



County of Los Angeles  
**INTERNAL SERVICES DEPARTMENT**

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Los Angeles, California 90063

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*"To enrich lives through effective and caring service"*

June 15, 2020

**Advice 11-E-G-A**

(Southern California Regional Energy Network ID #940)

**Advice 4232-E-A**

(Southern California Edison Company ID U 338-E)

**Advice 5645-G**

(Southern California Gas Company ID U 904 G)

Public Utilities Commission of the State of California

**Subject: SoCalREN, SCE, and SoCalGas' 2021 Joint Cooperation  
Memorandum Pursuant to Decision 18-05-041**

**Purpose**

Southern California Regional Energy Network (SoCalREN), on behalf of Southern California Edison Company (SCE), and Southern California Gas Company (SoCalGas),<sup>1</sup> hereby submits this Tier 2 Advice Letter (AL) pursuant to Decision (D.) 18-05-041, Ordering Paragraph (OP) 38.<sup>2</sup> This AL seeks approval from the California Public Utilities Commission (Commission) for the 2021 Joint Cooperation Memorandum submitted by SoCalREN, SCE and SoCalGas (2021 Joint PA JCM). The 2021 Joint PA JCM includes details regarding SoCalREN's programs, SoCalGas and SCE's comparable programs, and the coordination among the Program Administrators (PAs) on overlapping service territories.

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<sup>1</sup> Together referred to as the Joint Program Administrators (Joint PAs).

<sup>2</sup> D.18-05-041 at 190.

## **Background**

On June 5, 2018, the Commission issued D.18-05-041, *Decision Addressing Energy Efficiency Business Plans*, which adopted the eight PAs' business plans, sector strategies, and associated budgets for the years 2018 through 2025. In addition, D.18-05-041 requires the PAs to submit a Joint Cooperation Memorandum (JCM) between energy efficiency program administrators with overlapping service areas, or "joint cooperation memos." Specifically, the directive states:

We will require the PAs (RENs, IOUs and CCA) to develop a joint cooperation memo to demonstrate how they will avoid or minimize duplication for programs that address a common sector (e.g., residential or commercial) but pursue different activities, pilots that are intended to test new or different delivery models for scalability, and/or programs that otherwise exhibit a high likelihood of overlap or duplication and are not targeted at hard-to-reach customers. For such programs, each PA must explicitly identify and discuss how its activities are complementary and not duplicative of other PAs' planned activities. Staff will utilize these memos in their reviews of the PAs' ABALs, and may disapprove funding for specific activities or programs that do not conform with the memos, or more broadly with D.12-11-015 and D.16-08-019 (pg. 97).

SoCalREN hereby submits its 2021 annual JCM AL submittal on behalf of itself, SCE and SoCalGas.

## **Proposal**

Attachment A of this AL contains the Joint PAs' response to the Commission's directive. The JCM is divided into three sections. The first section describes an overview of the Joint PAs' portfolio coordination. The second section provides a summary of each of SoCalREN's 2021 program offerings, a summary of each comparable SCE/SoCalGas program and details regarding the program coordination between SoCalREN, SCE and SoCalGas. The third section provides details regarding SoCalREN's program compliance with D.12-11-015.

The Joint PAs make note that the budgets and programs outlined in this memo are the best estimates of 2021 offerings at the time of submittal and are not assumed to be approved. Programs and budgets will be reviewed and approved as part of the Annual Budget Advice Letter (ABAL).

In addition, this JCM includes several appendices to provide relevant information for Energy Division staff. Appendices included in the Joint PAs 2021 JCM are as follows:

- Appendix A: Summary of SoCalREN Programs Compliance with D.12-11-

- 015;
- Appendix B: SoCalREN Summary of Programs Offered For 2021;
  - Appendix C: SCE and SoCalGas Summary of Comparable Programs Offered for 2021;
  - Appendix D: SoCalREN-IOU (SCE and SoCalGas) Coordination Plan for Public Agencies.

## **Protests**

Anyone may protest this AL to the Commission. The protest must state the grounds upon which it is based, including such items as financial and service impact, and should be submitted expeditiously. The protest must be made in writing and must be received within 20 days of the date this AL, which is July 5, 2021. The address for mailing or delivering a protest to the Commission is given below:

California Public Utilities Commission  
CPUC Energy Division  
Attention: Tariff Unit  
505 Van Ness Avenue  
San Francisco, CA 94102

A copy of the protest should also be sent via e-mail to the attention of the Energy Division Tariff Unit ([EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)). Due to the COVID-19 pandemic and the shelter at home orders, SoCalGas is currently unable to receive protests or comments to this AL via U.S. mail or fax. Please submit protests or comments to this AL via e-mail to the addresses shown below on the same date they are mailed or e-mailed to the Commission.

### **For**

#### **SoCalREN:**

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And

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Managing Director, State Regulatory Affairs  
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**Effective Date**

Per D.18-05-041, OP 38, this AL is subject to Energy Division disposition and should be classified as Tier 2 (effective after staff approval) pursuant to General Order (GO) 96-B. The Joint PAs respectfully requests that this AL be made effective on July 15, 2020, which is 30 days from the date submitted.

**Notice**

A copy of this AL is being sent to the Commission's service lists for A.17-01-013 (et al.) and R.13-11-005. For changes to A.17-01-013 (et al.) and R.13-11-005 service lists, please contact the Commission's Process Office at 415-703-2021 or by electronic mail at [process\\_office@cpuc.ca.gov](mailto:process_office@cpuc.ca.gov).

Respectfully Submitted,

Minh Le<sup>3</sup>  
General Manager, Energy and Environmental  
Services

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<sup>3</sup> SoCalGas and SCE have authorized SoCalREN to sign and submit this AL on their behalf.

County of Los Angeles  
1100 N. Eastern Avenue  
Los Angeles, California 90063  
Phone: (323) 267-2006  
[MSLe@isd.LAcounty.gov](mailto:MSLe@isd.LAcounty.gov)

Attachment A: SoCalREN, SCE and SoCalGas Joint Cooperation Memo with  
Appendices

cc: Service Lists for A.17-01-013 et. al. and R.13-11-005

# CALIFORNIA PUBLIC UTILITIES COMMISSION

## ADVICE LETTER FILING SUMMARY ENERGY UTILITY

MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No. Southern California Regional Energy Network (#940)

Utility type:

ELC

GAS

PLC

HEAT

WATER

Contact Person: Minh Le

Phone #: (323) 267-2006

E-mail: MSLe@isd.lacounty.gov

EXPLANATION OF UTILITY TYPE

ELC = Electric

GAS = Gas

PLC = Pipeline

HEAT = Heat

WATER = Water

Tier:  1  2  3

Advice Letter (AL) #: 11-E-G-A, 4232-E-A, and 5645-G \_\_\_\_\_

Subject of AL: Supplement: SoCalREN, SCE, and SoCalGas' 2021 Joint Cooperation Memorandum Pursuant to Decision 18-05-041

Keywords (choose from CPUC listing): Energy Efficiency

AL filing type:  Monthly  Quarterly  Annual  One-Time  Other \_\_\_\_\_

If AL filed in compliance with a Commission order, indicate relevant Decision/Resolution #:  
D.18-05-041

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL N/A

Summarize differences between the AL and the prior withdrawn or rejected AL<sup>1</sup>: N/A

Resolution Required?  Yes  No

Requested effective date: 07/15/2021 No. of Tariff Sheets: N/A

Estimated system annual revenue effect (%): N/A Estimated

system average rate effect (%): N/A

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: N/A

Service affected and changes proposed<sup>1</sup>: Joint Cooperation Memo regarding overlapping Program Administrators Plans and details regarding energy efficiency programs coordination in compliance with D.18-05-041

Pending advice letters that revise the same tariff sheets: \_\_\_\_\_

**Protests and all other correspondence regarding this AL are due no later than 20 days after the date of this filing, unless otherwise authorized by the Commission, and shall be sent to:**

**CPUC, Energy Division**

**Attention: Tariff Unit**

**505 Van Ness Ave., 4<sup>th</sup> Flr.  
San Francisco, CA 94102**

**EDTariffUnit@cpuc.ca.gov**

**Utility Info (including e-mail)**

**Minh Le**

**Energy and Environmental Services General  
Manager**

**County of Los Angeles Office**

**1100 North Eastern Avenue**

**Los Angeles, CA 90063-3200**

**MSLe@isd.lacounty.gov**

<sup>1</sup> Discuss in AL if more space is needed.



# **Attachment A**

Southern California Regional Energy  
Network, Southern California Edison, and  
SoCalGas<sup>®</sup>

2021 Joint Cooperation Memo



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How will outreach and education related to SoCalREN be communicated to Public Agencies?.	
How will LGPs, Account Managers and other Program leads learn about SoCalREN?	

## **I. SUMMARY OF SOCALREN, SCE, AND SOCALGAS PORTFOLIO COORDINATION**

D.18-05-041 requires the PAs to submit a joint cooperation memorandum between EE PAs with overlapping service areas, or “joint cooperation memos.” Specifically, the directive states: “We will require the PAs (RENS, IOUs and CCA) to develop a joint cooperation memo to demonstrate how they will avoid or minimize duplication for programs that address a common sector (e.g., residential or commercial) but pursue different activities, pilots that are intended to test new or different delivery models for scalability, and/or programs that otherwise exhibit a high likelihood of overlap or duplication and are not targeted at hard-to-reach customers. For such programs, each PA must explicitly identify and discuss how its activities are complementary and not duplicative of other PAs’ planned activities.”

The SoCalREN, SCE, and SoCalGas’ (hereinafter referred to as the “Joint PAs”) 2021 portfolio will continue to focus on collaboration with respect to the Joint PAs’ overlapping programs. As part of the Joint PAs’ focused transition to performance-based and comparatively cost-effective and cost-efficient 2021 portfolios, the Joint PAs will be deepening collaboration amongst themselves to ensure that their respective overlapping regional programs do not result in unnecessary duplication or cause customer confusion. PAs can derive additional value by providing information and referrals to programs across all program implementers, including those outside each other’s implementation focus.

In addition, the Joint PAs will use 2021 to continue to conduct ongoing performance assessments, introduce program administrative and implementation adjustments to reduce costs and increase energy savings, and optimize performance of all their portfolios.

Details on how each of the Joint PAs’ overlapping sector programs will collaborate, as necessary to comply with the Commission’s directives, between each PA are provided below in the following section.

## **II. SUMMARY OF SOCALREN PORTFOLIO OF PROGRAMS OFFERED FOR 2021 AND COMPARABLE PARTNER IOU 2021 PROGRAMS**

### **A. RESIDENTIAL - SOCALREN MULTIFAMILY PROGRAM (SCR-RES-A1)**

The SoCalREN's Multifamily Program provides audit and improvement incentives to building owners for comprehensive EE upgrades to qualifying structures of at least four units. The SoCalREN Multifamily Program offers a tiered promotion strategy designed to stimulate multi-measure upgrades. The program was developed as a flexible turnkey solution, composed of technical assistance, advanced building audits, program implementation, and construction/installation incentives.

In addition, the SoCalREN Multifamily Program utilizes a collaborative approach that provides direct account management services to participating EE program improvement raters (raters). This includes regular communication through various channels (e.g., conference calls, emails), as well as intensive follow-up on stagnant jobs in the pipeline to encourage project completion and increase the attainment of deep retrofit energy savings. SoCalREN also utilizes a multi-industry profession project delivery approach that will not only include a "rater-model" but also a "turn-key contractor model" that leverages contractors who are offer "one-stop shop" services (e.g. audits, installation services, incentive support, etc.) thus ensuring many industry actors supporting project conversion and provide program support efficiencies.

A primary objective for all SoCalREN strategies is to meet the needs of underserved, hard-to-reach markets and disadvantaged communities. The SoCalREN crosscuts EE programs onto a number of pre-existing government frameworks specifically designed for underserved and Disadvantaged Communities (DAC), reducing administrative, developmental, and other costs. SoCalREN has structured its Multifamily Program strategies to be administratively cost-efficient with a focus on regional government capacities and systems already in-place to address the underserved multifamily market sub-segment, including multifamily properties within hard-to-reach and DAC markets.

#### **1. Summary of SoCalREN's Program Objectives**

- a) To cost-effectively improve the efficiency of multifamily buildings through custom comprehensive retrofits.
- b) Provide a turnkey solution with financial incentives so property owners can adopt new and more efficient technologies and/or equipment, thus reducing energy waste.
- c) Leverage cross-cutting companion SoCalREN programs to drive participation in EE upgrades (i.e., LLR, RCC).
- d) Meet a higher percentage of hard-to-reach and DAC multifamily properties.

**2. Summary of Program Differentiation**

The following table provides a summary of the PAs’ respective multifamily programs.

**Table 1: SoCalREN, SCE, and SoCalGas Multifamily Program Summary**

<b>Program Parameters</b>	<b>SoCalREN</b>	<b>SCE</b>	<b>SoCalGas</b>
<b>Target Audience(s)</b>	<ul style="list-style-type: none"> <li>• Multifamily property owners within SoCalREN Territory</li> <li>• HTR- Multifamily property owners - Primary language spoken is a language other than English</li> <li>• Multifamily property owners within DACs</li> </ul>	<ul style="list-style-type: none"> <li>• Property owners and managers of existing multifamily properties.</li> <li>• The program targets all levels of multifamily buildings (i.e., low-income, affordable-to-moderate income, market-rate), including those located in DACs.</li> </ul>	<ul style="list-style-type: none"> <li>• Property owners and managers within the SoCalGas territory who seek to make energy-efficient upgrades to their properties while making well-informed decisions regarding cost and investment for the future.</li> <li>• Low income, affordable-to-moderate income, and market rate are eligible to participate.</li> </ul>
<b>Program Delivery Approach</b>	<ul style="list-style-type: none"> <li>• Whole Building</li> </ul>	<ul style="list-style-type: none"> <li>• Measure</li> </ul>	<ul style="list-style-type: none"> <li>• Whole Building</li> </ul>
<b>Differentiating Programmatic Features</b>	<ul style="list-style-type: none"> <li>• 50% Incentive Cost-Cap</li> <li>• 75% Incentive Cost-Cap for DACs/HTR</li> <li>• +10 Tiered Incentive Structure</li> <li>• Utilizes a multi-industry project delivery approach</li> <li>• Offers Program with Partner Gas Muni’s</li> </ul>	<ul style="list-style-type: none"> <li>• SCE offers deemed incentives for a select EE measures</li> </ul>	<ul style="list-style-type: none"> <li>• Incentive capped at Total Project Cost.</li> <li>• Five incentive tiers available.</li> </ul>
<b>Resource or Non-Resource</b>	Resource	Resource	Resource

<b>Eligible Measures</b>	The program offers a variety of deemed incentives for energy-saving products and services for both common and dwelling areas of multifamily properties; end uses include: Appliances, HVAC, Lighting, Pumping, and Water Heating.	The program offers deemed incentives for energy-saving products for both common and dwelling areas of multifamily properties; end uses include: HVAC and Lighting.	Home Upgrade Program-Multifamily promotes long-term energy benefits through comprehensive EE retrofit measures - including building shell upgrades, high-efficiency HVAC units, central heating and cooling systems, central domestic hot water heating, and other deep energy reduction opportunities.
<b>Budget<sup>3</sup></b>	\$6,644,000	\$4,900,000	\$2,361,124

Similar to the SoCalGas Multifamily Whole Building Program that is currently offered to customers, SoCalREN’s multifamily projects must install at least three EE measures. However, SoCalREN’s Multifamily Program currently only offers a \$5,000 assessment incentive, which is paid in two installments to participating raters (\$2,500 when assessment is submitted and \$2,500 upon project completion), as opposed to the IOU programs, which pay 100% of the assessment incentive. In addition, SoCalREN’s Multifamily program includes a 50% total project incentive cost-cap for non-DAC/HTR (75% total project incentive cost-cap for DAC/HTR) multifamily properties. SoCalGas’s Multifamily Whole Building Program has an incentive cost-cap of the total project cost. SoCalREN utilizes a limited assessment incentive, an installment of payment approach and total project incentive cost-caps. SCE’s Multifamily Program utilizes a different approach, offering deemed incentives for energy-saving products for both common and dwelling areas of multifamily properties. There are no whole building requirements in SCE’s Multifamily Program.

Lastly, SoCalREN will include in its eligible measure list power strips for multifamily projects’ common areas. SoCalREN’s Multifamily Program is not a direct install program and does not offer “single-measure” rebates.

The following table compares the key program parameters of PAs’ multifamily programs.

