

**SoCalREN, 3C-REN, SCE,
SoCalGas, and I-REN 2023 Joint
Cooperation Memorandum**

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I. SUMMARY OF SOCALREN, 3C-REN, I-REN, SCE, AND SOCALGAS PORTFOLIO COORDINATION

The California Public Utilities Commission’s (CPUC) Decision (D.)18-05-041 requires energy efficiency (EE) program administrators (PAs) with overlapping service areas to submit a joint cooperation memorandum (JCM) to coordinate program activities. Specifically, the directive states: “We will require the PAs (RENs, IOUs, and CCAs) 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.”¹

For their 2023 EE portfolios, Southern California Regional Energy Network (SoCalREN), Tri-County Regional Energy Network (3C-REN), Inland Regional Energy Network (I-REN), Southern California Edison (SCE), and Southern California Gas (SoCalGas) (hereinafter referred to as the “Joint PAs”) will continue to collaborate with each other with respect to the Joint PAs’ overlapping programs. As part of each of the Joint PAs’ focused transition to performance-based and comparatively cost-effective and cost-efficient EE portfolios, the Joint PAs will be continuing to collaborate to ensure that their respective overlapping regional programs do not result in unnecessary duplication or cause customer confusion. The Joint 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 2023 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.

¹ D.18-05-041 at p.97

Details on how each of the Joint PA’s 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 2023 AND COMPARABLE PARTNER IOU 2023 PROGRAMS

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

SoCalREN’s Multifamily Program provides energy assessments and improvement incentives to building owners for comprehensive EE upgrades to qualifying structures of at least five units. The SoCalREN Multifamily Program offers incentives to drive increased adoption of energy efficiency and program rules that require multi-measure upgrades. The program was developed as a flexible solution, composed of technical assistance, building audits, energy modeling, program implementation, and construction/installation incentives.

In addition, the SoCalREN Multifamily Program utilizes a collaborative approach that provides direct account management services to participating program contractors. This includes regular communication through various channels (e.g., conference calls, emails), as well as ongoing follow-up to develop project scopes, monitor construction progress and verify installation.

A primary objective for all SoCalREN strategies is to meet the needs of underserved, hard-to-reach markets and disadvantaged communities. SoCalREN leverages pre-existing government frameworks specifically designed for underserved and Disadvantaged Communities (DAC), reducing administrative, and delivery costs. SoCalREN leverages regional government partners to promote program services to underserved multifamily market sub-segment and local contractors who serve that market.

Multi-language SPOC

SoCalREN offers the RCC Multilanguage Single Point of Contact (SPOC) as a sub-strategy and the supporting multi-language tools. This strategy is used for direct outreach to small MF property owners and hard-to-reach customers whose primary language is not English.

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
- d) Offer multi-language strategies such as a multi-language SPOC to engage and support MF property owners.
- e) 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 Joint PAs’ respective multifamily programs.

Table 1: SoCalREN, SCE, SoCalGas, and 3C-REN Multifamily Program Summary

Program Parameters	SoCalREN Whole Building Comprehensive Multifamily Program	SCE Willdan Multifamily Energy Efficiency Program	SoCalGas – under the HUP umbrella	3C-REN Multifamily Home Energy Savings Program
Target Audience(s)	<ul style="list-style-type: none"> ✓ All multifamily customer segments (5 units and larger) of the residential sector across SCE and SoCalGas's service territory ✓ HTR-Multifamily property owners - Primary language spoken is a language other than English ✓ Multifamily property owners within DACs/DAC Communities. 	<ul style="list-style-type: none"> ✓ All multifamily customer (small, medium and large) segments of the residential sector across SCE's service territory including hard-to-reach (HTR) customers and/or those in disadvantaged communities (DACs). Property owners and managers of existing multifamily properties within SCE's service area. The program targets all levels of multifamily buildings (i.e., low-income, affordable-to-moderate income, market-rate). 	<ul style="list-style-type: none"> ✓ 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. ✓ Low income, affordable-to-moderate income, and market rate are eligible to participate. ✓ Property owners of multifamily complexes within DAC/DAC communities. 	<ul style="list-style-type: none"> ✓ All multifamily residential (5 or more units, existing buildings) customer segments in Ventura, Santa Barbara, and San Luis Obispo Counties ✓ Emphasis on targeting hard-to-reach (HTR) residential customers, including multifamily renters and owners, multifamily properties located in DACs, and moderate-income families not currently being served by, nor meeting the criteria of current ESA and LIHEAP.
Program Delivery Approach	<ul style="list-style-type: none"> ✓ Whole Building (common areas and in-unit) ✓ Custom and Deemed 	<ul style="list-style-type: none"> ✓ Whole-building (common areas and in-unit) ✓ NMEC-Based Site-Specific; Customized Calculated and 	<ul style="list-style-type: none"> ✓ Whole Building 	<ul style="list-style-type: none"> ✓ Whole Building (common areas and in-unit measures)

Program Parameters	SoCalREN Whole Building Comprehensive Multifamily Program	SCE Willdan Multifamily Energy Efficiency Program	SoCalGas – under the HUP umbrella	3C-REN Multifamily Home Energy Savings Program
		Deemed Approaches.		
Differentiating Programmatic Features	<ul style="list-style-type: none"> ✓ 60% Incentive Cost-Cap ✓ 75% Incentive Cost-Cap for DACs/HTR ✓ Incentives based on a \$/kWh and \$/therm basis ✓ Offers Program with Partner Gas Muni’s ✓ Multi-language SPOC (concierge-type support) ✓ Targeted marketing collateral ✓ Leverage existing relationships with property management firms ✓ Customer surveys 	<ul style="list-style-type: none"> ✓ Provides customers choice of incentive, financing, and/or services. ✓ Full-service building approach delivered through Trade Pros and Community-based Organization networks specializing in MF segment ✓ Integrated delivery team provides comprehensive services ✓ Intelligent outreach using proprietary software and modeling ✓ Simple, customer-friendly offer providing customers choice of financing, technical assistance, and flexible incentives. ✓ Single point of contact (SPOC or concierge-type support) ✓ Community blitzes (i.e., door-to-door canvassing) ✓ Strategic partnerships Direct install (DI) and do-it-yourself (DIY) measures ✓ Financing options (i.e., debt or loan financing, lease financing, 	<p>The program will implement maximum incentive levels based on the type of property.</p> <ul style="list-style-type: none"> ✓ Market Rate Projects will be incentivized up to 50% of total project cost. ✓ Affordable Projects can be incentivized up to 65% project cost. To qualify for the Affordable Incentive Path, a project must be classified as a Disadvantaged Community (DAC) or Hard to Reach (HTR). Additionally, projects that meet the Energy Savings Assistance program (ESA) guidelines are also eligible for the Affordable Incentive path. <p>Five incentive tiers are available.</p>	<ul style="list-style-type: none"> ✓ Addresses territory that is far removed from other PAs’ outreach and implementation efforts in Ventura, Santa Barbara, and San Luis Obispo Counties. ✓ Incentivizes property manager/owner to make EE upgrades by developing personalized energy upgrade plans based on the energy assessment of each property and by allowing them to work with contractors of their choice. ✓ Beneficial to both the resident and manager/owner ✓ Higher incentives for underserved properties ✓ Incentive adds for high performance measures

Program Parameters	SoCalREN Whole Building Comprehensive Multifamily Program	SCE Willdan Multifamily Energy Efficiency Program	SoCalGas – under the HUP umbrella	3C-REN Multifamily Home Energy Savings Program
		<p>performance contracts, property assessed clean energy [PACE], and energy efficiency as a service)</p> <ul style="list-style-type: none"> ✓ Targeted marketing collateral ✓ Simplified energy management technologies (EMTs) with demand response (DR) capabilities ✓ Leverage existing relationships with property management firms, and ✓ Customer surveys. 		
Resource or Non-Resource	Resource	Resource	Resource	Resource
Eligible Measures	<p>The program offers custom incentives for energy- efficiency measures for both common area and tenant units at multifamily properties located within the SoCalREN region. Eligible measures include: Appliances, HVAC, Lighting, Pumping, and Water Heating.</p>	<p>The program offers deemed, customized, and NMEC-based site specific approach measures for energy-saving equipment for both common and in-unit areas; end uses include HVAC and Lighting, and Water Heating, Pool pump, High efficiency kitchen appliances, Showerheads and Faucets and Energy Management Technologies.</p>	<p>Home Upgrade Program- Multifamily Whole Building Program 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.</p>	<p>The Multifamily Home Energy Savings program offers site-specific measures that achieve energy savings both in-unit and in common areas.</p>

Program Parameters	SoCalREN Whole Building Comprehensive Multifamily Program	SCE Willdan Multifamily Energy Efficiency Program	SoCalGas – under the HUP umbrella	3C-REN Multifamily Home Energy Savings Program
Budget	\$7,000,000	\$19,595,052	\$2,783,455	\$3,430,037

Similar to the SoCalGas Multifamily Whole Building Program and 3C-REN Multifamily Home Energy Savings Program that are currently offered to customers, SoCalREN’s multifamily projects must install at least three EE measures. SoCalREN’s Multifamily program includes a 60% total project incentive cost-cap for non-DAC/HTR (75% total project incentive cost-cap for DAC/HTR) multifamily properties.

The program’s primary objective is to meet SoCalREN’s business plan goals and achieve deeper savings through comprehensive solutions. Most importantly, the program aims to increase EE adoption rates within hard-to-reach (HTR) and/or disadvantaged communities (DACs) properties. An integrated team has been established over the last eight years with extensive MF experience that ensure continued successful delivery of deep energy savings projects.

SoCalGas’s Multifamily Whole Building Program has an incentive cost-cap of 50% of total project cost for Market Rate Properties and 65% for properties deemed as Affordable Projects; SoCalGas also promotes its On Bill financing Program (OBF) to be bundled in all projects eligible.

SCE has contracted with Willdan Energy Solutions to develop, implement, and offer an EE program to SCE multi-family customers. This Multifamily Energy Efficiency Program offers technical, engineering, and financial services, flexible incentives, DI or turnkey or DIY solutions for deemed, calculated, and/or NMEC approach EE measures energy-saving. SCE’s program offers incentives only for electric measures (i.e., single fuel), whereas SoCalREN’s program offers incentives for EE measures utilizing both gas and electric fuels.

3C-REN’s Multifamily Home Energy Savings (MHES) Program serves HTR multi-family building owners, renters, and DACs in Ventura, Santa Barbara and San Luis Obispo Counties. The program leverages existing relationships with local government agencies, housing authorities, and

community-based organizations for outreach to properties housing underserved multifamily customers such as farmworkers and formerly unhoused individuals. The incentive structure includes enhanced incentives for underserved properties, and adders for higher performance measures, such as heat pumps. In the Tri-County area, it is common for the resident to pay their energy bills, so property owners have little incentive to implement EE measures on their property. 3C-REN's Multifamily Program aims to target property owners in the Tri-County region with non-prescriptive measure mixes to meet the varied needs of multifamily property owners in 3C-REN territory.

SCE's program goes beyond basic EE and includes Demand Response (DR), energy management technologies, Integrated Demand-Side Management (IDSMS) solutions and electrification upgrades offered to customers, excluding any storage technology. This approach minimizes the barriers for customer participation. This Program offers full-service building approach to Multifamily properties throughout SCE's service territory. SoCalREN's Multifamily program will also go beyond basic EE by incorporating external funding resources that will enable multifamily dwellings to incorporate EVSE infrastructure funded by the California Energy Commission. 3C-REN's MHES program will leverage project team connections to layer 3C-REN incentives with other offerings such as TECH Clean California and LIWP, as well as solar and EVSE where appropriate, to increase financial benefits and clean energy impacts for property owners and tenants.

