policies that improve building energy performance and promote decarbonized and ZNE construction practices
- Collection and use of C&S data to inform better energy code compliance and the adoption/implementation of model energy codes, standards, and policies

Codes & Standards Program List

Program Name	New or Existing Program	Segment
Codes and Standards Program	New	n/a

Codes and Standards Program Summary - C&S

- **Program Description:**

SoCalREN will design and implement Codes and Standards (C&S) interventions within a framework for creating decarbonized zero net energy (ZNE) communities. SoCalREN seeks to accelerate local government leadership in energy efficiency, ZNE, and GHG goals through their regulatory authority over construction and land use.

- **Program Interventions:**

- Help local governments significantly improve energy code compliance in new construction and major remodels
- Assist local governments in the development, adoption, and implementation of model codes, standards, and policies that improve energy efficiency and reduce the carbon footprint of new and existing buildings
- Provide local governments with tools and training to analyze impacts from code compliance and code-development interventions through access to robust and actionable data

Codes and Standards Program – Targets and Metrics

Metric	2024	2025	2026	2027	Total
# of jurisdictions receiving C&S services and assistance	7	15	20	30	72
% of increased code compliance and permit closeout in participating jurisdictions	15%	15%	15%	15%	15%
# of local governments adopting advanced energy codes, standard, or policies	3	15	25	35	78
# of local governments using SoCalREN data evaluation tools & assistance to enhance C&S activities and policies	2	4	6	8	20

Residential



Residential Summary

- SoCalREN has supported the residential sector since its inception
- Rationale for SoCalREN Residential sector:
 - SoCalREN territory is home to more than 20 million residential customers living in nearly 7.5 million housing units. More than 30% of these housing units are in multifamily properties with over 50% located in a DAC or considered HTR
 - SoCalREN programs are designed to address this underserved market with a particular focus on Normally Occurring Affordable Housing (NOAH), DACs and rural/HTR customers.
- Since 2013, SoCalREN has:
 - Retrofitted more than 200 multifamily properties impacting nearly 45,000 tenant units
 - Reduced customer energy usage by more than 25 GWh and 1 million therms
 - Saved customers over \$20M through lower energy bills
 - Reduced GHG emissions by more than 24,000 metric tons of CO₂

Residential Program List

Program Name	New or Existing Program	Segment
Whole Building Comprehensive Energy Efficiency Multifamily	Existing	Resource Acquisition
Kits4Kids	Existing	Resource Acquisition
Small HTR Multifamily Direct Install	New	Resource Acquisition

Whole Building Comprehensive EE Multifamily

- Turnkey solution that provides technical and financial services for multifamily properties over 50 units to help improve the efficiency and living conditions through comprehensive energy retrofit projects.
- Previous Program Accomplishments:
 - 224 property retrofits since inception; 43% in DACs
 - 66 properties in 2021; 55% in DACs
 - 25.8 GWh (gross) since inception; 1.1 million therms (gross)
 - 4 GWh (net) and 180,000 therms (net) in 2021

Whole Building Comprehensive – Barriers and Tactics

Market Barriers ¹	Program Tactics	Best Practices ²
<ul style="list-style-type: none"> • Lack of capacity • Multiple decision makers • Market confusion and high transaction costs 	<ul style="list-style-type: none"> • Targeted marketing and outreach • Active engagement with industry trade associations • Single point of contact to support property owners • Trade ally partnerships 	Consult and target building owners and managers
<ul style="list-style-type: none"> • Split incentives • Timing and disruption of tenants • Market confusion and high transaction costs 	<ul style="list-style-type: none"> • Menu of in-unit measures provided to tenants at no cost • NMEC pathway that integrates behavioral elements to engage tenants • Tenant education targeted 	Integrate direct installation and rebate programs
<ul style="list-style-type: none"> • Split incentives • Lack of capital • Lack of capacity • Market confusion and high transaction costs 	<ul style="list-style-type: none"> • Single point of contact to support property owners • Technical and project management support • Menu of in-unit measures provided to tenants at no cost 	Streamline rebates and incentivize in-unit measures
<ul style="list-style-type: none"> • Split incentives • Lack of capital • Uncertain benefits 	<ul style="list-style-type: none"> • Site assessments that identify cost-effective retrofit measures • Incentives based on savings achieved greater energy savings • NMEC pathway to encourage deeper savings 	Encourage deeper retrofits by providing escalating incentives
<ul style="list-style-type: none"> • Split Incentives • Lack of capital • Timing and disruption of tenants • Multiple decision makers 	<ul style="list-style-type: none"> • Whole building pathway for comprehensive projects • Common area pathway for single end-use replacement • NMEC pathway to maximize savings potential • Menu of in-unit measures provided to tenants at no cost 	Offer multiple pathways for participation