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<sup>3</sup> The budgets provided herein are estimates. Final 2021 budgets will be provided in the PAs’ Annual Budget Advice Letters that will be filed on September 1, 2020

**Table 2: Multifamily Program Comparison**

<b>Program Parameters</b>	<b>SCR Multifamily Program</b>	<b>SCE Multifamily Program</b>	<b>SCG - under the HUP umbrella</b>
<b>Project Delivery Model</b>	<p>1. Raters must have 2 or more:</p> <ul style="list-style-type: none"> <li>- HERS II or RESNET Rater</li> <li>BPI Multifamily Building Analyst</li> <li>- GreenPoint Rater Existing Home Multifamily</li> <li>- BPI Building Analyst or other BPI-certified professional</li> </ul> <p>2. Turn-Key Contractor:</p> <ul style="list-style-type: none"> <li>1) Provides Ashrae 2 energy audit</li> <li>2) Provides</li> </ul>	Measures are implemented through contractors or customers may also choose to self-install or select contractor of choice for all incentivized measures.	All projects go through SoCalGas Consultant for review. Consultant provides technical and program assistance.
<b>Minimum Energy Savings Required per Project</b>	10%	n/a	5% (gas savings)
<b>Minimum Number of Measures</b>	3 measures	1 measure	3 measure minimum and must include a core measure (installation of a major capital improvement).
<b>Minimum Number of Dwelling Units</b>	3 units	2 or more units	3 units
<b>Deemed vs Calculated</b>	Calculated	Deemed	Measures are calculated using a combination of energy modeling results and ED approved workpapers or custom calculations. Energy models are calibrated when possible to historical energy use.
<b>Program Delivery Approach</b>	Whole Building	Measure	Whole Building



Program Parameters	SCR Multifamily Program	SCE Multifamily Program	SCG - under the HUP umbrella																																																												
<b>Total Incentive Project Cost-Cap</b>	50% non-DAC properties 75% DAC/HTR properties	None – Deemed Incentives	Total Project Cost																																																												
<b>Assessment Structure</b>	The program is currently offering an assessment payment of \$5,000 for assessments. \$2,500 paid when assessment is submitted and approved and \$2,500 paid when improvement is completed and approved. In 2019, assessment incentive increased and is only paid on project completion to ensure project conversion rate increases (similar to PG&E).	Deemed - No assessment needed.	SoCalGas Consultant and program SPOC provides assessment as well as technical assistance and recommendations to assist customer and or customer's contractor.																																																												
<b>Improvement Incentive Structure</b>	Program Tiered Incentive Structure: <table border="1" data-bbox="435 1035 735 1276"> <thead> <tr> <th>Energy Savings Achieved per site</th> <th>Incentive Per Dwelling Unit</th> <th>Energy Savings Achieved per site</th> <th>Incentive Per Dwelling Unit</th> </tr> </thead> <tbody> <tr><td>10%</td><td>\$550</td><td>21%</td><td>\$913</td></tr> <tr><td>11%</td><td>\$583</td><td>22%</td><td>\$946</td></tr> <tr><td>12%</td><td>\$616</td><td>23%</td><td>\$979</td></tr> <tr><td>13%</td><td>\$649</td><td>24%</td><td>\$1,012</td></tr> <tr><td>14%</td><td>\$682</td><td>25%</td><td>\$1,045</td></tr> <tr><td>15%</td><td>\$715</td><td>26%</td><td>\$1,078</td></tr> <tr><td>16%</td><td>\$748</td><td>27%</td><td>\$1,111</td></tr> <tr><td>17%</td><td>\$781</td><td>28%</td><td>\$1,144</td></tr> <tr><td>18%</td><td>\$814</td><td>29%</td><td>\$1,177</td></tr> <tr><td>19%</td><td>\$847</td><td>30%</td><td>\$1,200</td></tr> <tr><td>20%</td><td>\$880</td><td></td><td></td></tr> </tbody> </table>	Energy Savings Achieved per site	Incentive Per Dwelling Unit	Energy Savings Achieved per site	Incentive Per Dwelling Unit	10%	\$550	21%	\$913	11%	\$583	22%	\$946	12%	\$616	23%	\$979	13%	\$649	24%	\$1,012	14%	\$682	25%	\$1,045	15%	\$715	26%	\$1,078	16%	\$748	27%	\$1,111	17%	\$781	28%	\$1,144	18%	\$814	29%	\$1,177	19%	\$847	30%	\$1,200	20%	\$880			Deemed - Improvement based off available measure	Incentives are tiered based on percent improvement in site gas energy use, and multiplied times the number of units in the property. For example, at 5% improvement the incentive per unit is \$300, at 15% improvement the incentive is \$750. Total amount cannot exceed measure and installation cost. <table border="1" data-bbox="1084 1476 1385 1608"> <thead> <tr> <th>ENERGY SAVINGS ACHIEVED PER SITE*</th> <th>INCENTIVE PER DWELLING UNIT**</th> </tr> </thead> <tbody> <tr><td>5%</td><td>\$300</td></tr> <tr><td>7.5%</td><td>\$425</td></tr> <tr><td>10%</td><td>\$570</td></tr> <tr><td>12.5%</td><td>\$630</td></tr> <tr><td>15%</td><td>\$750</td></tr> </tbody> </table>	ENERGY SAVINGS ACHIEVED PER SITE*	INCENTIVE PER DWELLING UNIT**	5%	\$300	7.5%	\$425	10%	\$570	12.5%	\$630	15%	\$750
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Program Parameters	SCR Multifamily Program	SCE Multifamily Program	SCG - under the HUP umbrella
<b>CAS Testing Requirements</b>	CAS testing required; all critical issues to be fixed prior to submitting for payment of the Assessment and all other corrections must be completed prior to submissions of the improvement incentive so that corrections can be integrated into the scope of work.	None	Requires diagnostic “test-in” and “test-out” whole house assessments. The “test-in” assessments will generate a comprehensive work scope and the “test-out” assessments will be used to document that specified improvements have been properly sized and installed
<b>Documentation Required</b>	ASHRAE Level 2 assessment report, EnergyPro simulations files, building sketch, Multifamily CAS workbook documenting CAS results, job and building information, proposed scope of work.	Deemed incentive application form and purchase receipt(s).	Paid itemized sales receipt, contractor invoices, paid home improvement contracts, permit closure, product cut sheets, savings calculations workbook generated by consultant, and application forms (Investment Grade Energy Audit Request Form, Energy Audit Report, Energy Report with recommended improvements and cost).
<b>Project Measures Incentivized</b>	Gas/water/electric measures (please see eligible measure list) For 2021: the following measure will be added - [To Be Updated]	Lighting and HVAC technologies	All typical gas and electricity EE measures are eligible assuming savings can be modeled according to ED guidelines for whole building programs (EP5 simulation engine or outside calculations). No generation measures are eligible (solar thermal, solar PV). No fuel switching measures are eligible.

### **3. Comparable SoCalGas Program – Home Upgrade Program – SoCalGas Upgrade Program [SCG 3705]**

The SoCalGas Home Upgrade Program uses a holistic approach to identify and correct comfort and energy-related deficiencies in single family detached homes. Contractors employ building science principles and use sophisticated diagnostic equipment to detect the cause of home performance related problems, and quickly and accurately address them. Customers have two options to choose from in this program, Home Upgrade and Advanced Home Upgrade. These options allow the customer to choose from a variety of measures that best suit their home and needs. Some examples of measures used consist of attic insulation, air sealing, duct testing, HVAC change out, hot water heaters, pipe wrap, Showerstart thermostatic control valves, along with combustion safety testing. The incentives are designed to influence the implementation of comprehensive measures and therefore are based on energy reductions achieved. The more a customer saves energy, the higher the incentive they will receive.

As an extension of the existing Home Upgrade Program, the Multifamily Whole Building Program has as a primary purpose to test performance-based approaches in the multifamily housing retrofit market. The Multifamily Whole Building Program utilizes professional energy consultants to perform energy audits using approved multifamily audit tools and procedures to evaluate potential EE measures based on a least cost, maximum benefit approach customized to each property's specific needs.

The Multifamily Whole Building Program seeks deeper energy savings through a comprehensive approach. The program targets property owners/managers with scheduled project rehabilitation who are willing to invest in a performance-based whole-building approach. This performance-based approach aims to assist property owners and managers with making informed decisions, identify measures for energy savings, and maximize energy reductions for each property owner, manager, and tenant, as applicable. The incentives are designed to influence the implementation of comprehensive measures, and therefore are based on gas energy reduction achieved.

In addition to this program, SoCalGas also offers direct install programs to its multifamily

customers within its service territory that provides natural gas and water efficiency upgrades at no cost to the customer. These programs are provided throughout its service territory and are implemented jointly with the Los Angeles Department of Water and Power and the City of Pasadena.

Additionally, SoCalGas offers rebates for deemed measures through the SCE Multifamily Energy Efficiency Rebate (MFEER) Program for the purchase and installation of EE measures conducted by the property owner or manager.

#### **4. Comparable SCE Multifamily Program – Multifamily Energy Efficiency Rebate Program [SCE-13-SW-001C]**

The SCE (MFEER) Program is a continuation of the existing statewide program within the residential EE portfolios. The MFEER Program offers a variety of incentives for energy-saving products to motivate the multifamily property owners and managers to install energy-efficient equipment in both common and dwelling areas of multifamily properties. The Program can facilitate onsite assessments and encourage property owners to take advantage of rebates for more extensive improvements over time. The Program targets all levels of multifamily buildings (i.e., low-income, affordable-to-moderate income, market-rate), including those located in DACs.

Additionally, the Program addresses the ongoing concern with “split incentives”, where the residents are not the owners of the property, so they lack the incentive to improve their energy usage. Similarly, the property owners do not live on-site and thus do not pay higher utility expenses due to inefficient appliances, and therefore lack any incentive to upgrade to energy-efficient equipment.

SCE is in active solicitation for residential program offerings. Programs will be contracted by Sept 30, 2020 to begin implementation in 2021. While SCE does not yet know the composition of these programs, SCE will continue to work with SoCalREN to coordinate activities.

## **5. Coordination Protocol Between Programs**

A focus on collaboration of the PAs is critical to all multifamily programs' successes. The Joint PAs plan to implement monthly project coordination meetings with each PA's program implementers to minimize confusion for property owners, public agency stakeholders, and non-governmental market actors. Additionally, Joint PAs will participate in Energy Division-led Program Coordination Groups (PCG), with the goal of reaffirming clearly defined program goals and messaging.

The Joint PAs realize there is an opportunity to continue and deepen coordination to serve the multifamily segment. Coordination within multifamily programs has the potential to lead to deeper EE retrofits by combining their offerings with SoCalREN's whole-building program. Through SoCalREN's Residential Community Coordinator (RCC), all available information regarding all possible IOU program and incentive opportunities will be made available so that the Joint PAs' constituents are allotted all available options, thus gaining deeper energy savings for the state.<sup>43</sup>

## **6. Coordination Between SW Program(s)**

The Joint PAs will continue to participate in Energy Division-led PCGs. The statewide PCG for multifamily programs enables collaborative statewide (SW) discussions regarding all multifamily programs across all PAs throughout the state, not just those in Southern California.

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<sup>4</sup> Multifamily property owners who would otherwise not be captured through "whole-building offerings" due to the lack of that type of upgrade need, may be served better with programs such as the IOU MFEER or residential upstream offerings

**7. Compliance With D.12-11-015, SCR-RES-A1**

The following table describes in further detail how SoCalREN’s Multifamily Program satisfies the REN criteria in D.12-11-0115.

**Table 3: SoCalREN’s 2021 Multifamily Program Compliance With D.12-11-015**

REN Criteria	SoCalREN Multifamily Program (SCR-RES-A1)
1. Activities IOU cannot or does not intend to undertake	<ul style="list-style-type: none"> <li>• Leverage public agencies to drive multifamily downstream incentives to property owners.</li> <li>• Will market an incremental installation phase approach to allow multiple measures over time for whole building.</li> </ul>
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	<ul style="list-style-type: none"> <li>• SoCalREN’s multifamily program targets and provides special incentives for hard-to-reach customers and DACs; however, services will be offered to multifamily properties throughout its service territory.</li> </ul>

**B. SOCALREN RESIDENTIAL COMMUNITY COORDINATOR, (SCR-RES-A2)**

Partnerships with local governments continue to be a strong part of SoCalREN’s core service area, and the key to achieving SoCalREN’s goals. Similar to engaging with public agencies, having strong partnerships with stakeholders is another one of SoCalREN’s pillars. SoCalREN will be utilizing lessons learned from previous program cycles and has instituted a RCC approach. This RCC Program is a companion program to the SoCalREN Multifamily Program and will assist the hard-to-reach multifamily market by providing a variety of services to help this targeted segment overcome the traditional barriers to completing building energy upgrades.

Through the RCC Program, SoCalREN increases the number and deepen the existing partnerships with Community Based Organizations (CBOs) to engage hard-to-reach multifamily stakeholders. This program plan includes hosting EE workshops through CBOs, showcasing events for apartment and multi-unit complexes that have undergone upgrades, community-level energy consultative services, and assists building management to develop “playbooks” at project “close out” so that energy-

efficient operations persist over time.

EE upgrades continue to be a challenging concept to understand for most residential building property owners. Other programs focus primarily on technical assistance for individual property owners and building professionals (i.e., contractor outreach). SoCalREN will include community-level technical assistance for EE and integrated demand side management (IDSM). These events will help building owners overcome the hurdle of limited understanding and utilize the power of positive peer pressure to drive community support.

**1. Summary of Program Objectives**

- a) Demonstrate public agency actions toward promoting energy efficiency, targeting a goal of more than doubling the number of agencies and its constituents in making EE commitments.
- b) Drive program participation in hard-to-reach markets through local outreach and engagement about energy efficiency.
- c) Build relationships to drive conversion rates in underserved and hard-to-reach markets.
- d) Increase and deepen partnerships with stakeholders to drive adoption of EE.

**2. Summary of Program Differentiation**

The following table provides a summary of the RCC Program.

SCE and SoCalGas do not have a RCC Program, but instead have an IOU representative SPOC as part of the Multifamily Program.

**Table 4: SoCalREN RCC Program Summary**

<b>Program Parameters</b>	<b>SoCalREN</b>	<b>SCE</b>	<b>SoCalGas</b>
<b>Target Audience (s)</b>	Multifamily property owners –DACs/HTR	N/A	N/A
<b>Resource or Non-Resource</b>	Non-Resource	N/A	N/A
<b>Eligible Measures</b>	N/A	N/A	N/A
<b>Budget<sup>54</sup></b>	\$500,000	N/A	N/A

As described above, SoCalREN’s RCC program utilizes a “community-based” engagement

<sup>5</sup> The budgets provided herein are estimates. Final 2021 budgets will be provided in the PAs’ Annual Budget Advice Letters that will be filed on September 1, 2020.

approach to build confidence within the multifamily market and assist multifamily property owners in pursuing EE upgrades. This approach differs from the traditional IOU approach, which utilizes an IOU representative to act as a “Single Point of Contact (SPOC)”. SoCalREN’s RCC Program offers a coordinator who works with in-house local government agencies to organize events and assist with developing materials and tools for multifamily property owners. Leveraging local government agency community-based organizations will be an alternative to the traditional SPOC “single-entry point.” In addition, SoCalREN’s RCC Program will utilize its community reach to provide a comprehensive list of information on all EE and IDSM programs so that multifamily property owners are offered a wealth of information.

**3. Comparable Partner IOU Program**

Currently there is no comparable program to the proposed SoCalREN RCC Program, but the IOUs instead have an IOU representative SPOC as part of the Multifamily Program.

**4. Coordination Protocol Between Programs – N/A**

**5. Coordination Between SW Program(s)**

The Joint PAs will continue to participate in ED-led program PCGs. The SW Program Coordination Group for Multifamily programs enables collaborative SW discussions regarding all multifamily programs across all PAs throughout the state, not just those in Southern California.

**6. Compliance With D.12-11-015, SCR-RES-A2**

The following table describes in further detail how SoCalREN’s RCC Program satisfies the REN criteria in D.12-11-015.

**Table 5: SoCalREN’s 2021 RCC Program Compliance with D.12-11-015**

REN Criteria	SoCalREN Residential Community Coordinator Program (SCR-RES-A2)
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<b>1. Activities IOU cannot or does not intend to undertake</b>	<ul style="list-style-type: none"> <li>• Currently IOUs do not offer public agency residential community “single point of contact” engagement; IOU’s coordination is limited to private sector residential organizations.</li> </ul>
<b>2. Pilot activities where there is no IOU program offering and where there is potential for scalability</b>	<ul style="list-style-type: none"> <li>• Engage public agencies to drive energy efficiency in their residential communities.</li> <li>• Organize community-based events that explain the benefits of energy efficiency.</li> <li>• Partner with community development agencies to develop business processes that promote joint participation in energy efficiency and home rehabilitation programs.</li> </ul>
<b>3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap</b>	<ul style="list-style-type: none"> <li>• Utilize public agency relationships to build trust and confidence with hard-to-reach and DAC multifamily properties; This program’s primary target audience is HTR and DAC property owners;</li> </ul>

### **C. SOCALREN PUBLIC AGENCY ENERGY EFFICIENCY PROJECT DELIVERY PROGRAM, (SCR-PUBL-A1)**

The SoCalREN Public Agency Energy Efficiency Project Delivery Program (EE PDP) offers services to identify and complete Public Sector projects that are customized to meet the unique needs of each agency. The Program provides objective, third-party expertise to help agencies implement the best measures to maximize energy cost savings. All savings attribution goes to SCE and SoCalGas, because the SoCalREN Public Agency EE PDP is a non-resource program that funnels projects through utility core and third-party programs. In addition, SoCalREN’s EE PDP assists in the development and sharing of tools and resources through a peer-to-peer network to inspire local energy action.