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

Table 2: Multifamily Program Comparison

Program Parameters	SoCalREN Whole Building Comprehensive Multifamily Program	SCE Willdan Multifamily Energy Efficiency Program	SoCalGas - under the HUP umbrella	3C-REN Multifamily Home Energy Savings Program
Project Delivery Model	Program team and Contractors identify project opportunities, work with program engineers to assess current property conditions and identify project scope. Incentive opportunity is presented to customers. Contractor then completes project installation based upon the agreed scope of work. Engineering team models baseline and as-built energy savings in EnergyPro and incentive is based on energy savings achieved.	Willdan along with its program partners will work with Customers to identify project opportunities. Program engineers will assess current property conditions and identify project scope, provide the customer with estimated kWh savings, customer’s enrollment options, measures, the price, and the billing cycle. Incentive opportunity and financing options are presented to the customers. Once the proposed project is accepted by Customer and subsequently approved for installation by SCE and CPUC, the project is installed through Willdan authorized installer or channel partner 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 to encourage customers to add measures to their scope of work and educate them on the energy savings achieved. Customers install the agreed upon set of measures through the installer of their choice.	MHES program marketing and outreach leverages existing relationships and forming partnerships with local and regional stakeholders, and residents to advocate for the program. Enrolled property owners receive concierge-style technical assistance, site assessments, project scope, and hands-on support through contracting and installation.
Minimum Energy Savings Required per Project	10,000 kWh or 1,000 therms	N/A	5% (gas savings)	0.25MT CO2e savings per apartment unit
Minimum Number of Measures	3 measure minimum. must include both electric and gas efficiency measures	1 measure	3 measure minimum and must include a core measure (installation of a major capital improvement).	3 measure minimum
Minimum Number of Dwelling Units	5 units	N/A	3 units	5 units

Program Parameters	SoCalREN Whole Building Comprehensive Multifamily Program	SCE Willdan Multifamily Energy Efficiency Program	SoCalGas - under the HUP umbrella	3C-REN Multifamily Home Energy Savings Program
Deemed vs Calculated	Measures are calculated using a combination of energy modeling results and ED approved workpapers or custom calculations.	Deemed, Calculated, NMEC-Based Site Specific Approaches	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.	The Multifamily Home Energy Savings program will use a combination of energy savings calculations methodologies including EnergyPro Lite, workpapers, EnergyPro Model, and custom calculations.
Program Delivery Approach	Whole Building	Whole-building (common areas and in-unit)	Whole Building	Whole-building (common areas and in-unit)
Total Incentive Project Cost-Cap	60% non-DAC properties, 75% DAC/HTR properties	None	50% Market Rate 65% Affordable (DAC, HTR, ESA qualified).	Project cap of \$100,000 for Central HPWH systems
Assessment Structure	Program engineers conduct a property site assessment to inform the baseline energy model. Measure recommendations are provided to the customer in the Assessment Report which includes estimated energy savings and potential incentives available for the project.	SCE Third Party Contractor (Willdan) provides assessment as well as technical assistance and recommendations to assist customer and or customer's contractor. Willdan verifies customer's facility meets the program participation criteria, performs no-cost consultation/audit of customer's facilities, and provides energy efficiency/savings opportunities.	SoCalGas Consultant and program SPOC provides assessment as well as technical assistance and recommendations to assist customer and or customer's contractor.	Participants will work with a Technical Assistant (TA) to conduct an energy assessment to identify energy upgrades and associated GHG savings predictions and develop a project scope.

Program Parameters	SoCalREN Whole Building Comprehensive Multifamily Program	SCE Willdan Multifamily Energy Efficiency Program	SoCalGas - under the HUP umbrella	3C-REN Multifamily Home Energy Savings Program										
<p>Improvement Incentive Structure</p>	<p>Incentives are based on the energy savings modeled at project completion using the following rates:</p> <ul style="list-style-type: none"> • Properties located in Disadvantaged Communities (DACs) receive: <ul style="list-style-type: none"> ○ \$0.57/kWh ○ \$6.00/therm • Non-DAC Properties receive: <ul style="list-style-type: none"> ○ \$0.33/kWh ○ \$3.50/therm 	<p>Customer’s choice of incentive, financing, and/or services as agreed upon between Customer and Third- Party Contractor.</p>	<p>Incentives are tiered based on percent improvement in site gasenergy use, and multiplied times the number of units in the property. Total amountcannot exceed corresponding caps forMarket Rate or Affordable projects.</p> <div data-bbox="1008 846 1271 976" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Energy Efficiency Incentives</p> <p><small>The incentive amount corresponds to the level of energy efficiency achieved</small></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Natural Gas Savings*</th> <th style="text-align: right;">Incentive Per Unit</th> </tr> </thead> <tbody> <tr> <td>7-9%</td> <td style="text-align: right;">\$425</td> </tr> <tr> <td>10%</td> <td style="text-align: right;">\$575</td> </tr> <tr> <td>12%</td> <td style="text-align: right;">\$825</td> </tr> <tr> <td>15%</td> <td style="text-align: right;">\$1075</td> </tr> </tbody> </table> </div>	Natural Gas Savings*	Incentive Per Unit	7-9%	\$425	10%	\$575	12%	\$825	15%	\$1075	<ul style="list-style-type: none"> • \$500 per unit for general market properties • \$750 per unit for underserved properties <p>Additional incentives for higher performance measures, such as heat pumps.</p>
Natural Gas Savings*	Incentive Per Unit													
7-9%	\$425													
10%	\$575													
12%	\$825													
15%	\$1075													
<p>CAS Testing Requirements</p>	<p>None</p>	<p>None</p>	<p>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 usedto document that specified improvements have beenproperly sized and installed</p>	<ul style="list-style-type: none"> • None 										

Program Parameters	SoCalREN Whole Building Comprehensive Multifamily Program	SCE Willdan Multifamily Energy Efficiency Program	SoCalGas - under the HUP umbrella	3C-REN Multifamily Home Energy Savings Program
Documentation Required	Property energy Assessment Report, EnergyPro simulation files, project and building information, proposed scope of work, Installation Report.	Verification of EE measure eligibility, approved workpaper (for Deemed measures), Pre-Installation Inspection Report and/or Post- Installation Inspection Report, and Early Screening Document, and Project Feasibility Study (for Calculated and NMEC measures).	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).	Property project scope that meets the minimum GHG savings requirements, EnergyPro Lite model and report, project summary workbook, invoices for all installed measures, quality assurance report, measure specific calculators and proof of permit closure if applicable.
Project Measures Incentivized	Gas/ water/ electric measures (please see eligible measure list)	Lighting, HVAC, Water Heater, and other technologies, Pool pump, High efficiency kitchen appliances, Showerheads and Faucets and Energy Management Technologies.	All typical gas 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.	Eligible measures and services to reduce energy usage may include, but are not limited to, the following: <ul style="list-style-type: none"> • Domestic Hot Water • HVAC • Envelope improvement • Appliances • Lighting

3. Comparable SoCalGas Program – Home Upgrade Program - Multifamily Whole Building [SCG 3705]

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 and provide guidance to customers across all their portfolios, while addressing the energy needs specific to each property. The program collaborates with customers' contractors/installers to address specific opportunities at any given property and develop achievable installation timelines. 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.

Furthermore, the Multifamily Whole Building Program recognizes the specific needs of Hard-to-Reach customers and those within Disadvantaged Communities; its incentive structure allows for higher incentive amount to assist with project costs.

SoCalGas team is comprised of a group of experts (internal and external) that meet regularly and work collaboratively for the customer's benefit to help realize maximum energy savings:

- External – Technical Consultant services are offered at no cost to the customer to facilitate program participation and offer meaningful guidance about the Energy Efficient project up front.
- Internal – Program Advisors, Single Point of Contact, Account Executive team, and On Bill Financing team provide information tailored specifically for each property in a comprehensive approach.

The entire team serves as a One Stop Shop to help customers and property management companies participate through the program. This approach is highly supported by the Single Point of Contact, who assists to remove barriers for participation by streamlining communications for customers.

In addition to SoCalGas' Multifamily Whole Building program, direct install and rebate programs are also offered through 3rd party implementers throughout the service territory. These programs will pursue partnership opportunities with other utility companies/municipalities within the service territory, where and when applicable.

The two Third Party Programs offered are as follows:

- *SCG 3889 Multifamily Energy Alliance (MEA)*: the program seeks to provide accessible solutions to SoCalGas customers through a direct install (no-cost to the customer) approach for thermostats, low flow showerheads, thermostatic shower valves, faucet aerators, and recirculation pump controls. Additionally, the program will aim to deliver a comprehensive deemed approach by also providing rebates for clothes washers, attic insulation, pipe/fitting insulation, energy star dryers, furnaces, tankless water heaters, pool/spa heaters, and boiler controls. One of the goals of the program is to serve Hard to Reach customers and customers in Disadvantaged Communities. The program will direct customers to SoCalGas' Energy Savings Assistance Program and Multifamily Whole Building Program when such programs are determined to represent a best fit solution for a project.
- *SCG 3888 Multifamily Space and Water Heating (MF SAWH)*: the program is implemented by a third party which specializes in hydronic systems. The program will target multifamily properties with 30 units or more that have combined central domestic hot water and space heating. The program will provide installation of the following measures at no cost to customers through a direct install approach: water heater VFD pump control, dual set point temperature control, pipe insulation, and faucet aerator (or under sink flow restrictor).

Additionally, SoCalGas offers rebates for deemed measures through the SoCalGas'

Multifamily Energy Efficiency Rebate (MFEER) Program for the purchase and installation of EE measures conducted by the property owner or manager. MFEER will coordinate with MEA to ensure all rebate opportunities are covered/offered while maintaining clarity of the options available within each program.

SoCalGas' Single Point of Contact (SPOC) will work with customers to facilitate the customer journey and notify customers of additional programs available that could complement or be a best fit for their property. SoCalGas' SPOC will also direct customers to SoCalREN staff whenever it is identified that the SoCalREN program can provide suitable solutions. Furthermore, SoCalGas will share opportunities with SoCalREN to promote the Multifamily programs together, through webinars or events that could be hosted jointly. This effort will ensure clarity of offerings within the Multifamily market and allow for cost savings.

Lastly, as a response to COVID-19 and to best serve customers during the pandemic, the Multifamily Whole Building Program has implemented virtual inspections as an alternative to in-person inspections. This has removed barriers when onboarding projects and closing them; customers feel empowered to continue to consider energy efficiency projects as they learn about processes that enable them to do so in a safely manner. The program will keep implementing this approach as long as possible to continue to allow for additional cost savings resulting from the removal of travel time/mileage to conduct assessments.

4. Comparable SCE Multifamily Energy Efficiency Program – Willdan [SCE_3P_2020RCI_004-]

SCE has contracted with Willdan Energy Solutions (Third-Party) to develop, implement, and offer this EE Program to SCE customers. This Third-Party program provides comprehensive EE for all multifamily (MF) customer segments of the residential sector across SCE's service territory. This program seeks to influence a significant increase in the adoption of EE technology and/or measures among the end-users of this market sector using the Deemed, Custom Calculated and Normalized Metered Energy Consumption approaches. The program offers a consolidated approach that includes segment-specific marketing, technical assistance, technologies, whole-facility opportunities,

financing, and measurement and verification (M&V).

As stated above, the program goes beyond basic EE to include Demand Response (DR), energy management technologies and fully Integrated Demand-Side Management (IDSM) solutions. IDSM and electrification upgrades are offered to customers, excluding any storage technology. This approach minimizes the barriers for customer participation.

This program will offer a single point of contact (SPOC) and a significant share of program services will be provided through Channel Partners, Trade Pros, Installers, and community-based organization (CBO) networks.

The program's primary objective is to meet SCE's business plan goals and achieve deeper savings through comprehensive energy management solutions. An additional objective is to increase EE adoption rates by targeting MF residential sub-segments including hard-to-reach (HTR) customers and/or those in disadvantaged communities (DACs). An integrated team with extensive MF experience will develop tailored responses that align with SCE's objectives and draws on existing customer relationships with property owners to increase the number of completed projects.

5. Comparable 3C-REN Program: Multifamily Home Energy Savings (MHES) Program [TCR-Res-002]

3C-REN's Multifamily Home Energy Savings (MHES) Program serves hard-to-reach (HTR) multi-family building owners, renters, and Disadvantaged Communities (DACs) in Ventura, Santa Barbara and San Luis Obispo Counties. Multifamily properties with five or more units are eligible to participate. The program includes site assessments, technical assistance, and a rebate structure that is based on the number of units in the complex. To qualify for the rebates, the project scope of work must achieve a minimum of 0.25MT CO₂e savings per apartment unit. The incentive structure also includes enhanced incentives for underserved properties, and adders for higher performance measures, such as heat pumps.