¹ Apartment Hunters: Programs Searching for Energy Savings in Multifamily Buildings, ACEEE, December 2013

² An Overview of Affordable Multifamily Programs: Best Practices and Context for Utilities, ACEEE, September 2021

Whole Building Comprehensive Multifamily – Targets and Metrics

Metric	2024	2025	2026	2027	Total
Net GWh	3.258	3.885	3.911	7.047	18.102
Net kW	238	283	285	567	1,373
Net Therms	183,394	218,740	220,158	302,202	924,494
TRC	0.49	0.56	0.59	0.74	
% DAC	50%	55%	60%	65%	60%
# of Projects	82	95	102	161	439
Participating Contractors	15	18	19	30	30

Kits4Kids

- Provide families considered HTR or located in DAC with a home-based educational activity. The activity is designed to help the student make connections between concepts learned through fourth grade science class and how the members of their household use energy at home, in a fun, hands-on fashion. Free, self-install measures and program materials help households save energy and money and educate household members about energy efficiency and the positive financial and environmental impacts associated with participating and committing to EE behaviors.
- Previous Program Accomplishments:
 - Program launched in 2021 and enrolled 250 classrooms, meeting program goals

Kits4Kids – Barriers and Tactics

- Households in the targeted areas have a historic lack of participation in energy efficiency programs and may be unaware of the availability of such programs.
 - **Providing a no-cost entry point to energy efficiency that is accessible to all members of the household helps address this critical market barrier.**
- For Multifamily customers, property owners and managers may be hesitant to perform upgrades or installations in tenant units due to the spread of COVID-19.
 - **Kits4Kids provides measures directly to tenant households, allowing them to enjoy the benefits of energy efficiency without the risk of coming into contact with a contractor or service provider.**
- Due to high unemployment and increased energy costs, many households in the DAC and HTR areas served by SoCalREN currently face economic hardship.
 - **Measures and incentives provided can help alleviate financial burdens while providing information and guidance on how households can continue to save even more energy and money on an ongoing basis by implementing additional no-cost/low-cost strategies.**

Kits4Kids – Targets and Metrics

Metric	2024	2025	2026	2027	Total
Net GWh	1.209	1.345	1.673	1.822	6.048
Net kW	15.84	17.62	21.92	23.87	79.25
Net Therms	51,645	57,447	71,481	77,832	258,404
TRC	0.40	0.44	0.47	0.49	
# of Classrooms	250	265	330	360	1,205

Small HTR Multifamily DI

- Provides turnkey installation of energy efficiency measures that will reduce electric, natural gas and water consumption of small apartment buildings with less than 50 units that are classified as Hard to Reach or are located within Disadvantaged Communities. The measures will be applicable to both tenant units and common areas, thereby reducing energy costs for both owners and tenants.
- Most EE programs primarily focused on large multifamily properties
 - Generally owned by a corporation or real estate investment trust
 - Incentives help defray a portion of the cost to refresh the property or address deferred maintenance needs
 - EE Projects oftentimes used to manage cash flow through use of subsidized, lower interest rate financing available for energy efficient properties
- Market dynamic within the smaller, independently owned buildings is different
 - Small property owners are not as well capitalized as corporate property owners
 - They lack the same financial and tax advantages
 - Do not have the same level of expertise to manage complex energy efficiency retrofits
 - Require a more turnkey approach with little to no cash outlay making direct install the best option for market success and filling a much needed gap in the market.