Services include:

- Energy portfolio analysis tools and benchmarking support that help identify potential opportunities.
- Start-to-finish project management support
- Facility energy audit
- Exterior lighting retrofit audit and technical expertise
- Water and wastewater pumping and process optimization retrofits and other measures
- Retro-commissioning support
- Project financing analysis
- Support in access to financing, including EE financing and grant application services
- Development of contractor scope of work elements with EE performance specifications

- Access to competitively bid specialty contractors
- Assistance with utility incentive and rebate processing
- Construction management support
- Project close-out support and training
- Access to EE tools, resources & peer-to-peer learning opportunities
- Customized support to celebrate project success

## 1. Summary of Program Objectives

- Fill market gaps in the public sector and provide public agencies with an integrated, objective, and comprehensive EE solution for their facilities and non-facility infrastructure.
- Increase the percentage of public agencies that engage their communities in energy actions and EE strategies, thereby reducing overall community energy consumption, with a focus on disadvantaged and HTR communities.
- Increase the ability of public agencies to meet local, regional, and state energy targets and policy goals.
- Increase the number of participating public agencies in the SoCalREN EE PDP across the entire regional territory, with an emphasis on HTR and DACs.
- To position public agencies and strategic regional partners to lead community awareness campaigns; engage stakeholders; build public awareness of local, regional, and state efforts; and drive participation in PA core resource programs.
- Expand the implementation of cost-effective EE projects

## 2. Summary of Program Differentiation

The following table provides a summary of the PAs’ public agency programs.

**Table 8: SoCalREN Public Agency Energy Efficiency Project Delivery Program and IOU Partners Comparable Programs Summary**

Program Parameters	SoCalREN	SCE <sup>6</sup>	SoCalGas <sup>7</sup>
Target Audience (s)	Public Agencies: <ul style="list-style-type: none"> <li>• Cities, counties, tribes, K–12 schools, local government hospitals and hospital districts, water districts, wastewater districts, sanitation districts, ports, airports, and other special districts.</li> </ul>	All eligible: <ul style="list-style-type: none"> <li>• Cities</li> <li>• Counties</li> <li>• Water/wastewater Districts</li> <li>• K–12 Schools</li> <li>• Special Districts</li> <li>• Tribes</li> </ul>	All eligible: <ul style="list-style-type: none"> <li>• Cities</li> <li>• Counties</li> <li>• Water/wastewater Districts</li> <li>• K–12 Schools</li> <li>• Special Districts</li> <li>• Tribes</li> <li>• POU</li> </ul>
Resource or Non-Resource	Non-Resource	Resource	Resource & Non-Resource

<sup>6</sup> Note: This includes all Local Government Partnership Programs and other Public Sector Programs, Public Sector HOPPs, and Water Infrastructure Systems EE Program only. However, SCE and SoCalGas do provide EE services to all public sector customers through the programs outlined in the section below.

<sup>7</sup> Note: This includes all Public Sector programs listed in Appendix C.

<b>Eligible Measures</b>	N/A	Lighting, Pumping, HVAC, Process, Food Service, Whole Building, Motors, Office Equipment, Building Envelope, Refrigeration	Pipe and Tank Insulation, Boilers, Water Heaters, Pool Covers, Food Service, HVAC, Building envelope, Central Plant
<b>Budget<sup>8</sup></b>	\$7,590,000	\$7,600,000	\$5,300,000

SoCalREN’s EE PDP offers services customized to serve the specialized needs of public sector customers. For example, in SoCalREN’s EE PDP, project management and technical support are offered throughout the entire project lifecycle, including technical assistance, procurement assistance, construction management support, financing support, and access to actionable reports on energy data. The IOUs’ public sector technical assistance primarily focuses on project technical and financial details, but does not include detailed financial analysis, financing support, procurement assistance, or construction management support. SoCalREN EE PDP participants only need to be a SoCalREN enrolled agency to be eligible to participate in the program.

In 2019, after an identification of a gap was presented due to the reduction of local government partnerships, the SoCalREN added the regional partnership strategy to its EE PDP. The goal of regional partnership strategy is to increase energy efficiency impacts through enrollments, enhanced engagement, and ultimately increase EE projects and their associated savings through IOU resource program pipelines.

**Table 9: Public Sector Program Comparison**

<b>Program Parameters</b>	<b>SoCalREN: EE Project Delivery Program</b>	<b>SCE Public Sector Programs</b>	<b>SoCalGas Public Sector Programs</b>
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<sup>8</sup> The budgets provided herein are estimates. Final 2021 budgets will be provided in the PAs’ Annual Budget Advice Letters that will be filed on September 1, 2020. The following table compares the key program parameters of PAs’ public sector programs.

<b>Types of Public Agencies Served</b>	All eligible: <ul style="list-style-type: none"> <li>● Cities</li> <li>● Counties</li> <li>● Water/wastewater Districts</li> <li>● K-12 Schools</li> <li>● Special Districts</li> <li>● Tribes</li> </ul>	All eligible: <ul style="list-style-type: none"> <li>● Cities</li> <li>● Counties</li> <li>● State Government</li> <li>● Federal Government</li> <li>● Water/wastewater Districts</li> <li>● K-12 Schools</li> <li>● Community Colleges &amp; Universities</li> <li>● Special Districts</li> <li>● Tribes</li> </ul>	All eligible: <ul style="list-style-type: none"> <li>● Cities</li> <li>● Counties</li> <li>● State Government</li> <li>● Federal Government</li> <li>● Water/wastewater Districts</li> <li>● K-12 Schools</li> <li>● Community Colleges &amp; Universities</li> <li>● Special Districts</li> <li>● Tribes</li> <li>● POU's</li> </ul>
<b>Resource/ Non-resource</b>	Non-resource	Resource	Resource and Non-Resource
<b>Procurement Assistance</b>	Procurement and project delivery option analysis Access and extensive support to both customized and turnkey procurement approaches for energy projects Proposal and bid analysis Development of contractor scope of work with performance specifications Contractor cost estimate review	None	None

Program Parameters	SoCalREN: EE Project Delivery Program	SCE Public Sector Programs	SoCalGas Public Sector Programs
<b>Technical Assistance</b>	Customized technical support from project identification to completion, including investment grade audits to identify all energy saving opportunities, technical performance specifications and provide construction management support.	Customized technical support tailored to customer needs and potential, from project identification to completion, including investment grade audits to identify all energy saving opportunities.	Customized technical assistance to identify all-natural gas energy saving opportunities.
<b>Financial Support</b>	<p>Financial Analysis for projects to compare different financing options</p> <p>Support with financing and incentive applications and process</p> <p>Assistance with non-ratepayer funded financing</p> <p>Access to financial advisory services</p>	<p>Enhanced incentives for participation in downstream utility programs</p> <p>Support with financing and incentive applications and process through account representatives</p> <p>On-Bill Financing</p>	<p>Enhanced incentives for participation in downstream utility programs</p> <p>Support with financing and incentive applications and process through account representatives</p> <p>On-Bill Financing</p>
<b>Access to Energy Data</b>	<p>Access to Green Button data and customized reports to communicate data.</p> <p>Benchmarking support</p>	<p>Agency usage-level data on request</p> <p>Aggregate community-level data on request (EDRP Process)</p> <p>Green Button Connect My Data</p> <p>Green Button Download My Data</p> <p>Energy Atlas</p>	<p>Agency usage-level data on request</p> <p>Aggregate community-level data on request (EDRP)</p> <p>Energy Atlas/CATALENA</p> <p>Automated electronic bill data delivery via secure file transfer protocol</p>

Program Parameters	SoCalREN: EE Project Delivery Program	SCE Public Sector Programs	SoCalGas Public Sector Programs
<p><b>Energy Project Expertise to Implement Projects</b></p>	<p>Provides support at each stage to each participating agency through an assigned Project Manager along with access to engineering and construction support</p>	<p>Account Representatives provide project support</p> <p>Engineering support for all Public Sector customers</p> <p>Program Management support to coordinate technical assistance, procure third-party engineering support, and identify additional funding resources to assist Local Governments with all stages of project development and implementation</p>	<p>Account Representatives provide project support</p> <p>Engineering support to all Public Sector customers</p> <p>Engineering support to water agencies</p> <p>Program Management support to coordinate technical assistance, leverage applicable Third-Party Program resources and engineering support</p>
<p><b>Community Outreach</b></p>	<p>Development and sharing of tools and resources to promote regional and local energy action</p> <p>Customized support to engage community stakeholders and inspire regional and local energy action</p>	<p>n/a</p>	<p>Co-branded marketing to promote utility core programs</p> <p>Customized marketing support to engage communities and educate on other IDSM offerings that includes leveraging Core Program and Third-Party Program resources.</p>

<b>Sharing of Best Practices for Sustainability Efforts</b>	Sub-regional peer-to-peer workshops and trainings on relevant topics  Access to shared online resources and learning communities  Regular communication and coordination among Regional Partners and Advisory Committee members to share activities and best practices.	Regular communication with regional partnership Peer-to-peer meetings Regional meetings	Regular communication with regional partnership Peer-to-peer meetings Regional meetings
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**3. Comparable SCE Programs – Local Government Partnerships, Water Infrastructure System Efficiency (WISE), and Third-Party and In-House Energy Efficiency Programs and Services**

SCE’s Public Sector Programs focus on four major segments: local governments (City, County, Special Districts, other Public Agencies), state government (Correctional Facilities, Hospitals, State Agencies & Departments), federal government (Military, Hospitals, Other Federal Agencies, Native American Tribes), and education (K-12, Higher Education, University Hospitals). SCE intends to meet its Public Sector goals by following a comprehensive list of program intervention strategies at various intervals throughout the 2021 period. SCE’s Public Sector Programs also target jurisdictions with DACs, and rural and HTR communities. Some of the programs that focus on local governments are highlighted below; however, all public sector customers are serviced by SCE EE Programs.

SCE’s Local Government Partnership Program provides support to local governments in SCE’s service territory in order to identify and address EE opportunities in municipal facilities. A key goal of SCE’s Local Government Partnerships is helping cities and counties to lead by example by addressing EE first in their own municipal facilities through enhanced incentives for core savings projects.

SCE’s Water Infrastructure Systems Efficiency Program provides support to water and wastewater system operators (local governments, water and wastewater districts, etc.) to deliver EE in water distribution and treatment systems. The Program offers a comprehensive and turnkey solution, including no-cost project engineering services, project support, and financial incentives.

SCE offers a portfolio of third-party implemented programs to support Public Sector customers and will be soliciting new third-party programs for the Public Sector in 2021. Additionally, SCE's EE Customized and Express Solutions Programs are available to all customers, regardless of size or energy use, and can be paired with SCE in-house technical assistance to assist customers with site audits, project development, and creating project feasibility studies, among other services. Both third-party implemented programs and SCE in-house programs and services are offered at no cost to the customer.

#### **4. Comparable SoCalGas Public Sector Programs**

SoCalGas Public Sector Programs focus on four major segments: local governments (City, County, Special Districts, other Public Agencies that include POUs), state government (Correctional Facilities, Hospitals, State Agencies & Departments), federal government (Military, Hospitals, Other Federal Agencies, Native American Tribes, and education (K-12, Higher Education, University Hospitals)). SoCalGas intends to meet its Public Sector goals by following a comprehensive list of program intervention strategies at various intervals throughout the Rolling Cycle. SoCalGas Public Sector Programs also target jurisdictions with DACs, and rural and HTR communities.

SoCalGas Public Sector Programs currently consist of 18 Local Government Partnership Programs (LGP) listed in Table 2 below. SoCalGas LGP is designed to support local governments and some special districts in the following areas:

##### Government Facilities

- Retrofit
- Retro-commissioning
- Facility Energy Audit
- Integrated Demand Response
- Technical Assistance
- On-Bill Finance
- Inter-agency Coordination

##### Strategic Plan Support

- Code Compliance
- Reach Code Support
- Benchmarking
- Guiding Document Support
- Peer to Peer Support, Best Practices



## Core Program Coordination

- Outreach & Education (WE&T, Codes & Standards, EE Training and Workshop, etc.)
- Third-Party Program Coordination
- Financing for the Community
- Technical Assistance

SoCalGas intends to expand its EE offerings and services in 2021 to all Public Sector customers, including those Public Agencies that are not in the current LGP through a suite of new program designs, improved strategies, offerings and services, such as EE Direct Install, Public Sector Deemed and Calculated programs and new Programs resulting from the Third-Party Solicitation process. Local and regional solutions may be adopted to achieve Public Sector goals. SoCalGas also has partnerships with many municipal utilities to jointly design and deliver EE programs to the shared customer base.

### **5. Coordination Protocol Between Programs**

In 2013, the Joint PAs worked closely together to produce a clear, concise project coordination strategy titled “SoCalREN-IOU Coordination Plan for Public Agencies” for SoCalREN’s Public Sector Programs. This same document will be used as the coordination protocol for the EE PD Program, DER DAC Program, and Public Agency NMEC Program (discussed in the next sections). This plan is closely followed by all parties and lays out all coordination regarding agency enrollment, commitment, and ongoing SoCalREN project delivery services. This document is provided in Appendix E.

In addition to the SoCalREN-IOU Coordination Plan implemented by the Joint PAs, there is also a monthly "program coordination call" and monthly IOU-specific “project coordination call.”

SoCalREN hosts a “pre-coordination call” with IOUs and other relevant third-party or LGP stakeholders prior to any in-person engagement meeting to enroll a new agency. This "pre-coordination call" helps to mitigate customer confusion and serves to keep all parties informed of ongoing projects. The Joint PAs will leverage this successful approach for other sectors in their 2021 portfolios.

As mentioned above, SoCalREN works with several “Regional Partners” that provide enhanced and customized outreach and engagement to regions throughout SoCalREN territory within their geographical region of influence. In cases where these Regional Partners support other IOU programs, all parties will work closely together to ensure the appropriate program(s) is being represented and

coordinated among parties to eliminate customer confusion.

**6. Coordination between SW program (s) – N/A**

**7. Compliance with D.12-11-015, SCR-PUBL-B1**

The following table describes in further detail how SoCalREN’s EE PD program satisfies the REN criteria in D.12-11-015.

**Table 10: SoCalREN’s 2021 EE PD Program Compliance with D.12-11-015**

<b>REN Criteria</b>	<b>SoCalREN Public Agency EE Project Delivery Program (SCR-PUBL-B1)</b>
<b>1. Activities IOU cannot or does not intend to undertake</b>	<ul style="list-style-type: none"> <li>• One-stop, end-to-end service delivery that includes technical assistance, procurement assistance, financial support services, construction management support, and all project management until project completion for electrical and natural gas EE projects. IOU programs’ public sector technical assistance primarily focuses on project technical and financial details but does not include non-CPUC financing support, procurement assistance or construction management support.</li> <li>• As a public entity, SoCalREN is able to offer valuable third-party advice to agencies as a trusted advisor and can help weigh the benefits and risks of</li> </ul>
<b>2. Pilot activities where there is no IOU program offering and where there is potential for scalability</b>	N/A
<b>3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap</b>	N/A

**D. SOCALREN PUBLIC AGENCY DER DAC PROJECT DELIVERY PROGRAM, (SCR-PUBL-B2)**

To further support the Public Sector and to expand on lessons learned from existing strategies utilized by SoCalREN in the Public Sector, the SoCalREN expanded its one-stop EE project delivery to include consideration of Distributed Energy Resources (DER) during EE audits and provide recommendation for the integration of DERs in implementation of EE projects. This Program is offered within DACs. Similar to SoCalREN’s existing Public Agency Energy Efficiency Project Delivery Program, the Distributed Energy

Resource DAC Project Delivery (DER DAC PDP) sub-program will provide all customized EE project management and educational services as listed in the EE PDP section above, but will also provide information and subject matter expertise regarding all aspects of possible DER implementation for all public agencies serving DACs, with the goal of maximizing EE opportunities, while driving the integration of DERs to increase understanding of ZNE-pathways . SoCal REN DER DAC PDP implements program enhancements to its existing Energy Efficiency Project Delivery platform to include services that deliver DER opportunity identification during EE audits, analysis, and educate agencies on available DER project services and resources. SoCalREN has learned that for most public agencies that are enrolled in the program, EE retrofits are just the beginning. Many want to achieve deeper energy savings and greater energy self-reliance through renewable generation, energy storage, and sophisticated energy management systems as well as greater water efficiency savings.

**1. Summary of Program Objectives**

- a) Increase the percentage of DAC public agencies that engage their communities in DER energy actions and strategies, thereby reducing overall community energy consumption.
- b) Increase the ability of public agencies to meet local, regional, and state DER and DAC energy goals.
- c) Increase the number of public agencies participating in SoCalREN’s EE programs, with an emphasis on DACs .
- d) Enroll DAC public agencies to engage their constituents about energy and DER programs and strategies, with a focus on disadvantaged and hard-to-reach communities.

**2. Summary of Program Differentiation**

The following table provides a summary of the Public Agency DER DAC PDP. The utilities have a variety of programs that promote DER technologies, but SCE and SoCalGas do not have a Public Agency DER DAC PDP in their EE portfolios.