To participate in the program, property owners/managers (participants) can sign up on the 3C-REN website. Marketing efforts to drive participants to sign up will include events, calls, emails, etc.

Following sign up, participants will work with a Technical Assistant (TA) to conduct an energy assessment to identify energy upgrades and associated GHG savings predictions and develop a project scope. Once the scope has been developed (that meets the GHG savings requirements), a rebate will be reserved for the participant. The participant is responsible for implementing the project scope. It is expected that participants will work with contractors that they already have relationships with, or to review quotes from other area contractors. Although the responsibility lies with the participant to implement the project scope, the TA will provide assistance throughout the bid process and construction of the project. Technical assistance will also include support in identifying financing and accessing additional incentives beyond those offered in this program. Once construction is completed, the TA will verify the project and process incentive payments, which are paid directly to the participant.

The project scopes for each property will vary based on energy assessments, but can include whole building, common area, and in-unit measures. The program does not provide a prescriptive list of eligible measures, but will allow energy-saving upgrades for domestic hot water, HVAC, building envelope, appliances, and lighting.

6. Coordination Protocol Between Programs

A focus on collaboration among the PAs is critical to all multifamily programs' success. For its residential programs, the Joint PAs will communicate via email or in regular coordination meetings. The Joint PAs also 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. The Joint PAs will make each other aware of programs and resources available, including multifamily residential programs. The Joint PAs will provide notice once advice letters have been filed and implementation plans have been uploaded to CEDARS of any new program similar to other Joint PAs' programs. Through SoCalREN's Residential Community Coordinator (RCC), all available

information regarding all possible IOU, REN, and third-party program and incentive opportunities will be made available so that the Joint PAs’ constituents are informed about all available options, thus gaining deeper energy savings for the state.

7. 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.

8. 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.12-11-015.

Table 3: SoCalREN’s 2023 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"> ✓ Leverage public agencies to drive multifamily downstream incentives to property owners. ✓ Will market an incremental installation phase approach to allow multiple measures over time for whole building.
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"> ✓ 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.

B. SOCALREN KITS FOR KIDS (SCR-RES-A3)

The SoCalREN Kits for Kids program provides energy-saving measures to families within the service area who have third and fourth grade students attending local elementary schools. A set of measures will be offered at no cost to participating students and their families. These no-cost measures will provide realized energy savings for each household. In addition to the energy and cost saving

achieved by the student, Kits forKids will provide educators with a classroom grant. Kits for Kids will generate energy savings and provide relief to families who are impacted by high monthly utility bills, and to educate future household decision-makers to continue prioritizing energy efficiency in the future.

Kits for Kids provides a model wherein families are provided with a home-based educational activity (Energy Efficiency Scavenger Hunt) and kids an interactive online game/tool. The online game and family activity is designed to help the student make connections between concepts learned through third and fourth grade science and how the members of their household use energy at home, in a fun, hands-on fashion. The program’s primary objective is to drive knowledge that leads to energy champions within our communities.

1. Summary of Program Objectives

- Generate energy savings (kWh and therms) through the installation of measures in the homes of students participating in the Kits for Kids Program
- Provide financial relief to families/households through both energy cost savings and the no-cost measures provided to households
- Educate students, parents, and guardians about energy efficiency to help household members make informed decisions now, and to encourage the continuation of energy efficient behaviors by the students in the future.
- Drive climate action within residential communities.

2. Summary of Program Differentiation

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

Table 4: SoCalREN, SCE, and SoCalGas Similar Program Summary

Program Parameters	SoCalREN	SCE	SoCalGas
Target Audience(s)	3rd and 4th grade students and their families residing in single and multifamily homes	N/A for all rows	6th grade students and their parents.
Resource or Non-Resource	Resource		Resource

Program Parameters	SoCalREN	SCE	SoCalGas
Eligible Measures	(2) LED Light bulbs (1) Showerhead (2) Faucet Aerators -1 Kitchen 1.5GPM -1 bath 1.0GPM		Aerators – lavatory 0.5 Aerators – Kitchen 1.5 Showerheads 1.5 Filter Tone Alarm
Budget	\$1,200,000		\$1,702,415

SoCalREN’s Kits For Kids program goes beyond other educational programs by incorporating an interactive online gaming tool. In addition, information gathered during the program activity will be used to verify existing conditions in the home (e.g. number of incandescent bulbs, etc.). This information will serve as key EM&V ex-post information and will assist in determining energy savings associated with the free measures provided for installation. These strategies go beyond existing similar programs within the market. Finally, this program will be focused in targeted areas in the SoCalREN service area that are currently underserved, DAC, rural and low-income communities.

The following table compares the key program parameters against similar PA’s applicable programs.

Table 5: REN and IOU Program Comparison

Program Parameters	SoCalREN	SCE	SoCalGas
Program Delivery Approach	<p>The Kits for Kids Program utilizes an interactive online game platform to inform kids about the benefits energy savings while engaging them on the installation process with the supervision of their parents.</p> <p>Program model also utilizes public agency partners specifically schools, school districts and Counties Education Offices to promote energy leadership and drive energy efficiency beyond the classrooms.</p>	N/A	<p>The LivingWise (LW) Program is a school-delivered residential energy savings program that provides a blend of classroom activities and take-home retrofit and audit projects which students complete as homework assignments with their parents and families. The LW Program is applied at the 6th Grade level in California to best align with State Learning Standards and is offered to eligible teachers as an elective program.</p>
Deemed vs Calculated	Deemed		Deemed
Incentive Structure	<ul style="list-style-type: none"> • 65% of Students must install measures for classroom incentive • Each classroom receives a \$500 or \$1,000 grant depending on class size 		<ul style="list-style-type: none"> • N/A
Approval	<ul style="list-style-type: none"> • Postcard submitted to teacher and online platform • game captures installation progress as kids/family's complete activity; • SoCalREN to process and verify via postcard submittal/online collection. 		<ul style="list-style-type: none"> • Program enrollment occurs when the teacher provides a teacher participation agreement by fax, email or online to receive energy efficiency services for their classroom
Project Measures Incentivized	<ul style="list-style-type: none"> • Gas/water • Electric measures provided but not qualified for deemed savings at this time 		<ul style="list-style-type: none"> • Gas/water

Program Parameters	SoCalREN	SCE	SoCalGas
Baseline/Data Collection	<ul style="list-style-type: none"> SoCalREN is leveraging this program to collect measures replaced so annually incremental estimation of attributable electric savings can be measures (i.e., CFL replacements) 		<ul style="list-style-type: none"> Monthly progress report and written report on teacher enrollment activities

3. Comparable SoCalGas Program – LivingWise [SCG 3764]

LivingWise is a residential energy education and savings program delivered through schools. Southern California Gas Company (SoCalGas) collaborated with seven different California municipalities, utilities, or water agencies. The Program is a 6th grade Education model built on a proprietary Measure-Based Education (MBE) methodology. This results in students who readily engage in the teacher-led education within their school and are empowered by the hands-on, lab-based take-home measure installations within their homes. This personalized education program delivers increased energy literacy, optimum installation rates, and a deeper understanding of energy efficiency concepts, including Integrated Demand Side Management (IDSMS). Teachers are incentivized to implement the program in its entirety and return Student Surveys for EM&V reporting. The program optimizes energy savings and behavior change while supporting California state standards-based core classroom curriculum while enabling teachers to control the timing and pace of the program delivery.

4. Comparable SCE Program – N/A

5. Coordination Protocol Between Programs – N/A

6. Compliance with D.12.-11-015, SCR-RES-A3

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

Table 6: SoCalREN’s 2023 Kits for Kids Program Compliance With D.12-11-015

REN Criteria	SoCalREN Kits for Kids Program (SCR-RES- A3)
1. Activities IOU cannot or does not intend to undertake	Kits for Kids offers an online platform for students to learn about energy efficiency

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	Will emphasize HTR customers, DAC and Rural Communities

C. SOCALREN PUBLIC AGENCY ENERGY EFFICIENCY PROJECT DELIVERY PROGRAM, (SCR-PUBL-B1)

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. Savings attribution is channeled through the SCE, SoCalGas, and SoCalREN resource programs such as Metered Savings Program and Streamlined Savings Pathway because the SoCalREN Public Agency EE PDP is a non-resource program. 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

- a) 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.

- b) 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.
- c) Increase the ability of public agencies to meet local, regional, and state energy targets and policy goals.
- d) Increase the number of participating public agencies in the SoCalREN EE PDP across the entire regional territory, with an emphasis on HTR and DACs.
- e) To position public agencies and strategic regional partners to lead community awareness campaigns; engage stakeholders; build public awareness of local, regional, and state efforts; develop energy action plans with shovel ready project scopes; and drive participation in PA core resource programs.
- f) 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 7: SoCalREN Public Agency Energy Efficiency Project Delivery Program (PDP) and Other PAs’ Comparable Programs Summary

Program Parameters	SoCalREN	SCE	SoCalGas	I-REN
Target Audience (s)	Public Agencies: <ul style="list-style-type: none"> • Cities, counties, tribes, K-12 schools, local government hospitals and hospital districts, water districts, wastewater districts, sanitation districts, ports, airports, and other special districts. 	All eligible: <ul style="list-style-type: none"> • Local Government • Schools (K-12, local public and private primary and secondary education authorities) • Federal and Tribal Government 	All eligible: <ul style="list-style-type: none"> • Cities • Counties • Water/wastewater Districts • K-12 Schools • Special Districts • Tribes • POU's • Any Public Agencies 	<ul style="list-style-type: none"> • Counties of Riverside and San Bernardino • Cities, school districts, water districts, special districts, tribal communities • Disadvantaged, low income, other vulnerable communities • Community centers, libraries, senior centers, schools, fire and police buildings • Educational institutions
Resource or Non-Resource	Non-Resource	Resource	Resource & Non-Resource	Non-resource

Program Parameters	SoCalREN	SCE	SoCalGas	I-REN
Eligible Measures	N/A	Lighting, 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, Non-building or systems	N/A
Budget	\$6,489,000	\$6,590,401	\$2,051,023	\$2,908,219

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’ third-party programs provide public sector customers with technical assistance primarily focused on project technical and financial details but does not include pre-OBF 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 resource program pipelines. The following table compares the key program parameters of PAs’ public sector programs.