Small HTR Multifamily DI – Barriers and Tactics

Market Barriers ¹	Program Tactics	Best Practices ²
<ul style="list-style-type: none"> • Lack of capacity • Multiple decision makers • Market confusion and high transaction costs 	<ul style="list-style-type: none"> • Targeted marketing and outreach • Active engagement with local government partners and CBOs • Program subcontractors that complete installation of EE measures • In-language program outreach to address language barriers 	Consult and target building owners and managers
<ul style="list-style-type: none"> • Market confusion and high transaction costs • Lack of capacity 	<ul style="list-style-type: none"> • Assigned program representatives based on region • Direct install measures managed through subcontractors 	Provide a one-stop shop for program services
<ul style="list-style-type: none"> • Split incentives • Timing and disruption of tenants • Market confusion and high transaction costs 	<ul style="list-style-type: none"> • Direct install measures managed through subcontractors • Marketing and education targeted to building owners and tenants 	Integrate direct installation and rebate programs
<ul style="list-style-type: none"> • Split incentives • Lack of capital • Lack of capacity • Market confusion and high transaction costs • Uncertainty about energy savings and other non-energy benefits 	<ul style="list-style-type: none"> • Showcase projects to demonstrate “real life” example • Case studies that summarize project opportunities • Proposed EE solutions based on property needs • Direct install measures managed through subcontractors 	Streamline rebates and incentivize in-unit measures
<ul style="list-style-type: none"> • Split Incentives • Lack of capital • Timing and disruption of tenants • Multiple decision makers 	<ul style="list-style-type: none"> • Targeted marketing leveraging various data sources • In-language support to address language barriers • No cost direct install of common area and tenant measures 	Serve both low-income and market-rate multifamily households
<ul style="list-style-type: none"> • Market confusion and high transaction costs • Timing and disruption of tenants • Multiple decision makers 	<ul style="list-style-type: none"> • Comprehensive measure list that addresses electric, gas and water usage • Referral of income-qualified customers to ESA programs 	Coordinate programs across electric, gas and water utilities

¹ Apartment Hunters: Programs Searching for Energy Savings in Multifamily Buildings, ACEEE, December 2013

² An Overview of Affordable Multifamily Programs: Best Practices and Context for Utilities, ACEEE, September 2021

Small HTR Multifamily DI – REN Criteria

REN Criteria	Small HTR Multifamily Direct Install
<p>Fill gaps by conducting activities that the IOUs cannot or do not intend to undertake.</p>	<p>Smaller properties with less than 50 residential units account for approximately 80 percent of the total multifamily properties in the SoCalREN region and are currently not addressed by IOU programs. This is largely due to the high cost to serve as necessitated by the level of support required to stimulate participation among this customer class and the low per project energy savings available from these smaller properties.</p>
<p>Serve hard-to-reach (HTR) markets by conducting activities in hard-to-reach markets, whether or not there is a current IOU program that may overlap.</p>	<p>This program targets and serves HTR customers.</p>
<p>Pilot innovative solutions by conducting activities where there is no current IOU program offering, and where there is potential for scalability to a broader geographic reach, if successful.</p>	<p>The program offers an innovative approach to marketing and outreach by developing up to three Energy Showcase projects that will be used to showcase best practices and new technologies applicable to smaller multifamily buildings. These sites will be serve as ambassador sites for owners of small properties to interact with and see in a “real world” scenario thus mitigating a common market barrier of performance uncertainty.</p>