**Table 11: SoCalREN Public Agency DER DAC Project Delivery Program Summary**

Program Parameters	SoCalREN	SCE	SoCalGas
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<b>Target Audience (s)</b>	Public Agencies in Disadvantaged Communities: <ul style="list-style-type: none"> <li>Cities, counties, tribes, local government hospitals and hospital districts, K-12 schools, water districts, wastewater districts, sanitation districts, ports, airports, and other</li> </ul>	N/A	N/A
<b>Resource or Non-Resource</b>	Non-Resource	N/A	N/A
<b>Eligible Measures</b>	N/A	N/A	N/A
<b>Budget<sup>9</sup></b>	\$2,800,000	N/A	N/A

SoCalREN’s DER DAC PDP differs from any within its region. It leverages the Energy Efficiency Project Delivery program (EE PDP) implementation model to educate and inform public agencies on both EE and DER integration strategies. Identification of DER strategies in combination with EE projects will drive greater reductions in Greenhouse Gas (GHG) emissions from public agencies.

Unique DER elements of this program enhancement include:

- Education and outreach in regard to DER portfolio services that include the integration of distributed generation, energy storage, demand response, energy management, and water efficiency optimization for public agencies.
- A process protocol of integrating DER activities into the Program’s one-stop process.
- Specific strategies, tools, and templates and integrate best industry standards into a project delivery manual.
- Identify the technical expertise required for each of the DER resource areas and assist public agencies in managing a competitive process to assemble the best team of expert consultants and practitioners.
- Build public agency expertise networks through training and development workshops related to best practices protocols across all DER energy service areas so this can be leveraged to assist current and potential SoCalREN enrolled public agencies.

This Program was launched as a trial phase to test and demonstrate essential components of the

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<sup>9</sup> The budgets provided herein are estimates. Final 2021 budgets will be provided in the PAs’ Annual Budget Advice Letters that will be filed on September 1, 2020.

new project delivery system and approaches; so that if this approach proves successful in the integration of distributed energy resource implementation (i.e., EE, DR) for public agencies, it can be scaled or modeled by IOUs in the future. Through the use of non-CPUC funds (CEC ARRA funding) the program has expanded its services offered to include DER technical assistance, on-site benchmarking and water efficiency into participating projects.<sup>10</sup> Technical assistance may include DER measure audits and development of technical performance specifications which are not currently offered through the existing EE rate-payer funded programs. Through the County of Los Angeles, SoCalREN can leverage non-ratepayer funds for non-EE related activities, ensuring compliance with CPUC EE guidance and lessening the cost to ratepayers. This non-ratepayer funding capability is unique to SoCalREN.

While there is no current IOU program through the EE portfolio that targets DERs, the following table outlines the differences between the existing IOU custom process and the SoCalREN Public Agency DER DAC PDP.

**Table 12: Public Agency DER DAC Program Comparison**

<b>Program Parameters</b>	<b>SoCalREN DER DAC PDP</b>	<b>SCG/SCE Customized Program</b>
<b>Eligible Facilities</b>	Buildings and Non-facilities; e.g., exterior lighting (incl. Street lighting)	Buildings and Non-facilities
<b>Eligible Agencies</b>	Eligible DAC Public Agencies only	All non-residential customers
<b>Eligible Measures</b>	Measures that may result in energy savings, energy generation, demand response savings or water savings	Measures that deliver above-code energy savings
<b>Technical Assistance</b>	Project Management, Financial Analysis & Services, and Auditing	Incentive application support offered by Account Executive
<b>Performance Payment</b>	No monetary incentives	Monetary incentives

<sup>10</sup> SoCalREN was allotted by the CEC half-million annually for the years 2020 and 2021 in re-purposed ARRA funding to provide full scale DER audits and on-site benchmarking for all program DER DAC participants. Subject to the performance results of the program additional funds may be allocated by the CEC for additional years.

<b>Resource or Non-Resource</b>	Non-resource – this program is similar to SoCalREN’s EE PDP– it offers customers a one-stop shop project delivery and will include education and outreach regarding all DERs; EE Funds will be limited to EE in- kind incentives and non-CPUC funds will be utilized for non-EE activities (i.e. DER technical assistance or audits).	Resource
<b>Approval Process</b>	None as the agency would be guided to utility programs; e.g., SGIP, DR participation	Custom Process
<b>2021 status</b>	In market since April 2019 and Accepting new projects for 2021	Accepting new projects
<b>Funding</b>	<ul style="list-style-type: none"> <li>CPUC EE Ratepayer Funds</li> </ul> American Recovery and Reinvestment Act (ARRA) and other sources	CPUC EE

**3. Comparable Partner Program**

Currently there is no comparable program to the proposed SoCalREN Public Agency DER DAC PDP, in the IOU EE portfolio. The utilities do, however, have programs that target various DER technologies outlined in the SoCalREN Public Agency DER DAC PDP. The SoCalREN Public Agency DER DAC PDP is the conduit that helps fuel participation in the IOU programs that target various DER technologies.

**4. Coordination Protocol Between Programs**

Although there are no current comparable IOU programs in the EE portfolio, this Program can serve as a conduit of information between all the IOUs’ applicable DER pilots/programs and public agencies. The Joint PAs will leverage the coordination protocol (in Appendix E) for program and project coordination to ensure that all available information is being provided to public agency participants and IOU partner programs.

**5. Coordination Between SW Program (s) – N/A**

**6. Compliance With D.12-11-015, SCR-PUBL-B2**

The following table describes in further detail how SoCalREN’s Public Agency DER DAC PDP satisfies the REN criteria in D.12-11-015.

**Table 13: SoCalREN’s 2021 Public Agency DER DAC PD Program Compliance With D.12-11-015**

REN Criteria	SoCalREN Public Agency DER DAC PDP(SCR-PUBL-B2)
1. Activities IOU cannot or does not intend to undertake	<ul style="list-style-type: none"> <li>• One-stop end-to-end service delivery focused on all available DER opportunities (energy storage, demand response, energy management, and water efficiency optimization) that improves the customer experience, builds capacity and expertise, and inspires a level of public agency awareness and motivates action.</li> </ul>
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	<ul style="list-style-type: none"> <li>• Maximizing EE opportunities, while driving the integration of DERs (energy storage, demand response, energy management, and water efficiency optimization) to increase understanding of ZNE-pathways.</li> <li>• Assists public agencies in understanding their choices and drives greater participation and higher adoption of DER programs, including all IOU partner programs.</li> <li>• Designed to support upgrades of public agency buildings and facilities with an emphasis on supporting projects that serve (DACs).</li> </ul>
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	<ul style="list-style-type: none"> <li>• Currently only available to DACs which fall within the recently adopted HTR definition;</li> <li>• This program will indirectly support HTR communities by encouraging public agencies to further building decarbonization and drive GHG reductions.</li> </ul>

**E. SOCALREN PUBLIC AGENCY NMEC PROGRAM, (SCR-PUBL-B3)**

Under the Public Agency NMEC Projects Program, SoCalREN employs a NMEC framework and targets projects that were previously identified by the SoCalREN EE PDP but were not pursued by agencies due limitations of existing EE programs. This Program provides an alternative to the existing utility incentive process, while pursuing stranded potential in their exterior lighting, public agency facilities and buildings. This Program is a resource program, so EE savings from these projects contribute

to SoCalREN program goals and cost-effectiveness calculations.

**1. Summary of Program Objectives**

- To meet multiple NMEC Program objectives, including ensuring savings persistence, reducing multi-measure project complexity, and improving completion timelines in the public sector.
- Other key goals are to explore performance-based methods in the public sector, achieve a minimum project savings 10% overall, and to develop new Program and method expertise.
- Provide training and educational materials to facility personnel to ensure persistence of savings.

**2. Summary of Program Differentiation**

The following table provides a summary of the PAs’ Public Sector NMEC-based programs.

**Table 14: SoCalREN, SCE, and SoCalGas NMEC-Based Programs Summary**

<b>Program Parameters</b>	<b>SoCalREN Public Agency NMEC Program, (SCR-PUBL-B3)</b>	<b>SCE Public Sector Performance-Based Retrofit High Opportunity Program [SCE-13-L-0031]</b>	<b>SoCalGas High Opportunity Projects and Program - Metered and Performance-Based Retrofits (MPBR) Program</b>
<b>Target Audience (s)</b>	Public Agencies: <ul style="list-style-type: none"> <li>• Cities, counties, tribes, local government hospitals and hospital districts, water districts, K-12 schools, wastewater districts, sanitation districts, ports, airports, and other special districts.</li> </ul>	Public Sector	Public Sector
<b>Resource or Non-Resource</b>	Resource	Resource	Resource
<b>Eligible Measures</b>	Street Lighting/Exterior Lighting CMPA Methodology – includes whole building retrofits and behavioral and operational savings	CMPA Methodology – includes whole building retrofits and behavioral and operational savings	CMPA Methodology – includes whole building retrofits and behavioral and operational savings
<b>Budget<sup>13</sup></b>	\$1,550,000	\$500,000	\$450,000 <sup>14</sup>

SoCalREN will target agencies who are enrolled in the EE PDP and have facilities that have not participated in utility programs. Participating agencies also benefit from the SoCalREN Program’s



project management expertise and technical services. Similar to the partner IOU NMEC programs, engineers with experience in ASHRAE energy savings calculation standards and International Performance Measurement and Verification Protocols (IPMVP) will be prioritized in executing NMEC projects. The SoCalREN Public Agency NMEC Program provides technical assistance, financial analysis services, and full-service streamlined process (project management for participating agency projects are all to be conducted by SoCalREN until project completion) within CPUC NMEC Guidelines that go through the CMPA process. The SoCalREN Public Agency NMEC Program differs from the IOUs NMEC programs by providing procurement and project delivery option analysis, proposal and bid analysis, development of contractor scope of work with performance specifications, and contractor cost estimate review and ongoing training and support post-installation.

This approach road-tests critical elements of NMEC implementation in a public agency context, such as normalized usage data and metered savings verification, as a comprehensive, whole-building approach to energy upgrades. In contrast to the IOU programs, no monetary incentives will be preliminarily offered to the agency based on post-installation energy performance.

The following table compares the key program parameters of PAs' NMEC-based programs.

**Table 15: NMEC-Based Program Comparison**

<b>Program Parameters</b>	<b>SoCalREN NMEC Program</b>	<b>SCE Public Sector HOPPs Program</b>	<b>SoCalGas HOPPs Program</b>
<b>Eligible Facilities</b>	Buildings and Non-facilities; e.g., exterior lighting (incl. Street lighting)	Buildings	Buildings
<b>Eligible Agencies</b>	Eligible sub-segment of Public Agencies (target DACs)	All Public Sector	All Public Sector
<b>Eligible Measures</b>	Any measure that reduces energy usage	Any measure that reduces energy usage, must include at least one retrofit	Any measure that reduces energy usage to achieve 20% savings and a minimum of 7,000 Therms
<b>Technical Assistance</b>	Project Management, Financial Analysis & Services, Auditing, Modeling and M&V Plan and Procurement, post implementation training, performance tracking and savings persistence	Modeling, M&V Plan, Project Management, Financial Analysis & Services	M&V Plan, facility audits, energy efficiency education related to retrofits, performance tracking and savings persistence
<b>Measurement</b>	CMPA (IPMVP Option C)	CMPA (IPMVP Option C)	CMPA (IPMVP Option C)
<b>Baseline</b>	Existing conditions	Existing conditions	Existing Conditions
<b>Performance Payment</b>	No monetary incentives, only Technical Assistance	Monetary Incentives provided on post-implementation measurement of energy savings based on meter data.	Incentives provided on a post-implementation measurement of energy savings based on meter data.
<b>Resource or Non-Resource</b>	Resource	Resource	Resource

Program Parameters	SoCalREN NMEC Program	SCE Public Sector HOPPs Program	SoCalGas HOPPs Program
<b>Approval Process</b>	Streamlined Process (Project Management for agencies so all heavy lifting is done by SCR implementer) within CPUC NMEC Guidelines that will go through the CMPA	CPUC HOPPS Guidelines	CPUC HOPPS Guidelines
<b>2021 status</b>	In the market as of April 2019, accepting new projects and specifically projects that were first not eligible through the IOUs	Accepting new projects	Accepting new projects

**3. Comparable SCE Public Sector Program – Public Sector Performance-Based Retrofit High Opportunity Program [SCE-13-L-0031]**

SCE’s Public-Sector Performance Based Retrofit HOPPs is designed to leverage smart meter investments and to bring the benefits of NMEC to Public Sector buildings. Through key interventions, the Program will interact with the Public Sector to reduce and/or eliminate market barriers and gaps. Key interventions include:

- Comprehensive audits, which help identify savings opportunities across traditional program types as a means of technical support.
- Metering or sub-metering combined with monitoring, to potentially drive greater EE by showing the direct ongoing economic impact of measures in existing buildings. Limited visibility of individual building energy costs can be improved by providing meter-based feedback that help determine if energy savings goals are being achieved in a persistent fashion.
- Merging of multiple program offerings into a single unified program, thereby simplifying and streamlining the customer application process.

Additional interventions to ensure that the program remains cost-effective include:

- Incentives that are paid at 3, 12, and 24 months, with each payment truing up to the estimated savings at each interval, assisting in addressing cost-related barriers.
- Participant audits costs for the program are captured in total project costs.
- Ongoing measurement of savings to two years and beyond.

As stated in section C above, SCE offers a portfolio of third-party implemented programs to support Public Sector customers and will be soliciting new third-party programs for the Public Sector in 2021. While SCE does not yet know the composition of these programs, SCE will continue to work with SoCalREN to coordinate activities.

#### **4. Comparable SoCalGas High Opportunity Projects and Program Public Sector Program – Metered and Performance Based Retrofit (MPBR) Program**

The SoCalGas MPBR Program assists Public Sector customers in retrofitting existing facilities and incorporating innovative monitoring-based commissioning (MBCs). The Program established a “proof of concept” that EE equipment retrofits in combination with monitoring-based commissioning of public sector buildings can achieve a higher level of cost-effective energy savings compared to traditional retrofits or retro-commissioning. Customers can streamline project implementation timelines by combining formerly separate EE actions. The MPBR Program is designed to incentivize projects to go from an existing condition baseline to or above code in order to encourage customers to implement retrofits that they would not have completed absent the Program incentive. These incentives are provided both on a pre- and post-measurement of energy savings. In support of participants employing a whole-building retrofit, the program offers other non-resource benefits such as facility audits, technical assistance, and EE retrofit education.

Additionally, SoCalGas provides an NMEC incentive pathway to its nonresidential and Public Sector calculated programs for customers to be able to participate in this approach.

#### **5. Coordination Protocol Between Programs**

As part of the Public Sector program coordination call, SoCalREN, SCE, and SoCalGas program teams will discuss marketing campaigns, continued coordination, any issues impacting the programs, and

to learn about updates of other programs (i.e., financing) that could benefit financed EE projects.

In addition, these calls will be utilized to discuss project status, updates, and coordination between the projects’ participation in SoCalREN’s RLF and IOU OBF Programs. These calls will also be utilized to identify any overlaps and mitigate customer confusion.

The Joint PAs developed and maintain an “NMEC Participation Coordination for Public Agencies” document. This document will serve as the coordination protocol for the Joint PAs’ in which all REN and IOU NMEC projects can coordinate and is attached in Appendix E.

### **6. Coordination Between SW Program (s)**

The Joint PAs will continue to participate in ED-led PCGs. The statewide PCGs for NMEC and Public Sector programs enables collaborative SW discussions regarding all Public Sector programs across all PAs throughout the state, not just those in Southern California.

### **7. Compliance With D.12-11-015, SCR-PUBL-B3**

The following table describes in further detail how SoCalREN’s Public Agency NMEC Program satisfies the REN criteria in D.12-11-015.

**Table 16: SoCalREN’s 2021 Public Agency NMEC Program Compliance with D.12-11-015**

<b>REN Criteria</b>	<b>SoCalREN Public Agency NMEC Program (SCR-PUBL-B1)</b>
<b>1. Activities IOU cannot or does not intend to undertake</b>	<ul style="list-style-type: none"> <li>• Offers procurement assistance, construction management support, financial analysis services and project management with a NMEC approach.</li> <li>• A program design that offers an alternative to traditional rebate/incentive programs – no incentive provided.</li> </ul>
<b>2. Pilot activities where there is no IOU program offering and where there is potential for scalability</b>	
<b>3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap</b>	<ul style="list-style-type: none"> <li>• Designed to support upgrades of public agency buildings and facilities including prioritizing projects that serve DACs.</li> </ul>

## **F. SOCALREN PUBLIC AGENCY REVOLVING LOAN FUND, (SCR-FIN-C1)**

The SoCalREN Revolving Loan Fund (RLF) Program serves as a companion to the Public Agency EE PDPs of the SoCalREN Portfolio. The SoCalREN RLF is designed to support upgrades of public agency buildings and facilities with a priority on supporting projects that serve DACs. Financing through the RLF Program is designed to be a catalyst for accelerating project implementation. Loans serve as short-term construction financing and help under primarily two scenarios: bridge financing for approved On-Bill Financing (OBF) provided by the utility after project completion and bridge financing for approved but un-budgeted agency projects that would otherwise wait for budget allocation.