Table 8: Public Sector Program Comparison

Program Parameters	SoCalREN: EE Project Delivery Program	SCE Public Sector Programs	SoCalGas Public Sector Programs	I-REN Technical Assistance and Strategic Energy Planning Program
Types of Public Agencies Served	All eligible: <ul style="list-style-type: none"> ● Cities ● Counties ● Water/wastewater Districts ● K-12 Schools ● Special Districts ● Tribes 	All eligible: <ul style="list-style-type: none"> ● Local Government ● Schools (K-12, local public and private primary and secondary education authorities) ● Federal and Tribal Government 	All eligible: <ul style="list-style-type: none"> ● Cities ● Counties ● State Government ● Federal Government ● Water/wastewater Districts ● K-12 Schools ● Community Colleges ● & Universities ● Special Districts ● Tribes ● POUs ● Any Public Agencies 	<ul style="list-style-type: none"> ● Members of the I-REN COGs, counties, cities, school districts, water districts, special districts, and tribal communities ● Hard-to-reach, disadvantaged, low income, and other vulnerable communities ● Public sector facilities, community centers, libraries, senior centers, schools, and fire and police buildings ● Educational institutions
Resource/Non-resource	Non-resource	Resource	Resource and Non-Resource	Non-resource
Procurement Assistance	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	Support public agency staff in navigating procurement and approval process

Program Parameters	SoCalREN: EE Project Delivery Program	SCE Public Sector Programs	SoCalGas Public Sector Programs	I-REN Technical Assistance and Strategic Energy Planning Program
Technical Assistance	Customized technical engineering support from project identification to completion, including investment grade audits to identify all energy saving opportunities, technical performance specifications and provide construction management support.	Technical assistance, onsite or virtual assessments, potential for Strategic Energy Management (SEM) coaching	Customized technical assistance to identify all-natural gas energy saving opportunities.	Strategic energy planning; benchmarking; technical support to assess project options
Financial Support	<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>	SCE On-bill financing, alternative funds sourcing, and direct incentives	<p>Enhanced incentives for participation in downstream utility programs</p> <p>Support with financing and incentive applications and process through account representatives and/or Third Party implementers when applicable</p> <p>On-Bill Financing</p>	Provide information on I-REN financing options and other PA offerings

Program Parameters	SoCalREN: EE Project Delivery Program	SCE Public Sector Programs	SoCalGas Public Sector Programs	I-REN Technical Assistance and Strategic Energy Planning Program
Access to Energy Data	<p>Access to Utility API and ESPM data and customized reports to communicatedata.</p> <p>Benchmarkingsupport</p> <p>Detailed facility TOU loadprofiles</p>	<p>Agency usage-level dataon request</p> <p>Aggregate community-level data on request (EDRP Process)</p> <p>Green Button ConnectMy Data</p> <p>Energy Star Portfolio Manager</p> <p>Green Button DownloadMy Data</p> <p>Energy Atlas/CATALENA(under development)</p>	<p>Agency usage-level dataon request</p> <p>Aggregate community-level data on request (EDRP)</p> <p>Energy Atlas/CATALENA(under development)</p> <p>Automated electronic bill data delivery via secure file transfer protocol</p>	<p>Benchmarking and energy modeling support</p>
Energy Project Expertise to Implement Projects	<p>Provides support at each stage to each participatingagency through an assigned Project Manageralong with access to engineering and construction support</p>	<p>Provides support at the project identification and development phase through engineering assistance and SEM cohort workshops.</p>	<p>Account Representativesprovide project support</p> <p>Engineering support toall Public Sector customers</p> <p>Program Management support to coordinate technical assistance, leverage applicable Third-Party Program resources and engineering support</p>	<p>Support public agency decisionmakers and staff with concierge-style project management support</p>

Program Parameters	SoCalREN: EE Project Delivery Program	SCE Public Sector Programs	SoCalGas Public Sector Programs	I-REN Technical Assistance and Strategic Energy Planning Program
Community Marketing/ Outreach	<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>Development of a multi-touch, multi-channel approach to nurture customers along their energy efficiency journey in a customized, personalized, and timely way.</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>	<p>Outreach to local jurisdictions and agencies to educate them about the program offerings</p> <p>Create regionally-focused resources on public sector opportunities</p> <p>Collaborate with local governments, tribes, and special districts to design and deliver messaging to the community to promote local leadership in energy efficiency</p>
Sharing of Best Practices for Sustainability Efforts	<p>Sub-regional peer-to-peer workshops and trainings on relevant topics</p> <p>Access to shared online resources and learning communities</p> <p>Regular communication and coordination among Regional Partners and Advisory Committee members to share activities and best practices.</p>	<p>Achieved through SEM cohorts in training workshops and coaching sessions.</p>	<p>Regular communication with customers and regional events, support and coordinate with Third Party programs, Peer-to-peer meetings, Regional meetings</p>	<ul style="list-style-type: none"> • Convene stakeholders for strategic energy planning • Create local case studies to showcase achievements in the region <p>Create, distribute and promote regionally-focused tools and resources through e-communicators, social media, web, and at in-person events.</p>

3. Comparable SCE Programs – Local Public Sector Third-Party Program and Statewide Water/Wastewater Pumping Efficiency

SCE contracted with CLEAR result to deliver the Public Energy Performance program (PEP) to target the local public sector. PEP combines traditional efficiency programs with supported energy

action plan implementation and Strategic Energy Management. Strategic Energy Management (SEM) is a holistic, whole facility approach that uses Normalized Meter Energy Consumption (NMEC) and dynamic baseline model to determine energy savings from all program activity at the facility, including capital projects, custom and deemed calculated retrofits, maintenance and operation, and retro-commissioning projects. SEM for the public sector requires a multi-year customer commitment to participation in multiple cohort-type training workshops, individual or cohort energy analysis site and Measurement and Evaluation (M&V) activities based on information and characteristics of the facility's specific operations.

SCE's Statewide Water/Wastewater Pumping program is currently in solicitation and is expected to be in market around Q4 2022 to be delivered by the contracted third-party implementer. SCE's existing 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's WISE program stopped taking new program enrollment in 2019 but will continue to service the existing pipeline of projects until the new statewide water/wastewater program(s) begin implementation.

The Statewide Higher Education solicitation concluded in Q1 2022. SCE filed the advice letter and will provide notice once the implementation plan has been uploaded to CEDARS.

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 POU's), 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.

In 2023, SoCalGas Public Sector Programs will transition from the 12 Local Government Partnership Programs (LGP) to a regional model (Public Sector Energy Pathways) that provides services and support to the broader public sector customers along with Public Sector Third Party programs. A Third Party implemented resource program (SCG3846) for small and medium public sector customers has been launched in 2021. This Third Party program is a turnkey cost-effective end-to-end solution for small and medium public sector customers. A Third Party program aimed at large public sector customers is currently being solicited and scheduled to launch in 2023. SoCalGas Public Sector Programs portfolio is designed to support all Public Sector customers including local governments and special districts in the following areas:

Government and Public Agency Facilities

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

Sustainability Support

- ✓ Benchmarking
- ✓ Guiding Document Support
- ✓ Peer to Peer Support, Best Practices

Core and Third Party Program Coordination

- ✓ Outreach & Education (WE&T, 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 2023 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. Focused or tailored 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. Comparable I-REN Program – Public Sector Technical Assistance and Strategic Energy Planning Program – IREN-PUBL-001

I-REN's Public Sector Technical Assistance and Strategic Energy Planning Program will provide short-term and mid-term technical support for local governments, special districts, school districts, and tribes to increase energy efficiency in publicly-owned facilities. The program will provide additional support and technical services to design high performing, energy efficient buildings.

The program will implement a strategy of developing a regional Building Upgrade Concierge (BUC) for local governments, special districts, and tribal communities with technical guidance and tools to inform and enable priority energy improvements. I-REN will provide person-to-person support for local governments to get higher levels of assistance and support for their energy efficiency projects, through concierge-style support to help fill gaps in staff capacity and resources at these local government jurisdictions.

I-REN's technical assistance support will build local government's capacity to tackle complex projects, from helping with benchmarking to navigating options and approaches for maximizing their investments and energy savings. I-REN will offer person-to-person support to help these local governments in making efficient equipment purchases and to implement energy efficiency projects. Resulting energy bill savings will benefit local governments and contribute to both local and statewide goals for energy efficiency and greenhouse gas reduction.

I-REN will also develop or enhance strategic energy plans to connect local government goals related to climate, resilience, and economic development to energy efficiency programs and adoption. Through this tactic I-REN will assess the current state of strategic energy planning and provide technical assistance to begin the process or help move the process forward, working in collaboration with jurisdiction stakeholders.

In addition, I-REN will create resources for the public sector to tap into EE and distributed energy resources programs offered by other providers and IOUs, acting as a clearinghouse for information about energy efficiency programs available in the region for the public sector, and will create and promote tools and resources to increase energy efficiency program participation among

their constituents.

I-REN will offer person-to-person concierge technical support services to serve the needs of public sector customers in its territory, including but not limited to strategic energy planning and procurement and project management assistance. I-REN will focus on underserved local governments including tribal communities with targeted non-resource efforts to drive participation to IOU programs and use information technology to help improve public sector customers' and local governments' access to energy efficiency opportunities. While the program will be open to all public building types, there will be a focus on community-serving buildings such as community centers, libraries, senior centers, schools, and fire and police buildings. I-REN will leverage its existing public sector partnerships and networks across the region to deliver personalized services through this program. Location of services in Riverside and San Bernardino counties, especially in underserved jurisdictions, and a more localized focus will differentiate I-REN's program from other comparable offerings.

6. 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. The Coordination Plan is a living document and updated as needs arise for improved and enhanced protocols. This same document will be used as the coordination protocol for the EE PD Program, DER DAC Program, Streamlined Savings Pathway, 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 SCE-specific "project coordination call." A monthly SoCalGas monthly project coordination call will be established in Q2 or Q3 2023. The Joint PAs will make each other aware of programs and resources available, including public sector programs. The IOUs will also provide notice once advice letters have been filed and implementation plans have been uploaded to CEDARS of any new program similar to SoCalREN's public programs.

At that time, the Joint PAs will work to update coordination documents.

SoCalREN coordinates with the IOUs and other relevant third-party or LGP stakeholders prior to any in-person engagement meeting to enroll a new agency. This "pre-coordination" 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 2023 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.

As a new PA, I-REN has not yet contracted with implementers. Within 60 days of implementer(s) being contracted for the relevant programs, the Joint PAs will reconvene to plan coordination activities specific to any I-REN program(s).

7. Coordination between SW program (s)

The IOUs will also provide notice once advice letters have been filed and implementation plans have been uploaded to CEDARS for the statewide water/wastewater program(s). At that time, the Joint PAs will work to determine best method of coordination with the statewide water/wastewater program(s).

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

The following table describes in further detail how SoCalREN's EE PDP programs satisfies the REN criteria in D.12-11-015.

Table 9: SoCalREN’s 2023 EE PD Program Compliance with D.12-11-015

REN Criteria	SoCalREN Public Agency EE Project Delivery Program (SCR-PUBL-B1)
<p>1. Activities IOU cannot or does not intend to undertake</p>	<ul style="list-style-type: none"> ✓ 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. Traditionally, IOU programs’ public sector technical assistance primarily focuses on project technical and financial details but does not include procurement assistance or construction management support. ✓ 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 implementing EE projects in their communities.
<p>2. Pilot activities where there is no IOU program offering and where there is potential for scalability</p>	<p>N/A</p>
<p>3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap</p>	<p>N/A</p>

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 recommendations for the integration of DERs in implementation of EE projects. This Program is offered within DACs, rural, and low-income communities. Similar to SoCalREN’s existing Public Agency Energy Efficiency Project Delivery Program, the Distributed Energy Resource Disadvantaged Communities 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 and sustainability strategy implementation for all public agencies serving DACs, rural, and low-income communities, with

the goal of maximizing EE opportunities, while driving the integration of DERs to enable public agencies to achieve ZNE. SoCalREN DER DAC PDP implements program enhancements to its existing Energy Efficiency Project Delivery platform to include services that deliver DER and sustainability measure opportunity identification during EE audits, high level 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 and resiliency 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 equity-related energy goals.
- c) Increase the number of public agencies participating in SoCalREN's EE programs, with an emphasis on DACs, rural, and low-income 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 10: SoCalREN Public Agency DER DAC Project Delivery Program Summary

Program Parameters	SoCalREN	SCE	SoCalGas
Target Audience (s)	Public Agencies in DAC, rural, and low income communities: <ul style="list-style-type: none"> ✓ Cities, counties, tribes, local government hospitals and hospital districts, K-12 schools, water districts, wastewater districts, sanitation districts, ports, airports, and other 	N/A	N/A
Resource or Non-Resource	Non-Resource	N/A	N/A
Eligible Measures	N/A	N/A	N/A
Budget	\$3,813,000	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 resources and high-level information for each of the DER resource areas so participating agencies are knowledgeable about opportunities to combine DERs and energy efficiency
- ✓ 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 to demonstrate essential components of the 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 (California Energy Commission (CEC) American Recovery and Reinvestment Act (ARRA) funding) the program has expanded its services offered to include DER technical assistance, on-site benchmarking, and water efficiency into participating projects.² Technical assistance may include DER measure audits and development of technical performance specifications which are not currently offered through the existing EE ratepayer 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 11: Public Agency DER DAC Program Comparison

Program Parameters	SoCalREN DER DAC PDP	SCG/SCE Customized and Third Party Program
Eligible Facilities	Buildings and Non-building facilities, e.g., exterior lighting (incl. Street lighting)	Buildings and Non-building facilities
Eligible Agencies	Eligible DAC, rural, and low- income Public Agencies only	All non-residential customers
Eligible Measures	Measures that may result in energy savings, energy generation, demand response savings or water savings	Measures that deliver to-code and above-code energy savings

² 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.