Small HTR Multifamily DI – Targets and Metrics

Metric	2024	2025	2026	2027	Total
Net GWh	0.805	1.028	1.200	1.394	4.426
Net kW	291	372	437	502	1,602
Net Therms	42,981	54,921	64,565	73,933	236,400
TRC	0.30	0.33	0.35	0.38	
# of Projects	117	150	174	203	644
# of Tenant Units	2,926	3,739	4,362	5,067	16,095
% Savings above baseline	3%	4%	5%	8%	

Agriculture Sector





Agriculture Summary

- **Why is SoCalREN offering this sector?**

- Agriculture sector has been historically underserved
- As a result of D.21-05-031 and Avoided Cost Calculator updates, it will be increasingly challenging for non-RENs to serve underserved Ag customers
- Recent SCE Ag Summary:

Year	Actual TRC	Actual SCE Expenditures	SCE Business Plan Expenditures	Gap in spending
2019	0.34	\$2,330,112	\$3,181,000	(\$850,888)
2020	0.26	\$1,876,806	\$3,245,000	(\$1,368,194)
2021	0.35	\$747,238	\$3,180,000	(\$2,432,762)

- **Gaps that SoCalREN Ag will be filling:**

- Prioritize serving small and medium underserved Ag customers
- Provide hands-on project delivery support
- Offer EE measures that non-RENs cannot offer due to TRC limitations



Agriculture Strategies and Outcomes

- SoCalREN Ag Strategies:
 - 1) Prioritize program resources to historically underserved Ag customers
 - 2) Provide holistic approach to EE adoption for the Ag Sector
 - 3) Reduce the EE upgrade cost burden for underserved Ag customers
- SoCalREN Ag Outcomes:
 - 1) Leverage relationships with public sector customers (e.g. irrigation districts, rural water agencies and local governments) to build a stronger extended agricultural energy community
 - 2) Improve educational, technical, and capital access to the underserved Ag communities
 - 3) Facilitate substantial energy and water savings

Ag Project Delivery Program

Program Description: Similar to the SoCalREN's Public PDP program, the Ag PDP will provide technical and project management services to help underserved Ag customers implement EE strategies.

Why this program is needed:

- Ag customers typically lack resources and in-house energy efficiency expertise
- Build awareness on the importance of increased **EE adoption**
- Build EE expertise and knowledge to the Ag community in addition leverage SoCalREN Ag WE&T program to enroll contractors into Ag PDP program
- Develop established relationships with the Ag community by leveraging SoCalREN Public Sector relationships

How does program satisfy REN criteria?

- Program will serve hard-to-reach markets
- Project delivery services will not be offered through other PA's



Ag Project Delivery Program

Program Interventions:

- Support Ag customers throughout EE project lifecycle
- Provide comprehensive and customized project management and technical engineering services
- Address project challenges and proactively identify solutions

Metric	2024-2027 Total
Channeled Savings	<ul style="list-style-type: none"> • GWh: 61.3 • MW: 6.0 • Therms: 339,000
# of customers enrolled	160
# of projects completed	800



Agriculture Retrofit

The Ag-Retrofit program will coordinate with the Ag-PDP to assist underserved Ag customers implement custom retrofit solutions.

Why is this program needed?

- Serve Ag customers who will continue to be underserved
- Address stranded energy and water savings left by non-REN PAs
- Streamline and simplify the custom incentive process for historically non-participating customers

How does program satisfy REN criteria?

- Program will serve hard-to-reach markets



Agriculture Retrofit

Program Interventions:

- Provide customized EE solutions for each Ag customer
- Offer EE solutions that cannot typically be offered by non-REN PAs due to low TRC
- Connect local vendors and contractors to underserved customers
- Sample measure list: Booster Pump Overhaul, Booster Pump VSD Well Pump Overhaul, Well Pump VSD, Barn ventilation, greenhouse air distribution, etc.

Metric	2024-2027 Total
Energy Savings Achieved	<ul style="list-style-type: none"> • GWh: 56 • MW: 59.0
Total System Benefit	\$ 24,839,105
TRC	0.82
% of energy savings in DAC + HTR communities	60%



Rural-HTR Ag Direct Install - Equity

The Ag-DI program will coordinate with the Ag-PDP to assist rural and HTR Ag customers implement direct install solutions.