This offering serves as a catalyst for agency enrollment and project development, and as a potential magnet for increasing public agency participation in EE programs. The SoCalREN RLF Program will create a unique resource for public agencies in that it will have terms more advantageous than conventional loans and will significantly complement and supplement the IOU OBF Programs. Loans will be financed by non-ratepayer funds. SoCalREN will leverage EE funds for the management and marketing of the fund.

### **1. Summary of Program Objectives**

- a) To stimulate agency enrollment and project development and increase public agency participation in EE programs.
- b) Assist Public Agencies in overcoming the barrier to capital due to rigid funding and budget requirements/restrictions.
- c) Provide a low-cost solution for EE short-term project financing for public agencies.

### **2. Summary of Program Differentiation**

The following table summarizes the PAs' Public Sector Financing Programs.

**Table 17: SoCalREN, SCE and SoCalGas Public Sector Financing Programs Summary**

<b>Program Parameters</b>	<b>SoCalREN Public Agency RLF, (SCR-FIN-C1)</b>	<b>SCE On-Bill Financing [SCE-13-SW-007A]</b>	<b>SoCalGas Statewide Finance Program – On-Bill Financing [SCG3735]</b>
<b>Target Audience (s)</b>	Public Agencies: <ul style="list-style-type: none"> <li>Cities, counties, tribes, K-12, local government hospitals and hospital districts, water districts, wastewater districts, sanitation districts, ports, airports, and other special districts.</li> </ul>	All non-residential customers, including all Public Sector customers	All non-residential customers, including all Public Sector customers
<b>Resource or Non-Resource</b>	Non-resource	Resource	Resource
<b>Eligible Measures</b>	N/A	N/A	N/A
<b>Budget<sup>11</sup></b>	\$550,000 (CPUC Funds) (\$2,100,000 Non CPUC funds)	\$800,000 (implementation budget) \$17,000,000 (total loan pool)	\$658,531 (Implementation Budget) \$5,500,000 (total loan pool)

SoCalREN’s RLF offers short-term construction and bridge financing available immediately to fund projects while waiting for budget allocation or other longer-term financing options as they become available. This short-term, low-interest financing is currently not offered by the IOUs. In addition, the SoCalREN’s RLF leverages external funds such as ARRA funding, which differs from SW and IOU financing Programs that rely on CPUC ratepayer funds. This will assist in reducing the cost to ratepayers. SoCalREN EE funds will be limited to administration, marketing, and DI costs.

The following table compares the key program parameters of the PAs’ Public Sector financing Programs.

<sup>11</sup> The budgets provided herein are estimates. Final 2021 budgets will be provided in the PAs’ Annual Budget Advice Letters that will be filed on September 1, 2020

**Table 18: Public Sector Financing Program Comparison**

<b>Program Parameters</b>	<b>SoCalREN: Revolving Loan Fund (RLF)</b>	<b>SCE comparable program: On-Bill Financing (OBF)</b>	<b>SoCalGas comparable program: On-Bill Financing (OBF)</b>
<b>Amount Financed</b>	100% of project costs up to Program cap (no incentive provided)	Qualifying project cost, less approved rebates and incentives, up to Program cap	Qualifying project cost, less approved rebates and incentives, up to Program cap by meter
<b>Timing of Loan Funds Distribution</b>	Upfront - before project installation and upon receipt of signed RLF Loan Agreement	Post-Installation - After project installation, Installation Report approval and signed OBF Loan Agreement submitted	Post-Installation - After project installation, installation approval and signed OBF Loan Agreement submitted. Additionally, Public Sector customers are eligible to receive milestone payments during installation. After installation is complete, the prefunded loan amount will convert to a standard OBF loan.
<b>Source of funds leveraged for financing</b>	Non-ratepayer funding	Ratepayer funding	Ratepayer funding
<b>Term</b>	Up to 2 years, regardless of installed equipment	Up to 10 years or EUL of installed equipment	Up to 15 years or EUL of installed equipment
<b>Eligible Measures</b>	All measures related to an EE project	Measures with Utility rebates and incentives	Measures with Utility rebates and incentives
<b>Annual % interest rate</b>	0%	0%	0%
<b>Other Fees</b>	One-time Administrative Fee	None	None
<b>Repayment</b>	Off-Bill	On-Bill	On-Bill

**3. Comparable SCE and SoCalGas Statewide Finance Program – On-Bill Financing [SCE-13-SW-007A and SCG3735]**

The On-Bill Financing (OBF) Program offers zero-percent interest financing for the installation of qualifying EE measures. Loans are available to qualifying non-residential customers, including



commercial, industrial, government, and institutional customers, and customers repay their loan as a line item on their bill. This Program supports the Strategic Plan's Commercial Sector goals and strategies.

OBF is offered with other SCE and SoCalGas programs, including SW, Third-Party, Retro-commissioning, and Local Government Partnership offerings.

SoCalGas Public Sector customers are also eligible to receive loan prefunding during installation in the form of milestone payments to contractors. The prefunding provided will then automatically convert an OBF loan upon project completion.

#### **4. Coordination Protocol Between Programs**

As part of the Public Sector program coordination call, SoCalREN, SCE, and SoCalGas program teams will discuss marketing campaigns, continued coordination, any issues impacting the programs, and to learn about updates of other programs (i.e., financing) that could benefit financed EE projects.

In addition, these calls will be utilized to discuss project status, updates, and coordination between the projects' participation in SoCalREN's RLF and IOU OBF Programs. These calls will also be utilized to identify any overlaps and mitigate customer confusion.

#### **5. Coordination Between SW Program(s)**

The Joint PAs will continue to coordinate with the SW implemented financing programs so that customers are provided with all possible EE financing options. In addition, the Joint PAs will leverage lessons learned from SW implemented financing programs and provide feedback in public meetings held by the SW implementer for EE financing programs, California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA).

In addition, the Joint PAs will leverage the coordination protocol (Appendix E) for program and project coordination to ensure all available information is being provided to public agency participants and IOU partner programs.

**6. Compliance With D.12-11-015, SCR-FIN-C1**

The following table describes in further detail how SoCalREN’s Public Agency RLF Program satisfies the REN criteria in D.12-11-015.

**Table 19: SoCalREN’s 2021 Public Agency RLF Program Compliance with D.12-11-015**

<b>REN Criteria</b>	<b>SoCalREN Public Agency RLF Program (SCR-FIN-C1)</b>
<b>1. Activities IOU cannot or does not intend to undertake</b>	<ul style="list-style-type: none"> <li>Utilizing non-CPUC funds to provide financing for public agency EE projects;</li> </ul>
<b>2. Pilot activities where there is no IOU program offering and where there is potential for scalability</b>	<ul style="list-style-type: none"> <li>Provide public agencies short-term financing for EE projects.</li> <li>Designed to be a catalyst for accelerating EE project implementation.</li> <li>Terms more advantageous than conventional CEC loans.</li> <li>Complement and supplement the IOU OBF programs.</li> <li>Designed to support upgrades of public agency buildings and facilities with an emphasis on supporting projects that serve DACs.</li> </ul>
<b>3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap</b>	

**G. SOCALREN RESIDENTIAL LOAN LOSS RESERVE, (SCR-FIN-C2)**

The SoCalREN Residential Loan Loss Reserve (also known as the Multifamily Finance Program (MFF Program or Program) broadens access to finance for more multifamily property owners/contractors for EE upgrades by allowing a financial institution partner to modify its underwriting criteria and accept more risk than it would otherwise on qualified projects. The Program design incorporates a credit enhancement that will reduce the borrowing rate for the borrower and the design incorporates features that make the program process easy for the borrowers, financial institutions, contractors, and the administrator, therefore encouraging investments in EE.

The Program provides a credit enhancement for loans to fund the installation of a set of EE measures recommended through an energy assessment conducted by the Multifamily Program staff and property owner’s contractor. The credit enhancement absorbs any losses before the lending

partner does and funds revolve as loans amortize.

**1. Summary of Program Objectives**

- a) Use public funds to mobilize, leverage, and support the financial institution partner.
- b) Broaden access to finance for more multifamily property owners by allowing the financial institution partner to modify its underwriting criteria and accept more risk than it would otherwise.
- c) Provide additional credit-risk enhancement to hard-to-reach markets

**2. Summary of Program Differentiation**

The following table summarizes the PAs’ Loan Loss Reserve Financing Programs.

**Table 20: SoCalREN, SCE, and SoCalGas Loan Loss Reserve/Financing Programs Summary**

<b>Program Parameters</b>	<b>SoCalREN Residential LLR, (SCR-FIN-C2)</b>	<b>SCE New Finance Offerings [SCE-13-SW-007C]</b>	<b>SoCalGas New Finance Offerings [SCG3737]</b>
<b>Target Audience (s)</b>	Multifamily property owners	Residential customers	Residential customers, Affordable Multifamily Property Owners and Small Business
<b>Resource or Non-Resource</b>	Non-resource	Non-resource	Resource
<b>Eligible Measures</b>	N/A	See <a href="http://gogreenfinancing.com">gogreenfinancing.com</a>	See <a href="http://gogreenfinancing.com">gogreenfinancing.com</a>
<b>Budget<sup>12</sup></b>	\$1,175,000	\$100,000 for New Finance Offerings Program	Residential - \$21 million in credit enhancements  Multifamily Program- \$2.1 million in credit enhancements

SoCalREN’s Residential LLR program will be limited to multifamily property owners who are actively seeking a “whole-building” retrofit. SoCalREN’s LLR will emphasize customers with the most need and who are HTR, and properties within DACs.

The following table compares the key program parameters of the PAs’ LLR/Financing Programs.

**Table 21: Residential Loan Loss Reserve Program Comparison**

<sup>12</sup> The budgets provided herein are estimates. Final 2021 budgets will be provided in the PAs’ Annual Budget Advice Letters that will be filed on September 1, 2020

<b>Program Parameters</b>	<b>SoCalREN: Loan Loss Reserve Program</b>	<b>SCE/SoCalGas New Finance Programs - Residential Energy Efficiency Loan (REEL)</b>	<b>SCE/SoCalGas New Finance Programs – Affordable Multifamily Financing Program</b>
<b>Target Audience</b>	Multifamily	Single Families	Affordable Multifamily Properties
<b>Eligible Properties</b>	Multifamily properties of 3 or more units within the SoCalREN territory	Single Family properties	Affordable multifamily properties of five or more units, where at least 50% of the units are restricted to income-eligible households. The property must be subject to deed restrictions that require the owner to keep rents affordable for a minimum of 5 years. <sup>13</sup>
<b>Projects Eligible for Financing</b>	Financing limited to energy efficiency improvements/projects		At least 70% of the financed amount must be Energy Saving Measures+ or demand response. Up to 30% of the financed amount may fund nonenergy efficiency improvements. Financing for distributed generation (DG) improvements like solar photovoltaic (PV) may be included but will not receive a credit enhancement. <sup>14</sup>

<sup>13</sup> Please see the CAEFTA sponsored Gogreenfinancing website at <https://gogreenfinancing.com/multifamily>

<sup>14</sup> Ibid.

<b>Source of funds for administration</b>	Ratepayer funding	Ratepayer funding	Ratepayer funding
<b>Source of funds leveraged for loan loss reserve</b>	Ratepayer funding	Ratepayer funding	Ratepayer funding
<b>Source of funds leveraged for financing</b>	Private Capital	Private capital	Private capital
<b>Statewide/Local</b>	Local	Statewide	Statewide
<b>Partner Organization</b>	County of Los Angeles	California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA, a subdivision of the California Treasurer's office serving as the pilots' administrator)	California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA, a subdivision of the California Treasurer's office serving as the pilots' administrator)

**3. Comparable SCE and SoCalGas Finance Program – New Finance Offerings [SCE-13-SW-007C] [SCG3737]**

The IOUs, along with the California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA), a subdivision of the California Treasurer's office serving as the pilots' administrator, have developed SW financing pilot programs that do the following:

- Offer scalable and leveraged financing products.
- Test market incentives for attracting private capital through investment of ratepayer

funds.

- Test whether payment via the utility bill ("on-bill repayment") increases debt service performance across market sectors.

The Residential Energy Efficiency Loan (REEL) Assistance Program (formerly known as the Single Family Loan Program), the first of these California Hub for EE Financing (CHEEF) Pilot Programs to launch, offers a loan loss reserve to mitigate lender risk in providing access to financing for residential EE projects in IOU service territories. The affordable Multifamily Financing Program allows qualified property owners to finance up to \$5 million for EE retrofits. Ratepayer funds provides credit enhancements on the first \$1 million financed.

#### **4. Coordination Protocol Between Programs**

SoCalREN, SCE, and SoCalGas program teams will leverage the monthly multifamily check-in calls to allow for notice of marketing campaigns, continued coordination, discussion of any issues impacting the programs, and to learn about updates of other programs (i.e., financing) that could benefit financed EE projects. These calls will also be utilized to identify any overlaps and mitigate customer confusion.

#### **5. Coordination Between SW Program (s)**

The Joint PAs will continue to coordinate with the SW implemented financing programs so that customers are provided all possible EE financing options. In addition, the Joint PAs will leverage lessons learned from SW implemented financing programs and provide feedback in public meetings held by the SW implementer for EE financing programs, California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA).

Additionally, SoCalREN has set up quarterly meetings with the SW implementer for EE financing programs, CAEATFA will share best practices and ensure no efforts are duplicative as well as coordinate how product finance offerings can be marketed alongside each other within the SoCalREN territory.

**6. Compliance With D.12-11-015, SCR-FIN-C2**

The following table describes in further detail how SoCalREN’s Residential LLR Program satisfies the REN criteria in D.12-11-015.

**Table 22: SoCalREN’s 2021 Residential LLR Program Compliance with D.12-11-015**

REN Criteria	SoCalREN Residential LLR Program (SCR-FIN-C2)
1. Activities IOU cannot or does not intend to undertake	
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	Provides all multifamily property owners financing opportunities. Current, SW IOU programs are limited to affordable multifamily properties.
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	Designed to support upgrades of multifamily properties and facilities with an emphasis on prioritizing projects that serve hard-to-reach customers and DACs.

**H. SOCALREN WORKFORCE EDUCATION & TRAINING, (SCR-WET-D1)**

SoCalREN has historically utilized policies and instruments for local hiring and workforce partnerships while developing infrastructure for minority contractors to access clean energy investments. SoCalREN’s WE&T Program offerings now emphasize a robust regional workforce education and training approach that supports underserved Disadvantaged Workers (DAW) and women, minority and disabled veteran owned business enterprises (WMDVBE). The primary goal of this Program is to provide the ability to build capacity within the EE industry with a local regional approach. Similar to its other non-resource programs, the SoCalREN WE&T Program leverages public agencies to reach and engage communities while simultaneously building its underserved workforce, thus providing long term workforce supply in the EE industry.

The SoCalREN WE&T Program provides: 1) comprehensive regional workforce education, training and resources for DAWs and WMDVBE contractors of all skill levels; 2) entry-level workforce skills training for youths; 3) WMDVBE contractors local government public agency

training in regards to sustainability projects RFPs; and 4) a green career pathway for classified homeless individuals, such as transition at-risk youth.

**1. Summary of Program Objectives**

- a) Increase Southern California regional workforce and training infrastructure/partnerships, comprising community-based training organizations, K–12 and higher educational institutions, apprenticeship programs, and workforce investment boards; increase the quantity and skills of entry-level and incumbent workers in all levels of the demand-side management (DSM) and EE industry.
- b) Increase entry-level skills training and job opportunities for disadvantaged workers.
- c) Develop a regional energy management training program to increase the operational efficiencies of EE retrofit projects.
- d) Standardize local contracting policies and protocols into public bid/solicitation documents across the SoCalREN region to increase capacity and the participation of diverse, small, and disabled veteran–owned businesses in EE work.
- e) To leverage existing education offerings that provide training and certification support for individuals classified as homeless.
- f) To provide a pathway to a career in the EE marketplace through direct partnerships that assist individuals receive on-the-job training as well as job obtainment support.

**2. Summary of Program Differentiation**

The following table summarizes the PAs’ WE&T Programs.

**Table 23: SoCalREN, SCE, and SoCalGas WE&T Programs Summary**

<b>Program Parameters</b>	<b>SoCalREN WE&amp;T (SCR-WET-D1)</b>	<b>SCE WE&amp;T Integrated Energy Education &amp; Training Program – [SCE-13-SW-010A]</b>	<b>SoCalGas WE&amp;T Integrated Energy Efficiency Training (IET) [SCG3729]</b>
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<b>Target Audience (s)</b>	<ul style="list-style-type: none"> <li>Architects, designers, engineers, contractors, building operators, technicians, craft/tradesmen, customers, youth, classified disadvantaged workers, and building owners</li> <li>WMDVBE that can potentially support IOU resource program sectors and local public agencies sustainability projects.</li> <li>Homeless (i.e. at-risk transition youth)</li> </ul>	Occupations supporting IOU resource program sectors.	Workers in or pursuing occupations that can provide professional and technical capabilities needed by IOU resource program sectors.
<b>Resource or Non-Resource</b>	Non-resource	Non-resource	Non-resource
<b>Eligible Measures</b>	N/A	N/A	N/A
<b>Budget<sup>15</sup></b>	\$650,000	\$4,700,000	\$2,808,149

SoCalREN’s WE&T Program differs from the IOU WE&T programs by focusing all its WE&T resources on (1) entry-level workforce skills training infrastructure; (2) WMDVBE contractor training;(3) youths; and (4) homeless (i.e. at-risk transition youth) so that these segments are enabled with pathways and training for certifications and credentials in energy-related industries.