Program Parameters	SoCalREN DER DAC PDP	SCG/SCE Customized and Third Party Program
Technical Assistance	Benchmarking support, Project Management, Financial Analysis & Services, Incentives Support, Auditing, Procurement support, technical specifications, and construction support	Third Party implementer
Performance Payment	No monetary incentives	Monetary incentives
Resource or Non-Resource	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
Approval Process	None as the agency would be guided to EE resource programs as well as DER programs, e.g., SGIP, DR participation	Project application process by third-party implementer but with SCE project engineering review.
2023 status	In market since April 2019 and Accepting new projects for 2023	Accepting new projects
Funding	<ul style="list-style-type: none"> ✓ CPUC EE Ratepayer Funds ✓ American Recovery and Reinvestment Act (ARRA) and other sources 	CPUC EE

3. Comparable Joint PA Program

Currently there is no comparable program to the proposed SoCalREN Public Agency DER DAC PDP in any other Joint PA’s EE portfolio. The IOUs 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 programs in the other Joint PAs’ respective EE

portfolios, 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. Additionally, should the IOU's third-party solicitation result in a similar program design, the IOUs will notify SoCalREN in the same manner as discussed above.

5. Coordination Between SW Program (s)

The IOUs will also provide notice once advice letters have been filed and implementation plans have been uploaded to CEDARS for the statewide water/wastewater program(s). At that time, the Joint PAs will work to determine best method of coordination with the statewide water/wastewater program(s). SoCalREN will adhere to the coordination protocols (Appendix E) that outline coordination processes. The document may be updated as needed as the parties learn more about the structure of the program.

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 12: SoCalREN’s 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"> ✓ One-stop end-to-end service delivery focused on all available EE and 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.
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	<ul style="list-style-type: none"> ✓ Maximizing EE opportunities, while driving the integration of DERs (energy storage, demand response, energy management, and water efficiency optimization) and increasing understanding of ZNE- pathways. ✓ Assists public agencies in understanding their choices and drives greater participation and higher adoption of DER programs, including all IOU partner programs. ✓ Designed to support upgrades of public agency buildings and facilities with an emphasis on supporting projects that serve DACs, rural, and low-income communities.
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	<ul style="list-style-type: none"> ✓ Currently only available to DACs which fall within the recently adopted HTR definition as well as rural and low-income communities; ✓ This program will indirectly support HTR communities by encouraging public agencies to further building decarbonization and drive GHG reductions.

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

Under the Public Agency NMEC Program, SoCalREN employs a NMEC framework and targets projects that are identified by the SoCalREN EE PDP or SoCalREN DER DAC program and are limited by support and incentives through existing EE programs. This Program enables agencies to pursue stranded energy savings potential in public agency facilities and buildings. The NMEC program unlocks ongoing support through energy efficiency project implementation and beyond. It also offers a stop gap program after the closure of SCE’s Performance Based Retrofit Program to new applications and ahead of the full launch and implementation of SCE’s anticipated Public Sector program.

This Program is a resource program, so EE savings from these projects contribute to SoCalREN program goals and cost-effectiveness calculations. The program targets DAC, rural, and low-income communities by offering increased incentives for these equity communities.

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, with a focus on underserved public agencies.
- ✓ Provide training and educational materials to facility personnel to ensure persistence of savings.
- ✓ Increase deep energy retrofits, reduce grid impacts, and motivate GHG emission reductions in the public sector.

2. Summary of Program Differentiation

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

Table 13: SoCalREN, SCE, SoCalGas and I-REN NMEC-Based Programs Summary

Program Parameters	SoCalREN Public Agency NMEC Program, (SCR-PUBL-B3)	SCE CLEAResult Public Energy Performance Program	SoCalGas High Opportunity Projects and Performance-Based Retrofits (MPBR) Program	I-REN Public Buildings Normalized Metered Energy Consumption (NMEC) Program – I-REN-PUBL-002
Target Audience (s)	Public Agencies: <ul style="list-style-type: none"> • Cities, counties, tribes, local government hospitals and hospital districts, water districts, K-12 schools, wastewater districts, sanitation districts, ports, airports, and other special districts. 	<ul style="list-style-type: none"> • Local Government • Schools (K-12, local public and private primary and secondary education authorities) 	Public Sector	<ul style="list-style-type: none"> • Members of the I-REN COGs, counties, cities, school districts, water districts, special districts, and tribal communities • Hard-to-reach, disadvantaged, low income, and other vulnerable communities • Community centers, libraries, senior centers, schools, and fire and police buildings • Educational institutions
Resource or Non-Resource	Resource	Resource	Resource	Resource

Program Parameters	SoCalREN Public Agency NMEC Program, (SCR-PUBL-B3)	SCE CLEAResult Public Energy Performance Program	SoCalGas High Opportunity Projects and Performance-Based Retrofits (MPBR) Program	I-REN Public Buildings Normalized Metered Energy Consumption (NMEC) Program – I-REN-PUBL-002
Eligible Measures	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	Any measure that reduces energy usage including but not limited to HVAC, controls, foodservice, appliances, water heating, lighting
Budget¹³	\$1,300,000	\$6,590,401	\$450,000	\$3,283,503

SoCalREN will target agencies who are enrolled in the EE PDP and DER DAC EE PDP and have facilities that have not recently 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, application technical review, staff training, and facility savings reports to ensure persistence of savings while adhering to CPUC NMEC Guidelines that go through the CMPA process. The SoCalREN Public Agency NMEC Program differs from the IOUs NMEC programs by providing staff training, regular savings reports post installation, and a focus on equity through the provision of enhanced incentives for equity communities.

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.

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

Table 14: NMEC-Based Program Comparison

Program Parameters	SoCalREN NMEC Program	SCE CLEAResult Public Energy Performance Program	SoCalGas HOPPs Program	I-REN Public Buildings Normalized Metered Energy Consumption (NMEC) Program – IREN-PUBL-002
Eligible Facilities	Buildings	Buildings	Buildings	<ul style="list-style-type: none"> Buildings and non-facilities (e.g., exterior lighting) Special focus on community centers, libraries, senior centers, schools, and fire and police buildings
Eligible Agencies	Eligible sub-segment of Public Agencies (target DACs, rural, low-income communities)	<ul style="list-style-type: none"> Local Government Schools (K-12, local public and private primary and secondary education authorities) 	All Public Sector	Counties, cities, school districts, water districts, special districts, and tribal communities
Eligible Measures	Any measure that reduces energy usage	Any measure that reduces energy usage	Any measure that reduces energy usage to achieve 20% savings and a minimum of 7,000 Therms	Any measure that reduces energy usage including but not limited to HVAC, controls, foodservice, appliances, water heating, lighting
Technical Assistance	Modeling and M&V Plan, post implementation training, performance tracking and savings persistence	Technical assistance, onsite or virtual assessments, potential for Strategic Energy Management (SEM) coaching	M&V Plan, facility audits, energy efficiency education related to retrofits, performance tracking and savings persistence	Project scope development, procurement assistance, project management, operations and commissioning
Measurement	CMPA (IPMVP Option C)	CMPA (IPMVP Option C)	CMPA (IPMVP Option C)	TBD
Baseline	Existing conditions	Existing Conditions	Existing Conditions	Existing conditions

Program Parameters	SoCalREN NMEC Program	SCE CLEAResult Public Energy Performance Program	SoCalGas HOPPs Program	I-REN Public Buildings Normalized Metered Energy Consumption (NMEC) Program – IREN-PUBL-002
Performance Payment	Incentives provided in two phases: 1) post-implementation and 2) post-implementation measurement and verification of savings	Incentives dependent on implementer’s forthcoming implementation plan	Incentives provided on a post-implementation measurement of energy savings based on meter data.	Incentive payment based on energy savings achieved over 3-5 years
Resource or Non-Resource	Resource	Resource	Resource	Resource
Approval Process	Streamlined Process within CPUC NMEC Guidelines that will go through the CMPA	Approval process dependent on implementer’s forthcoming implementation plan but will adhere to NMEC Rulebook	CPUC HOPPs Guidelines	TBD
2023 status	In the market as of April 2019, accepting new projects	Will begin accepting new projects upon approval by CPUC	Accepting new projects	New/launching

3. Comparable SCE Public Sector Program – CLEAResult Public Energy Performance

CLEAResult’s PEP program will provide comprehensive solutions for public sector customers throughout SCE’s service territory PEP program. As described above, the PEP program will employ a mix of deemed, normalized metered energy consumption (NMEC), and custom measures. In addition to these downstream approaches, the PEP program contains a strategic energy management (SEM) approach in the public sector.

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. Comparable I-REN Program – Public Buildings NMEC Program – IREN-PUBL-002

I-REN’s Public Sector—Public Buildings Normalized Metered Energy Consumption (NMEC) Program is a resource program (in year two of I-REN program administration) to provide incentives and financing for savings based on NMEC achieved over three to five years, with a special focus on HVAC improvements to community-serving buildings. The program’s objectives are to allow local governments to leverage an innovative approach that goes beyond code to achieve deep energy savings, and to help local governments afford and finance a range of energy efficiency upgrades.

6. Coordination Protocol Between Programs

As part of the Public Sector program coordination call, the Joint PAs will discuss marketing campaigns, continued coordination, any issues impacting the Joint PA implemented programs, and to learn about updates of other programs. The IOUs will also provide notice once advice letters have been filed and implementation plans have been uploaded to CEDARS of any new program similar to SoCalREN’s public programs. 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. Upon notification, the Joint PAs will work to update coordination documents. As a new

PA, I-REN has not yet contracted with implementers. Within 60 days of implementer(s) being contracted for the relevant programs, the Joint PAs will reconvene to plan coordination activities specifically related to I-REN.

7. 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.

8. 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 15: SoCalREN’s 2023 Public Agency NMEC Program Compliance with D.12-11-015

REN Criteria	SoCalREN Public Agency NMEC Program (SCR-PUBL-B1)
1. Activities IOU cannot or does not intend to undertake	<ul style="list-style-type: none"> ✓ A program design that offers an alternative to traditional rebate/incentive programs – incentives based on GHG emission reductions with increased incentive levels to equity communities. ✓ Performance incentives based on GHG emission reductions available to underserved and DAC communities.
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	<ul style="list-style-type: none"> ✓ Designed to support upgrades of public agency buildings and facilities including prioritizing projects that serve DACs, rural, and low income communities.

F. SOCIALREN PUBLIC AGENCY STREAMLINED SAVINGS PATHWAY, (SCR-PUBL-B4)

The SoCalREN Streamlined Savings Pathway (SSP) program serves as a temporary gap-filling program that will supplement the public sector segment while waiting for new third party IOU

programs to be on-boarded and enter the market. The program is designed to leverage both a deemed and custom approach to processing public agency projects that maximizes savings opportunities while minimizing processing times and will focus on electric measures only due to SoCalGas's holistic Third Party public agency program already in place. Public Agencies and the SoCalREN non-resource programs are highly dependent on IOU incentive programs. The SSP's primary objective is to ensure there is no gap in the market and to support the continued momentum of public agency project delivery.

This program is proposed to be piloted in 2022, and if needed 2023. The program will target local public agency projects that emphasize energy efficiency improvements in DACs, rural and underserved communities.

1. Summary of Program Objectives

- ✓ Meet REN criteria by addressing market segment gaps left by IOU program closures and third-party program limitations
- ✓ Maximize savings opportunities while minimizing processing times
- ✓ Focus on electric measures only due to SCG's holistic Public Sector Third Party program already in market
- ✓ Target public agencies with a focus on equity by providing higher incentives, based on deep energy reductions, to underserved communities
- ✓ Increase deep energy retrofits, reduce grid impacts, and motivate GHG emission reductions in the public sector.

2. Summary of Program Differentiation

The following table provides a summary of the PAs' available programs for 2023 Public Sector.