Why this program is needed:

- Rural HTR Ag customers will continue to be underserved
- Streamline and expand access to EE adoption and benefits
- Simple approach for Ag customers to build EE knowledge
- Lack of funding barrier will be overcome by DI approach

How does program satisfy REN criteria?

- Program will serve hard-to-reach markets



Ag Direct Install

Program Interventions:

- Provide simple and no-cost EE solutions
- Connect local vendors and contractors to underserved customers
- Sample measure list: Outdoor Lighting, Indoor Lighting, Booster Pump Overhaul, Well Pump Overhaul, Greenhouses and Indoor Ag Heating, etc.

Metric	2024-2027 Total
Energy Savings	<ul style="list-style-type: none"> • GWh: 4.5 • MW: 0.8 • Therms: 339,975
Total System Benefit	\$ 4,262,990
TRC	0.38
% of energy savings in DAC + HTR communities	60%

Cross-Cutting: Workforce Education and Training (WE&T)





Workforce Education & Training Summary

- Why is SoCalREN offering this sector?
 - Strengthen the number and diversity of skilled workers and contractors at all levels of the DSM and EE industry with special focus on the meeting the CPUC's foci on supplier diversity and on workforce education and training of disadvantaged communities, leveraging federal and local government resources to establish a comprehensive regional energy efficiency training and employment infrastructure.
- What are the gaps that SoCalREN will be filling?
 - WE&T will target DAC/HTR participants to create labor pipeline to meet supply and demand
- SoCalREN WE&T Accomplishments to-date
 - Over 440 contractors trained
 - Over 600 students enrolled in educational trainings
 - Over 190 paid internships awarded

WE&T Program List



Program Name	New or Existing Program	Segment
ACES	Existing	Equity
Green Path Careers	Existing	Equity
WE&T HUB	New	Market Support
E-Contractor Academy	Existing	Market Support
WE&T Agriculture	New	Equity



E-Contractor Academy Training Program

Program Description: Established to assist SMWDVBE contractors entering into the EE sector by providing access to resources, quality training, one on one assistance including: access to capital, bonding and insurance and procurement assistance, Fundamentals of Green Building. Contractors go through a comprehensive curriculum for emerging contractors in the EE space.

- **Market Barriers Addressed:**

Barrier	Solution
Lack of small, minority contractors with green building knowledge and skills	Host workshops to increase MWDVBEs basic information and knowledge
Access to Capital, bonding and insurance	One-on-One technical assistance and workshops to increase contractors' access to capital, bonding and insurance.
Access to green building technologies and equipment/materials	Participants will receive training options, certificated programs, access to construction technologies, and equipment/materials.
Challenging public procurement policies and requirements	One-on-One technical assistance and RFP development



E-Contractor Academy – Program Interventions

Preparing small and diverse contractors to compete for and perform energy efficiency projects throughout Southern California. Contractors enrolled benefit from the support and guidance offered by technical assistance managers and industry experts. Offering quality training to contractors to achieve more local and diverse participation in public sector, investor-owned utilities, and private project opportunities.

Contractors undergo training through a curriculum designed to achieve maximum outcomes and preparation. Curriculum includes:

- Bonding and Insurance
- Access to Capital
- Project Labor Agreements and Joint Venture
- GPRO Certification Training
 - Fundamentals of Building Green

In addition, new curriculum is being developed.