The following table compares the key program parameters of the PAs’ WE&T Programs.

**Table 24: WE&T Program Comparison**

<b>Program Parameters</b>	<b>SoCalREN WE&amp;T</b>	<b>SCE WE&amp;T Integrated Energy Education &amp; Training Program</b>	<b>SoCalGas WE&amp;T Integrate Energy Education Training Program</b>
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<sup>15</sup> The budgets provided herein are estimates. Final 2021 budgets will be provided in the PAs’ Annual Budget Advice Letters that will be filed on September 1, 2020.

<b>Target Audience</b>	<ul style="list-style-type: none"> <li>• Targets the most underserved and disadvantaged workers (DAW) -</li> <li>• WMDVBE that can potentially support IOU resource program sectors and local public agencies sustainability projects.</li> <li>• Homeless (i.e. at-risk transition youth)</li> </ul>	Occupations supporting IOU resource program sectors.	Workers and occupations supporting IOU resource program sectors.
<b>Location of Training</b>	<ul style="list-style-type: none"> <li>• Through local public agency training channels</li> <li>• In field and online</li> </ul>	Training will be conducted at Energy Center, alternative training sites, and through other distribution channels, in collaboration with industry and other training providers, as appropriate, for reaching target audiences.	Training to be conducted at SoCalGas' Energy Resource Center, alternative training sites, and through other distribution channels, in collaboration with industry and other training providers, as appropriate, for reaching target audiences.
<b>Training Types</b>	In-Person/online	In-person/online	In-person/online
<b>Statewide/Local</b>	Local	Statewide/local	Statewide/local
<b>Partner Organization</b>	<ul style="list-style-type: none"> <li>• Public Agencies</li> <li>• Nonprofit organizations</li> <li>• High schools</li> <li>• Community Colleges</li> <li>• Unions</li> <li>• 3<sup>rd</sup> party implementers</li> <li>• Workforce centers</li> </ul>	Other IOUs, industry associations, post-secondary education, business networks, regional workforce services, and potential collaborators with common objectives of addressing EE workforce needs	Other IOUs, industry associations, post-secondary education, business networks, regional workforce services, and potential collaborators with common objectives of addressing EE workforce needs

### 3. Comparable SoCalGas WE&T Program –SoCalGas WE&T Integrated Energy Efficiency Training (IEET) – [SCG3729]

The SoCalGas WE&T Integrated Energy Efficiency Training (IEET) subprogram (formerly

Centergies) offers both technical and foodservice workforce trainings that can leverage SoCalREN local contacts to inform and equip workforce talent with skills to assist in meeting the State’s energy and climate goals.

The WE&T Program contributes to the IOUs’ EE goals by empowering customers and market actors with the knowledge to make energy reduction decisions. WE&T’s primary target audience includes market actors who design, build, maintain, and operate buildings and building systems—engineers, technicians, building operators, designers, contractors, etc. Additionally, WE&T supports post-secondary institutions who are training future generations of the energy workforce by providing them with energy efficiency, sustainability, and green career awareness materials and resources. Because these market actors have the potential to shape a building’s energy use, WE&T teaches them how to recognize energy savings and GHG-reduction opportunities, and then provides them with the skills, tools, and resources to act upon those opportunities.

#### **4. Comparable SCE WE&T Program – Integrated Energy Education & Training Program – [SCE-13-SW-010A]**

The SCE Workforce WE&T Integrated Energy Education & Training Program (formerly Centergies), offers resources to help shape the future energy workforce through occupational, employer, and technology focused workshops and seminars, along with workplace-based hands-on technical training. These programs aim to provide pathways and training for certifications and credentials in energy-related industries.

In addition to the training courses offered, the Foodservice Technology Center conducts standards-based equipment testing and evaluation that enhance commercialization of emerging energy efficient technologies and programs. These services are delivered with technical integrity and scientific rigor in order to ensure our partners stay competitive and maintain cost effectiveness.

The Energy Centers provide a host of other value-added customer programs and services such as the Tool Lending Library, tours, and on-site energy audits at no-cost to the customer.

SCE has applied for the IEET program to be funded through the Income Qualified Application for 2021

and beyond.<sup>16</sup> However, the coordination between PA’s will continue regardless of funding source.

### **5. Coordination Protocol Between REN and IOU Programs**

Partnering is key to SoCalREN’s intervention strategies, specifically the efforts related to WE&T. In 2013, a Workforce Advisory Committee and Small Business Advisory Committee were formed to create the framework for a collaboration and partnership that would enable SoCalREN to address barriers to education and training for entry- and mid-level workers, as well as competition and skills training for diverse SBE and DVBE firms. These partnership collaborations include labor, industry associations, community-based organizations, community colleges, utilities, and participating agencies. An expansion of these partnerships is ongoing to facilitate regional access as well as access within local communities.

In addition, SoCalREN, SCE, and SoCalGas have regular coordination calls so that strategies and tactics can be cross-leveraged and support the core activities the Joint PAs have to offer. This monthly coordination also helps to ensure that all constituents served by WE&T programs in the shared service territory are properly covered and receive the optimal level of WE&T opportunities.

### **6. Coordination Between SW Program(s)**

The IOU partners will coordinate with organizations that offer soft skills training and workforce development support as part of the SW Career and Workforce Readiness (CWR) Program in 2021. This Program will also be leveraged by SoCalREN to support the core WE&T activities of SoCalREN. In addition, the IOU local Integrated EE Training post-secondary program component can be leveraged to collaborate with post-secondary and similarly positioned education and training entities to increase the quantity and competency of all workers at all levels of EE industry sectors.

### **7. Compliance With D.12-11-015, SCR-WE&T-D1**

The following table describes in further detail how SoCalREN’s WE&T Program satisfies the REN criteria in D.12-11-015.

**Table 25: SoCalREN’s 2021 WE&T Program Compliance with D.12-11-015**

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<sup>16</sup> A-19-11-003 - SCE ESA and CARE Application Testimony-SCE-04

REN Criteria	SoCalREN WE&T Program (SCR-WE&T-D1)
1. Activities IOU cannot or does not intend to undertake	<ul style="list-style-type: none"> <li>Provides local government agency RFP solicitation training for WMDVBE contractors enabling these small underserved enterprises to participate in government funded EE and sustainability projects.</li> </ul>
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	<ul style="list-style-type: none"> <li>Provide pathways and training for certifications and credentials in energy-related industries for youths and homeless (transition at-risk youths).</li> </ul>
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	<ul style="list-style-type: none"> <li>An organized, comprehensive regional workforce education and training partnership and resource network solely for disadvantaged workers and contractors at all skill levels.</li> <li>Entry-level workforce skills training infrastructure that solely emphasizes assisting youths and WMDVBE.</li> <li>A DBE/WBE/DVBE contractor training program.</li> </ul>

**I. SMALL COMMERCIAL PLACEHOLDER - SOCALREN HEALTHY STORES REFRIGERATION ENERGY EFFICIENCY PROGRAM, (SCR-COM-E1)**

The SoCalREN Healthy Stores Refrigeration (HSREE) Program will assist funding EE units in corner stores and small businesses in food deserts throughout the region of County of Los Angeles and its surrounding Counties. In addition, this Program will leverage Utility partner EE small business programs that will couple additional EE upgrades such as lighting and food service equipment.

The Program will additionally seek out through its utility partner programs “no cost” EE resources to be offered, including:

- Energy audits
- Technical consultation
- Deemed and direct install rebates for other applicable small commercial grocer EE upgrades
- Technical assistance and reviews on projects

- Provide education and outreach regarding the benefits of healthy food options and EE

The purpose of this Program will be to improve access to healthy food choices in the small retail environment for underserved and disadvantaged communities while simultaneously reducing energy usage and GHG emissions.

This Program is proposed to be piloted over multiple years, 2020-2021.

The Program will target corner stores and or small businesses located throughout the 12 SoCalREN Counties and will only be eligible to properties in low-income neighborhoods and DAC based on the definitions below.

1. Corner stores: a small-scale store or grocery store, either independent or chain, that sells a limited selection of foods and other products and that is located in a food desert in a rural, urban or suburban area. Corner stores do not need to be located on street corners.
  - a) Food desert: a low-income census tract with low access to a full-service grocery store.
2. Small business grocers: independently owned, with 100 or fewer employees, average annual gross receipts of \$15M or less and must be authorized to accept EBT/SNAP/CalFresh benefits.

The following placeholder regarding SoCalREN’s proposed Small Commercial Program is provided for informative and near-term coordination purposes. Pursuant to D.18-05-041, new programs are subject to Commission Advice Letter approval and must be included for consideration in Program Administrators Annual Budget Advice Letter filings. SoCalREN has will file a Tier 2 Advice Letter [AL #12-E-G] on *(June 30, 2020)* proposing the Small Commercial program for Commission consideration and approval.<sup>17</sup>

### **3. Summary of Program Objectives**

- Address the current challenges that exist within food deserts.
- Reduce GHG emissions while simultaneously promoting offerings for healthy food options within low-income and disadvantage communities.
- To provide education, outreach and support to small commercial businesses regarding EE upgrades and the benefits for offering healthy food options.

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<sup>17</sup> Advice Letter #12-G-E: SoCalREN’s Request for Authority to Administer a Healthy Stores Refrigeration (HSREE) Program

- To assist small commercial businesses overcome common barriers within their EE segment:
  - lack awareness and knowledge of EE benefits and how to make use of the utility programs
- To capture all or most savings potential in one initial transaction.

#### 4. Summary of Program Differentiation

The following table summarizes the PAs’ small commercial grocer and corner store programs.

**Table 26. SoCalREN, SCE, and SoCalGas Small Commercial Grocer Programs Summary**

<b>Program Parameters</b>	<b>SoCalREN HSREE (SCR-COM-E1)</b>	<b>SCE Commercial Core Offerings (SCE-13-SW-002, SCE-13-TP-027)</b>	<b>SoCalGas Commercial Energy Efficiency Rebate Programs SCG-3805, 3711, 3716, 3720, 3793, 3814, 3816</b>
<b>Target Audience (s)</b>	Corner stores and small grocers located in food deserts and DACs	All commercial customers	All eligible non-residential customers within SoCalGas service territory
<b>Resource or Non-Resource</b>	Resource	Resource	Resource
<b>Eligible Measures</b>	Refrigeration	Lighting, Pumping, HVAC, Process, Food Service, Whole Building, Motors, Office Equipment, Building Envelope, Refrigeration	Conduct on-site audit to determine program and measure installation options and eligibility of gas--fired EE equipment or controls offered in the DEEMED or Commercial Rebate Programs.
<b>Budget<sup>18</sup></b>	\$500,000 (CPUC funding)  \$1,400,000 (Non-CPUC funding)	\$19,300,000 <sup>19</sup>	\$XXX

SoCalREN’s small commercial HSREE Program differs from the IOU small

<sup>18</sup> The budgets provided herein are estimates. Final 2021 budgets will be provided in the PAs’ Annual Budget Advice Letters that will be filed on September 1, 2020.

<sup>19</sup> Budget includes all Commercial Core Programs (including Energy Advisor, Calculated, Deemed, Non-Residential HVAC, Savings By Design, and Midstream Point of Purchase). This does not include commercial third party programs.

commercial programs by focusing all its resources on (1) corner stores and small grocers located in food deserts; (2) small commercial businesses that offer healthy food options to be eligible for program incentives; and (3) utilizes external non-CPUC funding to provide incentives.

The following table compares the key program parameters of the PAs’ small commercial grocer and corner store Programs.

**Table 27: Small Commercial Corner Stores and Grocers Program Comparison**

Program Parameters	SCR HSREE Program	SCE Core Programs	SoCalGas Direct Install
<b>Project Delivery Model</b>	<ul style="list-style-type: none"> <li>• Offers 100% full rebate incentive on Small to medium Commercial Refrigeration Units installed</li> <li>• Leverages IOU small commercial programs for energy audits and technical assistance</li> </ul>	<ul style="list-style-type: none"> <li>• Downstream</li> <li>• Midstream</li> <li>• Upstream</li> </ul>	To reduce financial barriers by providing direct installation measures, incentives, and financing options for EE retrofit equipment. Conduct onsite audits to determine program and measure installation options and eligibility. Leverage DEEMED Downstream or Midstream/POS programs.



<b>Project Measures Incentivized</b>	<ul style="list-style-type: none"> <li>• Small to medium Commercial Refrigeration Units only;</li> <li>• Eligible products must be EnergyStar certified or within California Energy Commission's (CEC) Title 24 energy efficiency compliance standards. Products that are EnergyStar certified or within energy efficiency Title 24 compliance with the lowest global warming potential (GWP) will be prioritized for</li> </ul>	<ul style="list-style-type: none"> <li>• Lighting, Pumping, HVAC, Process, Food Service, Whole Building, Motors, Office Equipment, Building Envelope, Refrigeration</li> </ul>	Direct Install - Pre-rinse Spray Valves, Aerators, Pipe and Tank Insulation, Showerheads, Commercial Fittings, Laminar Flow Restrictors.  Comprehensive Direct Install (co-pay) – Foodservice equipment, Dishwashing Equipment, Commercial Hot Water Boiler, Tankless Water Heater, Storage Water Heater.
<b>Incentive Eligibility Requirements</b>	Must offer a minimum of 1 category of healthy food options (i.e. fresh produce, healthy grains)	All commercial customers	All eligible nonresident customers
<b>Deemed vs Calculated</b>	Deemed	Deemed and Calculated	Deemed
<b>Funding</b>	EE Funds (Admin, ME&)  CDF&A grant funding for Incentives	EE Funds	Refundable

### 5. Comparable SCE Commercial Program – Custom, Deemed, Midstream, and Upstream – [SCE-13-SW-010A]

SCE's commercial sector offers SCE's EE customized, deemed, midstream, and upstream programs to all customers, regardless of size or energy use and can be paired with SCE in-house technical assistance to assist customers with site audits, project development, and creating project feasibility studies, among other services.

SCE is in active solicitation for commercial program offerings. Programs will be contracted by Sept 30, 2020 to begin implementation in 2021. While SCE does not yet know the composition of these programs, SCE will continue to work with 3C-REN to coordinate activities. Both third-party implemented programs and SCE in-house programs and services are offered at no

cost to the customer.

## **6. Comparable SoCalGas Commercial Program – Direct Install, DEEMED and Point-of-Sale Midstream**

The Commercial Direct Install Program delivers no-cost or low-cost EE equipment retrofits to small and medium-sized commercial businesses throughout SoCalGas' service territory. The retrofits are to be completed through installation contractors to reduce energy and water usage, resulting in resource savings for public and private commercial customers. The Program targets these customers in a staged delivery approach that provides program services in specific geographic areas allowing for a more concentrated, directed, and comprehensive program.

SoCalGas is actively conducting commercial solicitations for both local and statewide programs. SoCalGas expects the new local third-party commercial programs to be launched by quarter four of 2020 and Statewide Point-of-Sale Foodservice and Midstream Water Heating programs by first quarter of 2021.

### **1. Coordination Protocol Between Programs**

A focus on collaboration of the PAs is critical to this Program's successes. The SoCalREN plans to implement monthly project coordination meetings specifically with its partner IOU Program's small commercial teams to maximize the available resources for each Program participant. The Program will be leveraging a multitude of offerings and services thus requires deep collaboration and coordination protocols so that each participant receives all available incentives and non-resource tactics the IOUs currently offer. SoCalREN will work with its IOU partners to draft a coordination strategy similar to "SoCalREN, SCE, SoCalGas Coordination Strategy for Public Agencies" so that well established communication regarding projects protocols are put in place.

Additionally, the Joint PAs will participate in Energy Division-led Program Coordination Groups (PCG), with the goal of reaffirming clearly defined program goals and messaging.

### **2. Coordination Between SW Program(s)**

The Joint PAs will continue to participate in ED-led PCGs. The SW PCG for commercial programs enables collaborative SW discussions regarding all commercial programs across all PAs

throughout the state, not just those in Southern California.

**3. Compliance With D.12-11-015, SCR-COM-E1**

The following table describes in further detail how SoCalREN’s Small Commercial HSREE

Program satisfies the REN criteria in D.12-11-015.