Table 16: SoCalREN, SCE, and SoCalGas Public Agency-Based Resource Programs Summary

Program Parameters	SoCalREN SSP (SCR-PUBL-B4)	SCE – CLEAResult Public Energy Performance Program	SoCalGas Public – Deemed Public - Calculated 3PP for Public
Target Audience (s)	Public Agencies: Cities, counties, tribes, local government hospitals and hospital districts, water districts, K- 12 schools, wastewater districts, sanitation districts, ports, airports, and other special districts	Local Government Schools (K-12, local public and private primary and secondary education)	All Public Agencies that include but not limit to cities, counties, local governments, public K- 12 schools, special districts, federal governments and agencies, Indian tribes, water districts
Resource or Non-Resource	Resource	Resource	Resource
Eligible Measures	Custom and deemed	Custom, Deemed, NMEC and SEM	Custom, Deemed and Direct Install
Budget	\$1,400,000	\$6,590,194	\$4,300,000

SoCalREN will target agencies who are enrolled in the EE PDP and DER DAC and have facilities that have not recently participated in utility programs. Participating agencies also benefit from the SoCalREN Program’s program management expertise and technical services. In addition, this program will build off lessons learned regarding IOU incentive program challenges and institute process improvements regarding incentive application review /processing thus alleviating project lag due to program performance. This streamlined efficiency could become a model for best practices in the future.

Table 17: Public Agency Resource Incentive Programs Comparison

Program Parameters	SoCalREN SSP Program	SCE - CLEAResult Public Energy Performance Program	SoCalGas
Eligible Facilities	Buildings and Non-building facilities; e.g., exterior lighting (incl. Street lighting)	Buildings and Non-buildings, Systems	Buildings and Non-buildings, Systems
Eligible Agencies	Eligible sub-segment of Public Agencies (target DACs, rural, low-income communities)	<ul style="list-style-type: none"> Local Government Schools (K-12, local public and private primary and secondary education) 	All Public Agencies
Eligible Measures	HVAC, Lighting, Commercial Refrigeration, Food Service, building envelope, appliance plug load, pumping, process optimization	Lighting, HVAC, Process, Food Service, Whole Building, Motors, Office Equipment, Building Envelope, Refrigeration	HVAC, water heating, steam plant/system, building envelope, food service equipment; gas engine, system optimization
Technical Assistance	Will leverage PDP and DER DAC offerings included above under program details.	Technical assistance, onsite or virtual assessments, potential for Strategic Energy Management (SEM) coaching	Technical assistance and EE audits
Measurement	Deemed and Custom	Custom, Deemed, NMEC and SEM	Custom, Deemed and Direct Install
Approval	Deemed and Custom	Approval process dependent on implementer's forthcoming implementation plan with SCE engineering project technical review	

Program Parameters	SoCalREN SSP Program	SCE - CLEAResult Public Energy Performance Program	SoCalGas
Performance Payment	Incentives based on lifetime GHGs avoided	Incentives will be established in the forthcoming program implementation plan	Incentive and rebate
Resource or Non-Resource	Resource	Resource	Resource

3. Comparable SCE Public Program – SCE Third Party Public Program(s)

CLEAResult’s PEP program will provide comprehensive solutions for public sector customers throughout SCE’s service territory PEP program. The PEP program will employ a mix of deemed, normalized metered energy consumption (NMEC), and custom measures. In addition to these downstream approaches, the PEP program contains a strategic energy management (SEM) approach in the public sector. SCE’s statewide water/wastewater solicitation will be releasing RFP in Q3 2021 with an expected selection by Q2 2022. The statewide higher education solicitation is in the RFP stage with an expected selection by Q1 2022. SCE will provide notice once advice letters have been filed and implementation plans have been uploaded to CEDARS of any new program similar to SoCalREN’s public programs.

4. Comparable SoCalGas Public Program – N/A

No gas measures

5. Coordination Protocol Between Programs

A focus on collaboration of the PAs is critical to this program’s success. As with SoCalREN’s other programs, SoCalREN will include coordination on this program with its monthly program coordination meetings specifically with the other relevant Joint PAs. SoCalREN will also utilize the document titled “SoCalREN-IOU Coordination Plan for Public Agencies” as the coordination protocol for this program as it does for its other programs. 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" (to be established for SCG in 2023). The Joint PAs will make the e aware of programs and resources available, including public sector programs. The IOU’s will also provide notice once advice letters have been filed and implementation plans have been uploaded to CEDARS of any new program similar to SoCalREN’s public programs. At that time, the Joint PAs will work to update coordination documents.

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

7. Compliance With D.12-11-015, SCR-PUBL – B4

The following table describes in further detail how SoCalREN’s Public Agency Streamlined

Table 18: Savings Program satisfies the REN criteria in D.12-11-015.

REN Criteria	SoCalREN Public Agency Streamlined Savings Program (SCR-PUBL- B4)
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	<ul style="list-style-type: none"> • Program addresses gaps left by IOU program closures and third party program limitations; SoCalREN will launch the Streamlined Savings Pathway in Q1 of 2023 and adjust as needed to not duplicate offerings as new third party programs are introduced to the market. • This program offers Public Agencies no loss in available services
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	

G. 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, rural, and

low- income communities. 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 19: SoCalREN, SCE and SoCalGas Public Sector Financing Programs Summary

Program Parameters	SoCalREN Public Agency RLF, (SCR- FIN-C1)	SCE On-Bill Financing [SCE- 13- SW-007A]	SoCalGas – On-Bill Financing [SCG3735]
Target Audience (s)	Public Agencies: <ul style="list-style-type: none"> ✓ Cities, counties, tribes, K-12, local government hospitals and hospital districts, water districts, wastewater districts, sanitation districts, ports, airports, and 	All non-residential customers, including all Public Sector customers	All non-residential customers, including all Public Sector customers

	other special districts.		
Resource or Non-Resource	Non-resource	Resource	Resource
Eligible Measures	N/A	N/A	N/A
Budget	\$550,000 (CPUC Funds) (\$2,200,000 Non CPUC funds)	\$781,544 (implementation budget) \$14,000,000 (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, zero-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 OBF programs that rely on California 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 Joint PAs’ Public Sector financing Programs.

Table 20: Public Sector Financing Program Comparison

Program Parameters	SoCalREN: Revolving Loan Fund (RLF)	SCE comparable program: On-Bill Financing (OBF)	SoCalGas comparable program: On-Bill Financing (OBF)
Amount Financed	100% of project costs up to Program cap (no incentive provided)	Qualifying project cost, less approved rebates and incentives, up to Program cap by meter	Qualifying project cost, less approved rebates and incentives, up to Program cap by meter

Program Parameters	SoCalREN: Revolving Loan Fund (RLF)	SCE comparable program: On-Bill Financing (OBF)	SoCalGas comparable program: On-Bill Financing (OBF)
Timing of Loan Funds Distribution	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.
Source of funds leveraged for financing	Non-ratepayer funding (ratepayer funds used for administration)	Ratepayer funding	Ratepayer funding
Term	Up to 5 years, regardless of installed equipment	Up to 10 years or EUL of installed equipment	Up to 15 years or EUL of installed equipment
Eligible Measures	All measures related to an EE project	Measures with Utility rebates and incentives	Measures with Utility rebates and incentives
Annual % interest rate	0%	0%	0%
Other Fees	One-time Administrative Fee	None	None
Repayment	Off-Bill	On-Bill	On-Bill

3. Comparable SCE and SoCalGas – 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. 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. Additionally, should the IOU's third-party solicitation result in a similar program design, the IOUs will notify SoCalREN as above.

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). The CAEATFA programs focus on small business and residential customers at this time, and thus SoCalREN's program does not substantially overlap.

The Joint PAs will also 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 21: SoCalREN’s 2023 Public Agency RLF Program Compliance with D.12-11-015

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

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 small and 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), Hard to Reach (HTR) and small, women, minority, and disabled veteran owned business enterprises (SWMDVBE). The primary goal of this Program is 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 DAW/HTRs and SWMDVBE contractors of all skill levels; 2) entry-level

workforce skills training for in-school youths 3) SWMDVBE contractors' local government public agency training and capacity building in regard to sustainability projects and RFPs; and 4) a green career pathway for classified at-risk and or homeless individuals, such as transition age at-risk foster 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 at-risk youth or 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 22: SoCalREN, SCE, SoCalGas, 3C-REN, and I-REN WE&T Programs Summary

Program Parameters	SoCalREN WE&T(SCR-WET-D1)	SCE WE&T Integrated Energy Education & Training Program –[SCE-13-SW-010A]	SoCalGas WE&T Integrated Energy Efficiency Training(IEET) [SCG3729]	3C-REN Workforce Education & Training (TCR-WET-001)	I-REN WE&T Programs
Target Audience (s)	<ul style="list-style-type: none"> Architects, designers, engineers, contractors, building operators, technicians, craft/tradesmen, customers, youth, classified disadvantaged workers, and building owners SWMDVBE that can potentially support IOU resource program sectors and local publicagencies sustainability projects. Homeless (i.e., at-risk transition youth) 	Workers who are in or are pursuing occupations in the energy efficiency and other related professional fields that provide the technical capabilities that are needed to support the attainment of CAs and IOU Energy Saving and sustainability targets.	Workers in or pursuing occupations that can provide professional and technical capabilities needed by IOU resource program sectors.	Locally licensed public and private building professionals needing more in-depth training, such as contractors, HVAC, engineers, architects, designers, certified energy managers, local jurisdictions’ building & safety department staff, lighting professionals, real estate professionals, raters, entry-level workers, students, and professionals in DACs and HTR areas, and educational institutions, as well as other key market actors.	<p>WE&T Training and Education Program— IREN-WET-001</p> <ul style="list-style-type: none"> Local providers, including higher education providers, high schools, adult schools, and professional training companies Disadvantaged communities (DACs) <p>WE&T Workforce Development Program— IREN-WET-001</p> <ul style="list-style-type: none"> State, regional, and local stakeholders, including workforce investment boards (WIBs) and economic development departments Job seekers, including students; individuals who are unemployed, or underemployed; job seekers looking to enter the energy efficiency and advanced energy industry; and job seekers currently working in the industry who seek to make lateral career moves or advance in their fields.

Program Parameters	SoCalREN WE&T(SCR-WET-D1)	SCE WE&T Integrated Energy Education & Training Program –[SCE-13-SW-010A]	SoCalGas WE&T Integrated Energy Efficiency Training(IEET) [SCG3729]	3C-REN Workforce Education & Training (TCR-WET-001)	I-REN WE&T Programs
Resource or Non-Resource	Non-resource	Non-resource	Non-resource	Non-resource	Non-resource
Eligible Measures	N/A	N/A	N/A	N/A	N/A
Budget	\$800,000	\$8,840,814	\$4,350,000	\$1,910,021	WE&T Training and Education Program— IREN-WET-001 \$1,032,169 WE&T Workforce Development Program— IREN-WET-001 \$1,361,257

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) SWMDVBE contractor training;(3) in-school youth; and (4) at-risk youth (i.e., homeless, transitioning foster youth)so that these segments are enabled with pathways and training for certifications and credentials in energy-related industries. 3C-REN’s WE&T program is differentiated from the other Joint PAs’ programs by its focus on local building professionals, including those in HTR and DAC areas, within the counties of Ventura, Santa Barbara, and San Luis Obispo.