E-Contractor Training Program – Targets and Metrics



Metric	2024	2025	2026	2027	Total
# trained; # mentored	100 participants trained	100 participants trained	100 participants trained	100 participants trained	400 participants trained
# receive new certifications as a result of SoCalREN support. These are "agency" certifications based on ownership structure. For example, contractors have to prepare financial docs for DVBE certification.	25 participants receive new certifications	100 participants received new certifications			

E-Contractor Training Program – Targets and Metrics



Targets

- Conduct quarterly "Doing Business with REN" workshops to increase MWDBEs basic information about CPUC & SoCalREN & IOU EE programs
- Conduct bi-annual 7-8 week training series on green building technologies, marketing, public procurement processes and utility rebate programs for multi-family & public sector programs
- Provide 10 hours of coaching and assistance to acquire public and private sector EE projects
- Conduct bi-annual partnership meetings and contractor network events
- Conduct Bi-annual public sector workshops and technical assistance to enhance supplier diversity/procurement systems



ACES Pathway Program

- Program Description: The Architecture Construction Engineering Students (ACES) Pathway Program, a career and experiential learning program is currently operating in various traditional high schools that serve severely disadvantaged youth. The goal of ACES is to expose and create pipeline to EE ACE careers by capitalizing on public works investment, community college STEM course offerings and strong industry participation.
- Market Barriers Addressed:

Barrier	Solution
Accessibility for youth of color to high road ACE careers	Outreach/recruitment will be done each semester in coordination with the high schools and community colleges.
Local hiring standards for DAC/HTR professional workers	
Limited entry-level ACE opportunities	Maintain strong employer relationships and seek out new prospective employers each year. Offer paid industry accepted certificate training every summer.
Accessibility to technology	Participants enrolled in the program will have the opportunity to borrow a laptop and access to hotspots in order to complete skills certification training.
Transportation	Participants will receive bus pass or gas reimbursement to travel to and from training site.
Clothing	Participant will receive clothing stipend for training/work site attire.



ACES – Program Interventions

- The ACES Program aims to increase the diversity of students who pursue academic pathways in sustainability design and construction disciplines and develop mentoring between industry professionals and students.
- The ACES Program creates academic pathways, regardless of the participants' GPAs and socio-economic challenges, by employing a collaborative, proactive case management approach that engages high school principals and teachers, community college faculty members and administrators, and charter school executive directors.
- ACES participants also earn community college course credits that are transferable to the California State University and University of California systems, as well as industry recognized Skill Certificates (Programming Certification, Engineering Graphics Certification, and Sustaining Energy Certification). Participants have the opportunity for paid summer internships and to gain hands-on work experience alongside industry professionals, and during COVID a new online certification partnership was developed through GoEngineer. Participants had the alternate option to participate in the SOLIDWORKS Certified Associate (CSWA) and the SOLIDWORKS Certified Professional (CSWP) training, which has not been offered to high school students in the past.



ACES Pathway Program– Targets and Metrics

Metric	2024	2025	2026	2027	Total
# of internships awarded	50	50	50	50	200
# receiving skill certificates by type of certificate	25	35	45	60	165

Targets

- Institutionalize EE curricula for certification and training resources
- Develop with Community College, industry recognized certifications and curriculum
- Develop partnerships for resources and access to supportive services
- Implement the Summer Paid Internship Program for 50 youth to perform in ACE careers
- Conduct 1 training session per school/semester



Green Path Careers Program

Prepare opportunity youth and adults by providing EE skilled training in order to acquire the skills and knowledge necessary to succeed in the high growth EE industry. The GPC program aims to widen the pool of eligible DAC/HTR participants by also including the returning citizens population in the workforce. The opportunity youth and adult population would help to create a pipeline in filling the demand for the skilled labor shortage in EE.

- **Market Barriers Addressed:**

Barrier	Solution
Access to Technology	Participants enrolled in the program will receive a laptop and access to hotspots in order to complete online certification training. Participants will also have access to a computer lab via one of our partners.
Transportation	Participants will receive a bus pass or gas reimbursement to travel to and from the training site.
Clothing	Participants will receive a clothing stipend for training/worksite attire.