REN Criteria	SoCalREN HSREE Program (SCR-WE&T- E1)
1. Activities IOU cannot or does not intend to undertake	<ul style="list-style-type: none"> <li>This program specifically targets food deserts within DACs;</li> </ul>
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	<ul style="list-style-type: none"> <li>This program offers refrigerant unit incentives only with the requirement that a healthy food option be included in the small commercial corner and grocer store’s offerings to its customers.</li> </ul>
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	<ul style="list-style-type: none"> <li>This is targeted to low income HTR food deserts and DACs only;</li> </ul>

**III. SOCALREN PROGRAM COMPLIANCE WITH D.12-11-015 AND D.19-12-021**

In D.12-11-015 and reaffirmed in D.19-12-021, the CPUC directed the RENs to

deliver programs and activities that met a threshold of criteria:<sup>20,21,22</sup>

- Activities that utilities or CCAs cannot or do not intend to undertake.
- Pilot activities where there is no current utility or CCA Program offering, and where there is potential for scalability to a broader geographic reach, if successful.
- Pilot activities in HTR markets, whether or not there is a current utility or CCA Program that may overlap.

SoCalREN has exercised the power of governments to leverage alternative funding,

<sup>20</sup> D.12-11-015, p. 17.

<sup>21</sup> D.19-12-021, p. 32.

<sup>22</sup> D.16-08-019, pp. 11-12.

community networks, and other government programs to enhance portfolio capacity, particularly in support of programs that fill gaps or represent scalable offerings. SoCalREN will continue to utilize this “peer driven” approach to leverage public agencies, with a focus on serving HTR and DACs in both its Public and Residential Sectors while maintaining a path to increased cost efficiency. SoCalREN’s services will continue to complement and supplement IOU programs and fill gaps and find synergies among approaches to maximize opportunities for customers and other market actors, which is in line with all the objectives laid out in D.12-11-015, D.16-08-019 and reaffirmed in D.19-12-021.

**A. SOCALREN UNDERTAKING ACTIVITIES THAT UTILITIES CANNOT OR DO NOT INTEND TO UNDERTAKE.**

Regional Energy Networks (RENs) possess relationships with customers that other administrators (including utilities and potential SW administrators). As a peer-driven organization, SoCalREN’s portfolio utilizes its local expertise and direct relationship networks to quickly survey the market in which they serve and undertake activities that IOUs cannot or do not intend to undertake, in other words “RENs fill the Gap”.

Since the inception of SoCalREN, these activities have been developed based on market needs, lessons learned from historical IOU programs and peer-to-peer sharing which has brought innovation at a small replicable scale. Table 28 describes in detail many, but not all, the activities and strategies to be implemented in 2021 that “fill the gap” and define SoCalREN’s unique value.

SOCALREN PROGRAM	GAP	STRATEGY
EE PD Program	<ul style="list-style-type: none"> <li>• Local government partnerships diminished or eliminated</li> <li>• No full scale one stop shop services for the entire project</li> </ul>	<ul style="list-style-type: none"> <li>➤ Regional Partnerships</li> <li>➤ Full scale project services offered from project inception to project close out – at no cost to public agencies; Details</li> </ul>

	delivery path for all public agencies	provided in EE PDP section
DER DAC PD Program	<ul style="list-style-type: none"> <li>• Comprehensive DER audits not available through EE portfolio</li> </ul>	<ul style="list-style-type: none"> <li>➤ Full Scale project services offered which include DER audits and DER technical services</li> </ul>
Public Agency RLF	<ul style="list-style-type: none"> <li>• No short-term construction financing offered for public agencies</li> </ul>	<ul style="list-style-type: none"> <li>➤ Short term 0% interest loan for public agency EE projects</li> </ul>
Residential Community Coordinator (RCC)	<ul style="list-style-type: none"> <li>• No SPOC offerings for non-primary English-speaking small MF property owners</li> </ul>	<ul style="list-style-type: none"> <li>➤ Leverages public agency energy champions/leaders to engage the HTR</li> <li>➤ A multi-language SPOC offered throughout the entire project path that assist small MF property owners</li> </ul>
Multifamily Program	<ul style="list-style-type: none"> <li>• Currently no regional electric Multifamily whole building retrofits offering</li> </ul>	<ul style="list-style-type: none"> <li>➤ Whole building electric and gas measure retrofits offered</li> </ul>
WE&T Program	<ul style="list-style-type: none"> <li>• No local workforce offering for homeless and DAWs</li> <li>• No training offered to assist WMDVBE's participate in public agency EE project RFPs</li> </ul>	<ul style="list-style-type: none"> <li>➤ Workforce offering that provides certified pathways for homeless and DAWs</li> <li>➤ Full service training offered to assist WMDVBE's in public agency EE project RFPs</li> </ul>
HSREE Program	<ul style="list-style-type: none"> <li>• No EE offerings that target Small Commercial Bodegas in food deserts</li> </ul>	<ul style="list-style-type: none"> <li>➤ Offering EE refrigeration retrofits for small commercial bodegas that promote that offer healthy food options in food deserts and DACs</li> </ul>

SoCalREN's RCC Program utilizes resources and local expertise to leverage local government agencies' housing and community development programs and community-based organizations, programs not currently offered by the IOUs. SoCalREN will also organize events based on these government agencies' relationships, that explain multifamily property EE upgrade benefits and connect community property owners and their residents with the education and resources needed to take action.

In addition, the SoCalREN public agencies offerings successfully complement and supplement the activities of existing LGP programs, as well as other Public Sector EE programs administered by partner utilities, SCE, and SoCalGas. Public agencies face unique challenges and barriers that include limited technical resources to identify, develop, and implement projects; inadequate and limited access to data about building performance; financing hurdles; unique procurement requirements; protracted decision-making processes; and managing within a political environment, among others.

SoCalREN's Public Agency EE PDP, DER DAC PDP, and NMEC Program aim to address these unique challenges and provide the necessary services different from or not currently offered by IOU programs for public agencies.

**B. SOCALREN UNDERTAKING PILOTS ACTIVITIES WHERE THERE IS NO CURRENT UTILITY UNDERTAKING, AND WHERE THERE IS A POTENTIAL FOR SCALABILITY TO A BROADER GEOGRAPHIC REACH, IF SUCCESSFUL.**

The SoCalREN strategies for its 2021 portfolio strive to enhance cross-cutting activities, collaboration and leverage with the IOUs; but to also adjust and reform its overall program portfolio, consistent with and in furtherance of the Commission's mandate for RENs to pilot new approaches and models that are scalable and replicable (D. 12-11-015).

These approaches include:

- Public Agency Revolving Loan Fund – short-term construction financing [no current utility undertaking].
- Residential Community Coordinator – public sector coordinator targeting multifamily property owners and upgrade education & outreach at a community not individual level [no current utility undertaking].
- Public Agency NMEC Program – NMEC Program for public agencies with no rebate incentives and includes exterior lighting measures [different from current utility undertaking].
- DER DAC Program – comprehensive program that offers technical assistance and DER energy audits alongside EE project implementation.
- Workforce Education & Training Program – targets homeless (specifically transition at -risk youth) and provides a certified career path to the EE

- industry.
- HSREE Program – offer EE refrigeration retro-fits to food deserts to assist healthy food option offerings in DACs.

These approaches currently are different from or not offered by SoCalREN’s IOU partners but do have the potential to be scaled and replicated if proven successful.

SoCalREN’s 2021 Portfolio meets the criteria outlined in D.12-11-015 and D.19-12-021 by utilizing strategies intended to be unique, scalable, and cost-effective, with the potential to be long term.

**C. SOCALREN UNDERTAKING PILOT ACTIVITIES IN HARD-TO-REACH MARKETS, WHETHER OR NOT THERE IS A CURRENT UTILITY PROGRAM THAT MAY OVERLAP.**

A primary objective for all SoCalREN strategies is to meet the needs of HTR markets and DACs. As a PA managed by a local government, SoCalREN has an inherent duty to serve HTR markets and DACs. Regional government PAs are well-suited to address HTR markets and DACs, through deployment of independent yet parallel programs, initiatives, and actions specifically developed to respond to underserved constituents. As a result, the SoCalREN can cross-cut EE programs onto a number of pre-existing government frameworks specifically designed for underserved and DACs, reducing administrative, development, and other costs.

SoCalREN’s Multifamily Program will work in parallel with its RCC to build relationships among its HTR constituents, such as multifamily property owners whose primary language is not English and who currently own properties in DACs. Public agency relationships will help to gain trust and confidence in REN offerings as well as their IOU partner program offerings. Building trust will in turn help these HTR constituents understand the value proposition of EE.

According to the U.S. Department of Agriculture, food deserts are defined as areas

devoid of fresh fruit, vegetables and other healthful whole foods, largely due to a lack of grocery stores, farmers' markets and healthy food providers. All food deserts are located in DACs and HTR communities and residents typically categorized as low-income. There does exist a variety of programs that assist corner stores to help them become healthy food outlets however, there is no program that couple sustainability and healthy food transformation for these corner stores thus not providing the other challenge faced by these same communities, environmental equity. The HSREE Program will target food deserts within DACs and HTR (geographically rural) and assist small corner stores implement EE refrigeration retrofits while providing education and outreach regarding incorporating healthy food options to the corner stores offerings.

In addition, SoCalREN's WE&T Program market focus emphasizes tactics that reach the most under-represented disadvantaged populations currently in the EE industry, specifically Women Minority Disabled Veteran Business Enterprises (WMDVBE), youths and homeless. Through public agency and community engagement, SoCalREN will continue to identify and establish pathways for entry-level skills training through a network of public and non-profit training programs.

SoCalREN has structured its portfolio strategies to be administratively cost-efficient, with a focus on regional government capacities and systems already in-place to address HTR markets and DACs. These existing custom systems and capacities will further enable and support the State's EE Portfolio goals for the under-served and DACs through the rigorous deployment by REN PAs.



**APPENDIX A: SUMMARY OF SOCALREN PROGRAM COMPLIANCE WITH D.12-11-015**

**Table A-1. SoCalREN D. 12-11-015 Compliance, by Program**

<b>Check D.12-11-015 Threshold Criteria that apply for each program</b>	<b>Comparable IOU Program, if applicable</b>	<b>1. Activities that utilities cannot or do not intend to undertake.</b>	<b>2. Pilot activities where there is no current offering, and where there is potential for scalability to a broader geographic reach, if successful.</b>	<b>3. Pilot activities in hard to reach markets, whether or not there is a current utility program that may overlap.</b>
<b>Multifamily Program [SCR-RES-A1]</b>	SCE Multifamily Energy Efficiency Rebate Program [SCE-13-SW-001C]  SoCalGas Home Upgrade Program – SoCalGas Multifamily Upgrade [SCG3705]	XX		XX
<b>Residential Community Coordinator [SCR-RES-A2]</b>	Not Applicable	XX	XX	XX
<b>Energy Efficiency Project Delivery Program [SCR-PUBL-B1]</b>	SCE Energy Leader Partnership Program [SCE-13-L-002Rollup] <sup>20</sup>  SoCalGas Government Partnership Programs <sup>21</sup>	XX		

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<sup>20</sup> This includes all SCE partnership programs with local governments.

<sup>21</sup> This includes all SoCalGas partnership programs with local governments.

Check D.12-11-015 Threshold Criteria that apply for each program	Comparable IOU Program, if applicable	1. Activities that utilities cannot or do not intend to undertake.	2. Pilot activities where there is no current offering, and where there is potential for scalability to a broader geographic reach, if successful.	3. Pilot activities in hard to reach markets, whether or not there is a current utility program that may overlap.
<b>DER DAC Project Delivery Program [SCR-PUBL-B2]</b>	Not Applicable	XX	XX	XX
<b>Public Agency NMEC Program [SCR-PUBL-B3]</b>	SCE Public Sector Performance-Based Retrofit High Opportunity Program [SCE-13-L-0031]  SoCalGas High Opportunity Projects and Programs - Metered and Performance-Based Retrofits (MPBR) Program	XX	XX	XX
<b>Public Agency Revolving Loan Fund [SCR-FIN-C1]</b>	SCE Statewide Finance Program – On-Bill Financing [SCE-13-SW-007A]  SoCalGas Statewide Finance Program – New Financing Offerings [SCG3737]	XX	XX	
<b>Residential Loan Loss Reserve [SCR-FIN-C2]</b>	SCE New Financing Offerings [SCE-13-SW-007C]  SoCalGas New Financing Offerings – Residential Energy Efficiency Loan (REEL) [SCG3737]		XX	XX

Check D.12-11-015 Threshold Criteria that apply for each program	Comparable IOU Program, if applicable	1. Activities that utilities cannot or do not intend to undertake.	2. Pilot activities where there is no current offering, and where there is potential for scalability to a broader geographic reach, if successful.	3. Pilot activities in hard to reach markets, whether or not there is a current utility program that may overlap.
<b>Workforce Education &amp; Training [SCR-WET-D1]</b>	SCE WE&T Integrated Energy Education & Training Program [SCE-13-SW-010A]  SoCalGas' WE&T Integrated Energy Education Training Program [SCG3729]	<b>XX</b>	<b>XX</b>	<b>XX</b>
<b>HSREE Program (SCR-COM- E1)</b>	SCE Commercial Core Offerings (SCE-13-SW-002, SCE-13-TP-027)	<b>XX</b>	<b>XX</b>	<b>XX</b>

**APPENDIX B: SOCALREN SUMMARY OF PROGRAMS OFFERED FOR 2019**

**Table B-1. SoCalREN Summary of Programs, 2021**

<b>REN Program Unique ID</b>	<b>Sector</b>	<b>Annual Budget</b>	<b>Eligible Measures</b>
<b>Multifamily Program [SCR-RES-A1]</b>	Residential	\$ 6,644,000	Resource program.
<b>Residential Community Coordinator [SCR-RES-A2]</b>	Residential	\$ 500,000	Not applicable. Non-resource program
<b>Energy Efficiency Project Delivery Program [SCR-PUBL-B1]</b>	Public	\$ 7,150,000	Not applicable. Non-resource program
<b>DER DAC Project Delivery Program [SCR-PUBL-B2]</b>	Public	\$ 1,550,000	Not applicable. Non-resource program
<b>Public Agency NMEC Program [SCR-PUBL-B3]</b>	Public	\$ 2,615,000	CMPA process
<b>Public Agency Revolving Loan Fund [SCR-FIN-C1]</b>	Cross-cutting: Financing	\$ 500,000	Not applicable. Non-resource program
<b>Loan Loss Reserve [SCR-FIN-C2]</b>	Cross-cutting: Financing		Not applicable. Non-resource program
<b>Workforce Education &amp; Training [SCR-WET-D1]</b>	Cross-cutting: WE&T	\$ 650,000	Not applicable. Non-resource program
<b>SoCalREN HSREE Program (SCR-COM- E1)</b>	Commercial	\$ 500,000	Resource program

**APPENDIX C: SCE AND SOCALGAS SUMMARY OF COMPARABLE PROGRAMS**

**Table C-1. SCE Summary of Comparable 2021 programs**

<b>IOU Program Unique ID</b>	<b>Sector</b>	<b>Annual Budget</b>	<b>Eligible Measures<sup>23</sup></b>
<b>Multifamily Energy Efficiency Rebate Program [SCE-13-SW-001C]</b>	Residential	\$10,000,000	Lighting, HVAC technologies, and appliances
<b>Statewide Finance Program – On-Bill Financing [SCE-13-SW-007A]</b>	Cross-cutting: Financing	\$800,000 (implementation budget) \$17,000,000 (total loan pool)	Not applicable.
<b>New Financing Offerings [SCE-13-SW-007C]</b>	Cross-cutting: Financing	\$100,000	Not applicable. Non-resource program
<b>Local Government Partnership Programs</b>  <b>Note: Includes all subprogram partnerships &amp; Water Infrastructure Systems EE Program</b>	Public	\$7,600,000	Lighting, Pumping, HVAC, Process, Food Service, Whole Building, Motors, Office Equipment, Building Envelope, Refrigeration <sup>24</sup>
<b>Public Sector Performance-Based Retrofit High Opportunity Program [SCE-13-L-0031]</b>	Public	\$500,000	CMPA process
<b>WE&amp;T Integrated Energy Education &amp; Training Program [SCE-13-SW-010A]</b>	Cross-cutting: WE&T	\$4,600,000	Not applicable. Non-resource program

<sup>23</sup> For up-to-date program information and detailed measures list for the multifamily rebate program, please visit: <https://www.sce.com/wps/portal/home/residential/rebates-savings/multifamily-rebate-program/>

<sup>24</sup> For up-to-date program information and detailed measures list for Public Sector programs, please visit: <https://www.sceonlineapp.com/>

<b>SCE Commercial Core Offerings (SCE-13-SW-002)</b>	Commercial	\$19,300,000	Lighting, Pumping, HVAC, Process, Food Service, Whole Building, Motors, Office Equipment, Building Envelope, Refrigeration <sup>25</sup>
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<sup>25</sup> For up-to-date program information and detailed measures list for Commercial programs, please visit: <https://www.sceonlineapp.com/>

**Table C-2. SoCalGas Summary of Comparable 2021 Programs**

<b>IOU Program Unique ID</b>	<b>Sector</b>	<b>Annual Budget<sup>24</sup></b>	<b>Eligible Measures</b>
<b>Home Upgrade Program - Multifamily Home Upgrade Program [SCG3705]</b>	Residential	\$2,361,124	Resource program
<b>Residential Direct Install Program [SCG3820]</b>	Residential	\$2,515,590	Resource program
<b>Statewide Finance Program – On-Bill Financing [SCG3735]</b>	Cross-cutting: Financing	\$5,500,000 loan pool	Resource
<b>New Financing Offerings [SCG3737]</b>	Cross-cutting: Financing	\$21,000,000 in credit enhancements available statewide	Resource
<b>Public Sector Calculated Incentive [SCG3815]</b>	Public	\$618,657	Resource
<b>Public Sector Deemed Incentive [SCG3816]</b>	Public	\$993,303	Resource
<b>Public Sector Direct Install [SCG3817]</b>	Public	\$1,031,108	Resource
<b>Public Sector K-12 Schools [SCG3758]</b>	Public	\$573,957	Resource
<b>LA County Partnership [SCG3742]</b>	Public	\$236,986	Non-resource
<b>Kern County Partnership [SCG3743]</b>	Public	\$107,540	Non-resource
<b>Riverside County Partnership [SCG3744]</b>	Public	\$135,086	Non-resource

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<sup>24</sup> Budget information related to the Partnership Programs listed here are a part of SoCalGas Public Sector. Actual budget information for the Public Sector and all other SoCalGas programs for PY 2021 will be provided in SoCalGas' 2021 Energy Efficiency Budget Advice Letter to be filed on September 3, 2019.