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

Table 23: WE&T Program Comparison

Program Parameters	SoCalREN WE&T	SCE WE&T Integrated Energy Education & Training Program	SoCalGas WE&T Integrate Energy Education Training Program	3C-REN WE&T	I-REN WE&T Programs
Target Audience	<ul style="list-style-type: none"> • Targets the most underserved and disadvantaged workers (DAW) and Hard to Reach (HTR) • SWMDVBE that can potentially support IOU resource program sectors and local public agencies sustainability projects. • Homeless (i.e., at- risk transition youth) 	Workers who are in or are pursuing occupations in the energy efficiency and other related professional fields that provide the technical capabilities that are needed to support the attainment of CAs and IOU Energy Saving and sustainability targets.	Emphasis on Trade professionals and Workers in occupations supporting IOU resource program sectors, as well as food service commercial sector	<ul style="list-style-type: none"> • Emphasis on local building professionals needing more in-depth training. • Building professionals targeted include those in DACs and HTR areas, as well as other key market actors to help build a complete workforce. 	<p>WE&T Training and Education Program</p> <ul style="list-style-type: none"> • Local providers, including higher education providers, high schools, adult schools, and professional training companies • Disadvantaged communities (DACs) <p>WE&T Workforce Development Program Job seekers, including students; individuals who are unemployed, or underemployed; job seekers looking to enter the energy efficiency and advanced energy industry; and job seekers currently working in the industry who seek to make lateral career moves or advance in their fields.</p>
Location of Training	<ul style="list-style-type: none"> • Through local public agency training channels • In field and online 	<ul style="list-style-type: none"> • Energy Education Centers (Irwindale / Tulare) • Alternative training sites (On Location) • Virtual (Live Instructor Led) • Online On-Demand 	Training to be conducted at SoCalGas’ Energy Resource Center, alternative training sites, and through other distribution channels such as virtual and on-demand, in collaboration with industry and other training providers, as appropriate, for reaching	<ul style="list-style-type: none"> • In-person • Online • On-Demand 	<p>WE&T Training and Education Program</p> <ul style="list-style-type: none"> • In field/on-the-job • Online <p>WE&T Workforce Development Program N/A</p>

Program Parameters	SoCalREN WE&T	SCE WE&T Integrated Energy Education & Training Program	SoCalGas WE&T Integrated Energy Education Training Program	3C-REN WE&T	I-REN WE&T Programs
Training Types	In-person/online	In-person/online	In-person/online	In-person/online	WE&T Training and Education Program <ul style="list-style-type: none"> In-person/online Online WE&T Workforce Development Program N/A
Statewide/Local	Local	Statewide/local	Statewide/local	Local	Local
Partner Organization	<ul style="list-style-type: none"> Public Agencies Nonprofit organizations High schools Community Colleges Unions 3rd party implementers Workforce centers 	<ul style="list-style-type: none"> Other IOUs Industry associations Post-secondary education providers Business networks Regional Workforce Services Non-Profit Organizations 	Other IOUs, industry associations, post-secondary education, business networks, regional workforce services, and potential collaborators with common objectives of addressing EE workforce needs	<ul style="list-style-type: none"> Job placement entities Regional educational providers Local non-profit energy service providers Community Colleges 	WE&T Training and Education Program <ul style="list-style-type: none"> Educational institutions Trade associations Industry and non-profit organizations Certification organizations Government agencies WE&T Workforce Development Program State, regional, and local stakeholders, including workforce investment boards (WIBs) and economic development departments

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 WE&T Integrated Energy Education & Training Program (IEET) offers resources and training programs that are aimed at shaping the current and future energy workforce through a series of occupational-, employer-, and technology-focused workshops and seminars, combined with workplace-based and hands-on technical training. This program aims to provide pathways to, and training for certifications and credentials in energy efficiency-related industries that also support California’s clean energy objectives.

In addition to the training courses offered, SCE maintains a Foodservice Technology Center where training is conducted, standards-based equipment is tested, and evaluations that further enhance the commercialization of emerging energy efficient technologies and programs. These services are delivered with technical integrity and scientific rigor 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, conduct technical tours, provide consultations, and offer on-site energy audits; all of which are available at no-cost to the customer.

5. Comparable 3C-REN WE&T Program – Workforce, Education & Training Program – [TCR-WET-001]

The 3C-REN Building Performance Training program offers career pathways and enrichment by providing access to in-person, on-demand, and on-line trainings; mentorship opportunities; and

cross promotion of IOU workforce trainings, engaging hard-to-reach (HTR) workers and those in identified disadvantaged communities (DACs). The 3C-REN delivers technical and soft skill trainings and certifications focused on high performance buildings. The program supports building professionals and those seeking career pathways in residential and commercial design, construction, and related industries.

The 3C-REN WE&T program has a goal to expand its partnerships to develop local career pathway options in building performance. This will be done by talking to career pathway programs established in the Tri-County area and identifying opportunities for collaboration and cross promotion. The program seeks to expand its engagement with career pathway stakeholders, such as community colleges, high schools, and workforce investment boards. The 3C-REN applies a holistic approach to the market with highly targeted training events, using apprenticeship and mentoring style models to enhance the workforce within the 3C-REN territory. 3C-REN's workforce training program goes beyond the classroom setting and skills are reinforced with real world on- the-job applications, while simultaneously influencing direct energy savings. As a result of a stronger workforce skills base, building professionals will increase efficiency and efficacy with existing resources.

6. Comparable I-REN WE&T Programs

Training and Education Program — IREN-WET-001

For its Cross-cutting Sector Workforce Education & Training (WE&T) Training and Education Program, I-REN will assess the current training marketplace in the Inland Empire and work with local providers, including higher education providers, high schools, adult schools, and professional training companies to tailor content to be relevant to the region's needs and ensure that disadvantaged communities are a focus. I-REN will collaborate with training providers to improve access to a broad spectrum of training opportunities in person, online, and in the field. The program's objective is to create a robust local network of training programs that increase capacity and knowledge related to energy efficiency in the building industry.

Workforce Development Program—IREN-WET-001

I-REN will convene and collaborate with state, regional, and local stakeholders, including workforce investment boards (WIBs) and economic development departments to develop a unified mission around the region's energy efficiency workforce, highlighting pathways for job seekers to enter the green jobs market and to increase access for disadvantaged communities. I-REN will facilitate identifying opportunities for employers and local workforce partners to network and connect. With its governing agencies' existing networks of contractors and training providers, I-REN is well positioned to help bridge the gap between the energy industry and the workforce.

I-REN also brings close connections with local government planning and building departments across the region. I-REN's proposed WE&T initiatives offer important opportunities for collaboration across other sectors through its work in the Public Sector and Codes & Standards (C&S) – both of which are important drivers of energy efficiency and advanced energy activity and employment in the region. I-REN will prioritize HTR, disadvantaged, underserved, and ESJ communities, and the organizations within those communities that support workforce development, and will help to raise the value of energy efficiency career paths within high schools, community colleges, and universities.

7. Coordination Protocol Between REN and IOU Programs

Coordination with the other Joint PAs 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, the Joint PAs have regular coordination calls, on a regular quarterly cadence, so that strategies and tactics can be cross-leveraged and support the core activities the Joint PAs have to

offer. This quarterly 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.

As a new PA, I-REN has not yet contracted with implementers. Within 60 days of implementer(s) being contracted for the relevant programs, the Joint PAs will reconvene to plan coordination activities specific to I-REN.

8. Coordination Between SW Program(s)

With PG&E as the statewide administrator for the Career and Workforce Readiness (CWR) and Career Connections WE&T subprograms, the IOUs 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 2023. 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.

9. 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 24: SoCalREN’s 2023 WE&T Program Compliance with D.12-11-015

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"> ✓ Provides local government agency RFP solicitation training for SWMDVBE contractors enabling these small underserved enterprises to participate in government funded EE and sustainability projects.
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	<ul style="list-style-type: none"> ✓ Provide training for certifications and credentials in energy-related industries for in-school youth and at-risk youth (homeless, transitioning foster youth)

3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap

- ✓ An organized, comprehensive regional workforce education and training partnership and resource network solely for disadvantaged workers and contractors at all skill levels.
- ✓ Entry-level workforce skills training infrastructure that solely emphasizes assisting youths and SWMDVBE.
- ✓ A DBE/WBE/DVBE contractor training program.

III. SOCIALREN 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:^{3, 4, 5}

- ✓ 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, 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. SOCIALREN UNDERTAKING ACTIVITIES THAT UTILITIES CANNOT OR DO NOT INTEND TO UNDERTAKE.

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.

³ D.12-11-015, p. 17.

⁴ D.19-12-021, p. 32.

⁵ D.16-08-019, pp. 11-12.

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 25 describes in detail many, but not all, the activities and strategies to be implemented in 2023 that “fill the gap” and define SoCalREN’s unique value.

Table 25: SoCalREN’s Activities That Fill Gaps and Strategies

SOCALREN PROGRAM	GAP	STRATEGY
EE PD Program	<ul style="list-style-type: none"> ✓ Local government partnerships diminished or eliminated ✓ No full scale one stop shop services for the entire project delivery path for all public agencies (including project management and procurement assistance) 	<ul style="list-style-type: none"> ➤ Regional Partnerships ➤ Full scale project services offered from project inception to project close out – at no cost to public agencies; Details provided in EE PDP section
DER DAC PD Program	<ul style="list-style-type: none"> ✓ Comprehensive DER audits not available through EE portfolio 	<ul style="list-style-type: none"> ➤ Full Scale project services offered which include DER audits and DER technical services
Public Agency RLF	<ul style="list-style-type: none"> ✓ No short-term construction financing offered for public agencies 	<ul style="list-style-type: none"> ➤ Short term 0% interest loan for public agency EE projects
Multifamily Program	<ul style="list-style-type: none"> ✓ Currently no regional electric Multifamily whole building retrofits offering 	<ul style="list-style-type: none"> ➤ Whole building electric and gas measure retrofits offered
WE&T Program	<ul style="list-style-type: none"> ✓ No local workforce offering for homeless and DAWs ✓ No training offered to assist WMDVBE’s participate in public agency EE project RFPs 	<ul style="list-style-type: none"> ➤ Workforce offering that provides certified pathways for homeless and DAWs ➤ Full-service training offered to assist WMDVBE’s in public agency EE project RFPs

SOCALREN PROGRAM	GAP	STRATEGY
Streamlined Savings Pathway	<ul style="list-style-type: none"> ✓ Program addresses gaps left by IOU program closures and third party program limitations; SoCalREN will launch the Streamlined savings pathway in Q1 of 2023 and adjust as needed to not duplicate offerings as new third party programs are introduced to the market. ✓ This program offers Public Agencies no loss in available services 	<ul style="list-style-type: none"> ➤ Provide a streamlined incentives pathway for public agencies projects ➤ Focus on projects serving or in rural, DAC and low-income communities
Kits for Kids	<ul style="list-style-type: none"> ✓ Currently no online interactive gaming platform that teaches 3rd and 4th grade students ✓ EE incentives for classrooms that support, promote EE installations. 	<ul style="list-style-type: none"> ➤ Online interactive gaming platform that educates elementary school children and their families while offering them no cost energy savings measures

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 PILOT 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 2023 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].
- ✓ DER DAC Program – comprehensive program that offers technical assistance that include 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.

These approaches currently are different from or not offered by the IOUs in SoCalREN’s overlapping service territory but do have the potential to be scaled and replicated if proven successful. SoCalREN’s 2023 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.

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

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.
Multifamily Program [SCR-RES-A1]	SCE Willdan Multifamily Energy Efficiency Program (MFEEP) Program [SCE_3P_2020RCI_004] SoCalGas Multifamily Upgrade [SCG3705]	XX		XX
Kits for Kids [SCR-RES-A3]		XX		XX
Energy Efficiency Project Delivery Program [SCR-PUBL-B1]	SCE - CLEAResult Public Energy Performance SoCalGas Government ⁶	XX		

⁶ 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.
DER DAC Project Delivery	Not Applicable	XX	XX	XX
Public Agency NMEC Program [SCR-PUBL-B3]	SCE - CLEAR Result Public Energy Performance SoCalGas High Opportunity Projects and Programs - Metered and Performance-Based Retrofits (MPBR) Program	XX	XX	XX
Public Agency Streamlined Savings Pathway [SCR-PUBL-B4]			XX	
Public Agency Revolving Loan Fund [SCR-FIN-C1]	SCE On Bill Financing Program [SCE-13-SW-007A] SoCalGas New Financing Offerings – GoGreen Home [SCG3737]	XX	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.
Residential Loan Loss Reserve [SCR-FIN-C2]	SCE New Financing Offerings [SCE-13-SW-007C] SoCalGas New Financing Offerings – GoGreen Home [SCG3737]		XX	XX
Workforce Education & Training [SCR-WET-D1]	SCE WE&T Integrated Energy Education & Training Program [SCE-13-SW-010A] SoCalGas' WE&T Integrated Energy Education Training Program [SCG3729]	XX	XX	XX