Green Path Careers – Program Interventions

- The program is designed to address the barriers opportunity youth and adults face when moving into the growing workforce, while addressing the EE workforce expansion needs. GPC aims to assist opportunity youth and adults by eliminating the barriers of the EE workforce sector, by providing certification training, supportive services, and the coaching needed to emerge successful by providing the resources and support needed to begin their EE career.
- The EE pathway of training offered to participants includes BPI Building Analyst, Building Analyst Multifamily, and Infiltration and Duct Leakage Certification Training, where participants would be prepared to perform residential energy audits. Providing an industry-recognized certification and credential will help participants progress into successful careers in the EE workforce.

Green Path Careers Program – Targets and Metrics



Metric	2024	2025	2026	2027	Total
# job placements	20	30	40	50	140
# receiving certificate	25	35	45	60	165

Targets

- Partnership development & WE&T eco-system alignment & support
- On-going market/outreach/Intake & Assessments of DAC residents
- Conduct bi-annual training programs in industry-approved certifications
- Coaching/mentoring, supportive services and guidance
- Implement paid work experience for 40 youth to perform in EE careers

WE&T HUB



- Program Description: Helps ensure local small-minority firms and disadvantaged workers in SCR region can effectively compete in the EE construction industry; to strengthen their knowledge, skills, and networks in the green building and clean energy sectors by creating a marketplace for employers/employees and serving as an opportunities clearinghouse.

- Program Rationale:

- Market Barriers Addressed:

- How is this program complimentary and/or filling a gap?

- The WE&T HUB aims to target DAC/HTR participants in order to Strengthen the gap of participation in these communities.

- Target Market: The program targets HTR and DAC in the Southern California Region in the quest to reducing the labor shortage in EE, RE and construction fields. The program will offer multi-level training and services that will lead a career pipeline in the Energy Efficiency sector. The program will be offered in collaboration with members of the WE&T Advisory Committee.

Barrier	Solution
Support Services	Participants enrolled in the program will receive access to support services from partners such as technology, transportation, or clothing.
Access to Capital, bonding and Insurance	Participants enrolled in the program will receive help with capital, bonding and insurance. The program goal is to partner with banks, CDFIs, and other associations to assist with the barrier.
EE/RE Outreach to DAC	Participants enrolled in the program will be informed through outreach measures set in place.
Lack of Peer Exchange	The development of a shared online platform/brokerage system for skilled workers and contractors to identify jobs and contracting opportunities.
Lack of EE Information	Participants in the program will receive ongoing training in new building codes, construction materials and equipment, project management software and estimating technologies, labor standards, construction administration, and project delivery methods (for example, P3s).
Fragmented workforce ecosystem	ECC entered into partnership alliance agreements with industry, community, and institutional partners to collectively address barriers to entry and growth and define strategies to maximize economic opportunities for communities of color.

WE&T HUB – Program Interventions



- Program Interventions:
 - What does SCR aim to achieve/accomplish through this program?
 - SoCalREN, proposes a multi-phased strategy to organize the infrastructure needed to connect SoCalREN’s minority contractors and disadvantaged workers to capacity-building resources and opportunities.
 - The WE&T Opportunity Hub will be customized and developed as a specialized ecosystem of the energy efficiency sector with the following objectives in mind:
 - Increase the demand for and utilization of SoCalREN’s high road contractors and disadvantaged workers from underrepresented communities by the private/public sector in energy efficiency and clean energy projects; and
 - Expand the number and capacity of SoCalREN’s high-road contractors and workers from underrepresented communities to compete for and undertake clean energy careers and energy efficiency projects.



WE&T HUB– Targets and Metrics

Metric	2024	2025	2026	2027	Total
# of community awareness workshops	2	2	2	2	8
# of regional partnerships for Workforce Alliance	12	12	12	14	50

Targets

- Organize and convene monthly meetings of industry stakeholders (employers, WE&T orgs and CBOs)
- Design a regional collaborative strategy to deploy WE&T and resources, as well as hiring and business networks for disadvantaged workers and business
- Conduct 2 community EE awareness and information workshops
- Provide Short-term training in EE for DAC residents and businesses
- Provide coaching/Mentoring to provide technical assistance and guidance to students and businesses



Agriculture WE&T

The Ag-WE&T program will develop a local skilled workforce that delivers high quality Agricultural EE services to the SoCalREN region. The trained workforce will accelerate energy savings through SoCalREN's Rural HTR Ag DI and Ag-Retrofit programs.