<b>IOU Program Unique ID</b>	<b>Sector</b>	<b>Annual Budget<sup>24</sup></b>	<b>Eligible Measures</b>
<b>San Bernardino County Partnership [SCG3745]</b>	Public	\$136,541	Non-resource
<b>Santa Barbara County Partnership [SCG3746]</b>	Public	\$126,827	Non-resource
<b>South Bay Cities Partnership [SCG3747]</b>	Public	\$159,704	Non-resource
<b>San Luis Obispo County Partnership [SCG3748]</b>	Public	\$104,975	Non-resource
<b>San Joaquin Valley Partnership [SCG3749]</b>	Public	\$118,220	Non-resource
<b>Orange County Cities Partnership [SCG3750]</b>	Public	\$147,455	Non-resource
<b>SEEC Partnership [SCG3751]</b>	Public	\$140,770	Non-resource
<b>Desert Cities Partnership [SCG3753]</b>	Public	\$18,436	Non-resource
<b>Ventura County Partnership [SCG3754]</b>	Public	\$165,602	Non-resource
<b>Gateway Cities Partnership [SCG3776]</b>	Public	\$168,815	Non-resource
<b>San Gabriel Valley COG Partnership [SCG3777]</b>	Public	\$234,757	Non-resource
<b>Westside Cities Community Partnership [SCG3779]</b>	Public	\$142,322	Non-resource
<b>Western Riverside Energy Partnership [SCG3783]</b>	Public	\$179,910	Non-resource
<b>North Orange County Cities Partnership [SCG3801]</b>	Public	\$155,594	Non-resource
<b>San Bernardino Regional Energy Partnership [SCG3802]</b>	Public	\$152,891	Non-resource
<b>WE&amp;T IEET [SCG3729]</b>	Cross-cutting: WE&T	\$2,808,149	Not applicable. SW Non-resource program



## APPENDIX D: SOCALREN-IOU (SCE AND SOCALGAS) COORDINATION PLAN FOR PUBLIC AGENCIES

# SoCalREN, SCE, SoCalGas Coordination Strategy for Public Agencies

*Last Updated: May 27, 2020*

SoCalREN and IOUs will coordinate their respective program offerings and resources to minimize duplicative offerings and work in an approach where the SoCalREN complements and supplements the IOU and IOU's Third-Party programs, yet understanding this is a reciprocal relationship. SoCalREN and IOUs should work toward a goal that minimizes duplication of programs consistent with the approved annual Joint Coordination Memo (JCM) and provides all public agencies a choice amongst all offerings of PAs allowing the customer to be the decision maker. This approach is in the best interest of the customer providing a range of options to help them meet their agencies goals.

Coordination laid out in this document is for agency enrollment, commitment, and ongoing delivery of SoCalREN's Public Agency non-resource programs, including:

- Project Delivery Program
- Distributed Energy Resources for DACs Project Delivery Program, also known as the Pathway to Zero Program
- Revolving Loan Fund

As the SoCalREN Public Agency Programs continue to grow and evaluate additional services and offerings, this document along with the SoCalREN/IOU NMEC Participation Coordination document and the approved annual JCM will continue to serve as guidance for coordination activities between SoCalREN and the IOUs for agencies interested in and committed to EE project implementation.

### **How will SoCalREN and IOUs coordinate services and activities for all public agencies?**

SoCalREN, SCE and SoCalGas will work collaboratively to develop coordinated strategies that enrich respective program offerings and elevate services to public agencies. Direct communications between SoCalREN Program Representatives, SCE Account Managers, SoCalGas Program Managers and Account Executives are intended to successfully drive energy efficiency project delivery and foster public agency satisfaction. Key coordination strategies include the following:

- Efforts will be made to present all utility core programs to customers by SoCalREN representatives when evaluating projects. SoCalREN will connect agencies with appropriate utility representatives when interest is expressed, and Utility leads will connect interested parties to SoCalREN representatives when interest is expressed.
- IOUs will provide regular information and updates to SoCalREN program representatives on core utility programs available to public agencies.
- SoCalREN will provide regular information and updates to IOU program representatives on SoCalREN Public Agency Programs.
- Any requests for presentation for IOU's programs should be coordinated through

- respective IOU's lead PM for IOU/REN coordination.
- SoCalREN's preference is to obtain customer information directly from the customer. SoCalREN may provide written customer authorization in order to obtain additional customer information related to energy efficiency project delivery, as needed.
  - Upon request, IOUs will provide customer authorized project-level data to SoCalREN monthly through the IOU/REN Data Transfer template.
  - SoCalREN will acquire written documentation of the customer's authorization for sharing information. This documented authorization will be distributed by SoCalREN to appropriate utility stakeholders (Public Sector/LGP Program Managers, Account Executives and key points of contact).
  - SoCalREN will timely inform SCE Account Managers and SoCalGas Account Executives/Public Sector/LGP Program Managers of an engagement meeting prior to enrollment in EE Project Delivery services and offer a pre-meeting coordination call to discuss client needs and opportunities. Notification would happen typically two weeks prior to a meeting; and pre-coordination meetings should happen a week prior to the customer meeting.
  - SoCalREN may elect to conduct the customer meetings during the enrollment process as a remote conference call or webinar. Preference stands for an in-person meeting, but consideration of travel related resources may lead to remote venues for cost-effective purposes.
  - SoCalREN will do their best to include the SCE Lead PM and SoCalGas Lead PM on all appropriate communications to other IOU representatives related to SoCalREN activity.
  - SoCalREN will follow the existing process of submitting incentive applications typical to a Trade Professionals when the customer has asked SoCalREN to file the incentive applications on their behalf. SoCalREN will work with the appropriate IOU representative for completing items such as a Project Feasibility Study and collecting influence documentation to insure a complete application for submittal.
  - SoCalREN will provide a courtesy copy of Incentive applications and Early Screening Documents to Account Managers/Account Executives at the time of submittal to Business Incentives.

### **How will SoCalREN and SoCalGas Public Sector/Local Government Partnerships coordinate services and activities?**

SoCalREN, SoCalGas Public Sector/LGP Program leads will prioritize collaboration and reciprocal communication with regards to EE project delivery services for public or LGP agencies as well as engagement with prior to enrollment in SoCalREN programs. Key coordination strategies include the following:

- SoCalREN will inform the appropriate SoCalGas Public Sector/LGP Program Manager when scheduling the engagement meeting with a public agency within a designated Public Sector/LGP region.
  - IOU representation at the engagement meeting is not a requirement, however, reasonable efforts to arrange for participation by interested IOU leads will be made by SoCalREN.

- When engaging non-LGP agencies within a SoCalREN Regional Partnership territory, SoCalGas will be extended the opportunity to educate agencies on the Public Sector/LGP Program availability during the engagement meeting. SoCalREN & SoCalGas will align on the presentation facilitation and content ahead of the meeting.
  - Remote facilitation for the engagement meeting may be requested by an agency or SoCalREN at any time. When facilitating a meeting in-person, remote participation may also be coordinated as needed or if an alternative utility representative cannot be identified to attend.
  - Confirmation of IOU attendance will be requested by the SoCalREN representative coordinating prior to the engagement meeting. Participation by no more than two (2) representatives from each IOU is preferred at the meeting with agency leads.
- SoCalREN will work with the SoCalGas representatives (Public Sector/LGP Program Manager and/or Account Executive) at coordinated pre-meetings prior to attending the engagement meeting to coordinate technical assistance offerings and determine how to best collaborate on a strategy that helps meet the client's needs, leveraging all feasible resources. For example: If an LGP has audit resources available, these should be evaluated (considering comprehensiveness and project needs) as a first step.
  - The facilitation roles and presentation plan will be coordinated when an SoCalGas Public Sector/LGP Program introduction is to be presented to a non-LGP agency.
  - Agency contacts, roles, and responsibilities will be confirmed, and communication strategies discussed.
- Agencies past activities through the Public Sector/LGP and participation in utility programs will be discussed to calibrate expectations of energy savings potential.
- If a Public Sector/LGP Program Manager/Account Executive receives an inquiry about SoCalREN program services, the Public Sector/LGP Program manager will contact SoCalREN representatives and determine how best to set the follow up meeting with the agency.
- Once the agency is enrolled, SoCalREN will inform the IOU and Public Sector/LGP representatives on key project related SoCalREN interactions and keep them informed of activities with those agencies.
- Once the agency is enrolled, IOU and Public Sector/LGP representatives will inform SoCalREN Representatives on key SoCalREN project-related interactions with the agency and keep them informed of activities with agencies.

**How will SoCalREN and other SCE/SoCalGas/3P programs coordinate services and activities?**

SoCalREN may engage and coordinate with additional utility program leads in order to avoid duplication of efforts and offerings. Initial introductions to 3rd Party or other Utility Program Leads for coordination purposes will be initiated through the SCE Lead PM and the SoCalGas Lead PM.

**How will outreach and education related to SoCalREN's Pathway to Zero be communicated to Public Agencies?**

SoCalREN shall work with SoCalGas and SCE on a quarterly basis (at the monthly Program Coordination Call) to ensure that all DER materials are up-to-date and correct. SoCalGas and SCE Coordination leads will be responsible for coordinating with their respective internal contacts to notify SoCalREN of any programmatic changes at this quarterly check-in. Additionally, when presenting the Pathway to Zero program to a local public agency, the SoCalREN PM shall reach out to the utility account manager to see if there are any particular programs that may be particularly useful for that public agency.

**How will outreach and education related to SoCalREN be communicated to Public Agencies?**

Any requests for presentations about SoCalREN should be coordinated through SoCalREN. SoCalREN Program representatives are available to present program offerings to any audience.

**How will Public Sector/LGPs, Account Managers and other Program leads learn about SoCalREN?**

The IOUs will have lead responsibility for informing their Public Sector/LGP representatives and Account Managers about the coordination strategy with SoCalREN.

Opportunities to learn about the program include:

- Attendance at a Joint IOU / SoCalREN Reintroduction Workshop, to be offered at various locations throughout the IOU territory in coordination with the IOUs.
- Public Sector/LGP Program Managers/Account Managers may request to coordinate with SoCalREN to jointly host meetings with public agencies to present SoCalREN's services.
- 3rd Party Program Managers may also choose to coordinate with SoCalREN to jointly host meeting with public agencies to present SoCalREN's services.
- Additional opportunities for SoCalREN presentations will be offered on request.

**APPENDIX E: SOCALREN-IOU (SCE AND SOCALGAS) NMEC PARTICIPATION COORDINATION FOR PUBLIC AGENCIES**

**SoCalREN, SCE, SoCalGas**

**NMEC Participation Coordination for Public Agencies**

*Last Updated: October 1, 2019*

SoCalREN and IOUs will coordinate their respective program offerings and resources to minimize duplicative offerings and work in an approach where the SoCalREN complements and supplements the IOU and IOU's Third Party programs, yet understanding this is a reciprocal relationship. SoCalREN and IOUs should work toward a goal that minimizes duplication of programs consistent with the approved annual JCM and allows all public agencies a choice amongst all offerings of PAs allowing the customer to be the decision maker. This approach is in the best interest of the customer providing a range of options to help them meet their agencies goals.

Coordination laid out in this document is for public agency participation in NMEC resource programs offered by the IOUs and SoCalREN. These currently include:

- SCE High Opportunity Program and Projects (HOPPs), also known as the Public Sector Performance Based Retrofit Program
- SCG HOPPs, also known as the Metered and Performance-Based Retrofits Program
- SoCalREN Public Agency NMEC program, also known as the Metered Savings Program.

As the SoCalREN Public Agency NMEC Program and IOU NMEC Programs continue to grow and evaluate additional services and offerings, this document along with the approved annual JCM will continue to serve as guidance for coordination activities between SoCalREN and the IOUs for agencies interested in and committed to energy efficiency project implementation using an NMEC approach.

**How will SoCalREN and IOUs coordinate NMEC offerings?**

SoCalREN, SCE and SCG will work collaboratively to develop coordinated strategies that elevate services to public agencies. Direct communications between SoCalREN Program Representatives, SCE Account Managers, and SCG Account Executives are intended to successfully drive energy efficiency project delivery and foster public agency satisfaction. A project that is identified within a public agency that is enrolled in the SoCalREN Public Agency Programs will follow the attached *NMEC Decision Tree* with activities led by the SoCalREN Project Manager.

**Eligibility for Program Participation**

To be eligible for SoCalREN NMEC, the public agency must first be enrolled in the SoCalREN Public Agency Programs following the process described in the *SoCalREN, SCE, SoCalGas Coordination Strategy for Public Agencies*. Both the SCE and SCG HOPPs programs are available to all public agencies. Project specific eligibility requirements can be reviewed in each respective program's Program Manual.

### **Additional Participation Considerations**

Projects that meet the following criteria default to HOPPs and will not be offered the SoCalREN NMEC program unless they drop out of or decline HOPPs:

- They are in the queue for HOPPs prior to June 1, 2020. The queue is defined as receiving predictability analysis<sup>26</sup> through the respective program.
  - Any projects that are not in the HOPPs queue by June 1, 2020 will follow the established process established to present both programs.
- The IOU has provided audit services within the last 18 months.
  - Going forward, if an agency is enrolled in SoCalREN Public Sector Programs, IOUs should coordinate with SoCalREN prior to performing an audit.

Once an agency has selected a pathway and predictability analysis performed by the program, the agency will not be presented other program options unless they drop out of the selected program. Any project that drops out of an NMEC program, regardless of provider, can pursue a different NMEC program.

### **Communications with Public Agencies**

When having the customer choose which path to pursue, the IOUs will be invited to be at the table, but their attendance is not mandatory. Conversely, when the IOUs are having HOPPs conversations with SoCalREN enrolled public agencies, SoCalREN will be invited to provide their service offerings. In addition, prior to SoCalREN presenting an NMEC program to an agency for a project, both IOUs and SoCalREN will hold a pre-coordination call.

### **How will SoCalREN and IOUs prevent Double Dipping?**

The IOUs and SoCalREN are committed to coordinating to prevent double dipping between the SoCalREN NMEC Program and IOU/3rd Party Program offerings, including upstream/midstream programs. Early screening and ongoing communication on potential projects will support this activity. Additional protocols will be developed as projects emerge and new programs come online.

### **Can a single project participate in two NMEC programs?**

A facility with one or more electric meters and one or more gas meters may participate in HOPPs for electric savings and SoCalREN Metered Savings Program for gas savings or it may participate in HOPPs for gas savings and SoCalREN Metered Savings Program depending on the agency needs and project criteria. This would require additional coordination between the IOU and SoCalREN as a single measure could have both gas and electric savings. The interactive effects of measures would also need to be considered by the IOU and SoCalREN.

### **What SoCalREN services will be offered to projects that leverage an IOU NMEC program?**

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<sup>26</sup> Analysis of pre-installation energy usage patterns of a facility or site to evaluate the feasibility for an NMEC program approach

The SoCalREN Public Agency EE PDP is a non-resource program that provides comprehensive support services to EE projects from identification to completion. The PDP will continue to support agencies with project identification and audit services, from which NMEC potential projects may be developed. Following the delivery of the agency services plan (step 7 on the decision tree), the services will be available as follows to HOPPs projects:

- Projects in the queue prior to June 1, 2020 would continue to receive full PDP services through completion.
- Projects without IOU NMEC resources committed (baseline modeling completed) by June 1, 2020 to follow standard protocol
- New IOU NMEC projects identified past June 1, 2020 would no longer receive SoCalREN PDP services after customer services plan is presented and HOPPs pathway is selected by the customer.

**How will outreach and education related to SoCalREN NMEC programs be communicated to Public Agencies and utilities?**

Inquires about the SoCalREN NMEC Program should be directed to the Program Implementer. Any questions from utility staff should be directed to SCE/SCG lead PM.

# NMEC Decision Tree