Why is this program needed?

- Create a skilled local workforce through underserved communities to achieve energy and water savings.
- Regional energy management training will ensure high quality installation of EE measures.
- Create energy career pathways that will facilitate clean energy communities.

How does program satisfy REN criteria?

- Program offerings will not be offered by other PAs



Agriculture WE&T

Program Interventions:

- Marketing and outreach events to promote clean energy job opportunities
- Conduct trainings that lead to attractive energy career paths
- Coordinate with Agriculture Sector and Ag-Finance offerings to enable market transformation

Metric	2024-2027 Targets
# of marketing and outreach events	20
# trained contractors	120
% of participants from underserved communities	60%

Cross-Cutting: Finance Sector



Public Agency Revolving Loan Fund Summary

- **Program Description:** The RLF Program is a financing cross-cutting program that offers loans that accelerate energy project implementation. The Program supports energy upgrades to buildings and facilities owned by public agencies located within underserved communities. Loans provide upfront construction financing for approved but not-yet-budgeted projects that would otherwise be delayed pending budget allocation. The program fund will leverage \$2.2 million in seed capital, provided through the County of Los Angeles (the program administrator of the SoCalREN), using American Reinvestment and Recovery Act (ARRA) funds already granted by the California Energy Commission (CEC) and no utility ratepayer funds will be utilized for the loans.
- **Market Barriers Addressed:** The RLF Program is designed to help underserved communities overcome barriers to accessing upfront capital needed to fund energy efficiency projects, accessing funding to cover full project costs, or complete lack of access to capital for energy projects.

Public Agency Revolving Loan Fund Summary - Finance

- **Program Interventions: Downstream Strategy - Finance**
 - Loan application development support
 - Loan application review and approval
 - Upfront construction financing delivered to agencies through disbursement of loan funds
- **Previous Program Accomplishments:**
 - Participants accessed additional capital because SoCalREN leveraged non-CPUC funds of \$2.2M for investment into SoCalREN communities
 - **\$2 million in funding disbursed** to public agency participants for EE projects
 - **\$1.1 million in additional pipeline** identified to leverage funds once replenished
 - **309,000 kWh & 749 therm** savings supported

Public Agency Revolving Loan Fund – Targets and Metrics

Metric	2024	2025	2026	2027	Total
Number of touch points where RLF is presented	15	15	15	15	60
Number of Project Proposals delivered	10	10	10	10	40
Number of RSF loan applications	3	3	3	3	12
Number of agency-approved loans	3	3	3	3	12
Number of RSF Program loans awarded, dollar amount issued and energy savings attributed to the project	\$1 million	\$1 million	\$1 million	\$1 million	\$4 million

Rural HTR Ag Finance Summary

The Rural HTR Ag Finance program will serve as a bridge funding for rural and HTR Ag customers until other financing sources are available to complete EE projects. The Ag Finance program will support the adoption of EE measures through SoCalREN's Ag offerings.

- **Why is this program needed?**
 - Rural HTR Ag communities typically lack upfront capital to implement EE measures
 - Upfront funding will support project construction costs
 - Program will accelerate project implementation and positive environmental impacts
- **How does program satisfy REN criteria?**
 - Program will serve hard-to-reach communities
 - Other PAs do not intend to offer an Agricultural-specific finance program

Rural-HTR Ag Finance

- **Program Interventions:**
 - Loan application development support
 - Loan application review and approval
 - Upfront financing through loan fund disbursement

- **Metrics and Targets**

Metric	2024-2027 Target
# of outreach activities	16
# of project proposals delivered	120
# of loan applications	100