APPENDIX B: SOCALREN SUMMARY OF PROGRAMS OFFERED FOR 2023

Table B-1. SoCalREN Summary of Programs, 2023

REN Program Unique ID	Sector	Annual Budget	Eligible Measures
Multifamily Program [SCR-RES-A1]	Residential	\$8,217,671	Resource program.
Kits for Kids [SCR-RES-A4]	Residential	\$1,128,300	Not applicable. Non-resource program
Energy Efficiency Project Delivery Program [SCR-PUBL-B1]	Public	\$6,489,000	Not applicable. Non-resource program
DER DAC Project Delivery Program [SCR-PUBL-B2]	Public	\$3,813,000	Not applicable. Non-resource program
Public Agency NMEC Program [SCR-PUBL-B3]	Public	\$1,300,000	CMPA process; whole building measures
Public Agency Streamlined Savings Pathway [SCR-PUBL-B4]	Public	\$1,400,000	Resource Program
Public Agency Revolving Loan Fund [SCR-FIN-C1]	Cross-cutting: Financing	\$500,000	Not applicable. Non-resource program
Workforce Education & Training [SCR-WET-D1]	Cross-cutting: WE&T	\$800,000	Not applicable. Non-resource program

APPENDIX C: SCE, SOCALGAS, 3C-REN, AND I-REN SUMMARY OF COMPARABLE PROGRAMS

Table C-1. SCE Summary of Comparable 2023 programs

IOU Program Unique ID	Sector	Annual Budget	Eligible Measures
Willdan Multifamily Third- Party Energy Efficiency Program (MFEEP) [SCE_3P_2020RCI_004]	Residential	\$19,595,052	The program offers deemed, customized calculated, and NMEC-based site-specific approach measures for energy- saving equipment for both common and in-unit areas of multifamily properties; end uses include HVAC and Lighting, and Water Heating, Pool pump, High efficiency kitchen appliances, Showerheads and Faucets and Energy Management Technologies..
Statewide Finance Program – On-Bill Financing [SCE-13-SW-007A]	Cross-cutting: Financing	\$781,554 (implementation budget) \$14,000,000 (total loanpool)	Not applicable.
SCE – CLEAResult Public Energy Performance	Public	\$6,590,401	Custom, Deemed, NMEC and SEM
WE&T Integrated Energy Education & Training Program [SCE-13-SW-010A]	Cross-cutting: WE&T	\$ 8,840,814	N/A

Table C-2. SoCalGas Summary of Comparable 2023 Programs

IOU Program Unique ID	Sector	Annual Budget	Eligible Measures
Home Upgrade Program - Multifamily Home Upgrade Program [SCG3705]	Residential	\$2,361,124	Resource program
Residential Direct Install Program [SCG3883]	Residential	\$3,150,353	Resource program
Statewide – On-Bill Financing [SCG3735]	Cross-cutting: Financing	\$5,500,000 loan pool	Resource
New Financing Offerings [SCG3737]	Cross-cutting: Financing	\$43,919,485 in credit enhancements available statewide	Resource
Regional Energy Pathways [SCG3912]	Public	\$2,051,023	Resource
WE&T IEET [SCG3729]	Cross-cutting: WE&T	\$4,350,000	Not applicable. SW Non-resource program

Table C-3. 3C-REN Summary of Comparable 2023 Programs

IOU Program Unique ID	Sector	Annual Budget	Eligible Measures
3C-REN WE&T [TCR-WET-001]	Cross-cutting: WE&T	\$1,190,021	N/A
3C-REN Multifamily [TCR-Res-002]	Residential	\$3,430,037	Site-specific measures that achieve energy savings both in-unit and in common areas.

Table C-4. IREN Summary of Comparable 2023 Programs

REN Program Unique ID	Sector	Annual Budget	Eligible Measures
Technical Assistance and Strategic Energy Planning Program [IREN-PUBL-001]	Public	\$2,908,219	Not applicable; non-resource program
Public Buildings NMEC Program [IREN-PUBL-002]	Public	\$3,283,503	Any energy saving measure
WE&T Training and Education Program [IREN-WET-001]	Cross-cutting: Workforce Education & Training	\$1,032,169	Not applicable; non-resource program
WE&T Workforce Development Program [IREN-WET-001]	Cross-cutting: Workforce Education & Training	\$1,361,257	Not applicable; 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 2022

To be updated as needed upon completion of utility local public sector solicitations. Document is for current program offerings.

SoCalREN and IOUs will coordinate their respective programs including IOU's core and Third Party Programs (3PP) and resources to minimize duplicative offerings and work in an approach where the SoCalREN complements and supplements the IOU and IOU's 3PPs, 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 plethora of programs and offerings by Program Administrators allowing the customer to be the decision-maker. This approach is in the best interest of the customer by providing complementary tools that help bridge gaps in meeting their agency's 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 Disadvantaged Communities Project Delivery Program, publicly known as the Pathway to Zero Program
- Revolving Loan Fund, publicly known as the Revolving Savings Fund

Additionally, this document outlines coordination protocols for the delivery of SoCalREN's Public Agency resource acquisition programs, including:

- Public Agency NMEC Program, publicly known as Metered Savings Program
- Streamlined Savings Pathway

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 energy efficiency 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 program leads and representatives, SoCalGas program representatives (Public Sector Regional Program Managers, IOU/REN coordination leads, Account Executives, etc.), and 3PP implementers are intended to successfully drive energy efficiency project delivery and foster public agency satisfaction. Key coordination strategies include the following:

- IOUs will provide regular and timely information and updates to SoCalREN program representatives on core and 3PP available to public agencies.

- SoCalREN will provide regular and timely information and updates to IOU program representatives on SoCalREN Public Agency Programs.
- Any requests for presentations for IOU's core and 3PP should be coordinated through the respective IOU's and/or 3PP lead PM for IOU/REN coordination.

Customer Data & Information

- SoCalREN's preference is to obtain customer information directly from the customer. If requesting customer information directly from the IOUs, SoCalREN must provide the IOU written customer authorization (i.e. signed CISR form or Executed Authorization Form) to obtain additional customer information related to energy efficiency project delivery, as needed for SoCalREN enrolled participants.
- Upon request, IOUs will provide customer authorized project-level data to SoCalREN monthly upon request through the IOU/REN Data Transfer template for projects going through IOU programs and third-party programs.
 - SoCalREN will acquire written documentation of the customer's authorization (i.e., signed CISR Form or Executed Authorization Form) to obtain project-level data or information from an IOU. This documented authorization will be provided by SoCalREN to the appropriate IOU's lead PM for IOU/REN coordination.

Customer Engagement & SoCalREN Enrollment Activities

- If an IOU representative receives an inquiry about SoCalREN program services, the IOU representative will contact SoCalREN representatives and determine how best to set the follow-up meeting with the agency.
- Once the agency is enrolled, SoCalREN will provide quarterly updates to inform the IOU representatives on key project-related SoCalREN activities when the agencies are pursuing IOU core, 3PPs, and SoCalREN programs and keep IOUs informed of activities with those agencies.
 - Ad hoc email updates will be provided by SoCalREN to the IOUs as needed to communicate critical project development updates. These critical updates include the Initial Measures List presentation and incentive application submission updates.
- Once the agency is enrolled, IOU representatives will inform SoCalREN about any key SoCalREN project-related interactions with the agency in which SoCalREN representatives are not present, and keep SoCalREN informed of such activities with agencies.
- SoCalREN will timely inform appropriate SCE Account Managers and SoCalGas program representatives (Public Sector Regional Program Managers, IOU/REN coordination leads, Account Executives, etc.), of any engagement meeting prior to enrollment in EE Project Delivery services, and send an email survey to learn more about the customer's needs and opportunities. Notification of the enrollment meeting should happen typically two weeks prior to a meeting. In some cases, and based on customer needs, meetings may be scheduled with less than two weeks' notice. SoCalREN will make best efforts for advanced notice of enrollment meetings and accommodate utility representative schedules, as feasible, depending on the availability of the agency.
- Agency's past and present participation in utility programs will be addressed through an electronic survey sent to the IOUs to calibrate expectations of energy savings potential and ensure there is no double-dipping. IOUs will have one week to respond to the survey ahead of the enrollment meeting.
 - In the event that the email survey is not sufficient to address customer details, a pre-coordination meeting may be requested within 1 week of survey receipt and held on a case-by-case basis if deemed necessary by all parties.
- IOU attendance at engagement meetings is optional; however, reasonable efforts to arrange for

participation by interested IOU leads will be made by SoCalREN. SoCalREN will notify appropriate IOU partners of the meeting, and they may request to participate.

- No more than two (2) representatives from each IOU may participate at the engagement meeting (unless additional representatives' participation is identified and discussed prior to the meeting). IOU representatives will confirm ahead of the meeting which participants will attend.
- SoCalREN may elect to conduct the customer meeting 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.
 - Enrollment meetings may include multiple eligible agencies to streamline coordination activities.
 - If the meeting is a remote webinar, the meeting should use an application that is accessible to the IOUs.
- 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.

Project Specific Activities

- Efforts will be made to present applicable utility core and 3PPs to customers by SoCalREN representatives when evaluating projects. SoCalREN will connect agencies with appropriate utility or 3PP representatives when interest is expressed, and utility leads will connect interested parties to SoCalREN representatives when interest in SoCalREN is expressed.
- SoCalREN will include the SCE Lead PM and SoCalGas Lead PM on communications to other IOU representatives related to SoCalREN activity as needed for successful project delivery. Conversely, IOU representatives will include SoCalREN PMs and SCE Lead PM and/or SoCalGas Lead PM on agency-directed communications where SoCalREN is supporting project development and implementation.
- SoCalREN will follow established processes for submitting incentive/rebate applications as the Trade Professional for core (SCG only) or 3PPs when the customer has asked SoCalREN to file the incentive/rebate applications on their behalf. SoCalREN will work with the appropriate IOU representative and/or 3PP implementer for timely completion of items such as a Project Feasibility Study and collecting influence documentation to ensure a complete application for submittal.
- SoCalREN will request SoCalGas review of measure specifications and equipment qualifications ahead of submitting rebate and incentive applications through SoCalGas core programs.
- For projects pursuing SoCalGas core programs, SoCalREN will provide a courtesy copy of incentive applications to Account Executives at the time of submittal where SoCalREN is acting as the Trade Professional.
- SoCalREN will hold monthly project coordination meetings with each utility to discuss active projects participating in utility core (SoCalGas only) or 3PP programs.

How will SoCalREN and SoCalGas Public Sector coordinate services and activities? SoCalGas continues to service all public sector customers through its Public Sector Energy Pathways. SoCalGas Public Sector program leads will continue to engage in IOU/REN coordination in 2022 and beyond.

SoCalREN and SoCalGas' program representatives (Public Sector Regional Program Managers, IOU/REN coordination leads, Account Executives, etc.) will prioritize collaboration and reciprocal communication with regards to energy efficiency project delivery services for public agencies as well as

engagement prior to enrollment in SoCalREN programs. Key coordination strategies include the following:

- When engaging agencies within a SoCalREN Regional Partnership territory, SoCalGas will be extended the opportunity to educate agencies on the Public Sector Program availability during appropriate meetings. SoCalREN & SoCalGas will align on the presentation facilitation and content ahead of such meetings.
- SoCalREN will include in the pre-enrollment survey a question to SoCalGas representatives (Public Sector Regional Program Manager and/or Account Executive) about technical assistance offerings to determine how to best collaborate on a strategy that helps meet the customer's needs, leveraging all feasible resources. Pre-coordination calls can be scheduled on an as-needed basis.
- Agency contacts, roles, and responsibilities will be confirmed, and communication strategies discussed during enrollment meetings.
- SoCalGas roles and responsibilities, including primary contact designation for agencies will be confirmed during enrollment meetings.
- If SCG's program representatives (Public Sector Regional Program Managers, IOU/REN coordination leads, Account Executives, etc.), receive an inquiry about SoCalREN program services, SCG's program representatives (Public Sector Regional Program Managers, IOU/REN coordination leads, Account Executives, etc.), will contact SoCalREN representatives and determine how best to set the follow-up meeting with the agency.
- Once the agency is enrolled, SoCalGas program representatives will inform SoCalREN Representatives on any key SoCalREN project-related interactions with the agency in which SoCalREN representatives are not present and keep SoCalREN informed of such activities with agencies.

How will SoCalREN and SCE/SoCalGas/3PPs 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 3P or other utility Program Leads for coordination purposes will be initiated as follows:

- For SCE 3P programs, SoCalREN will coordinate directly with the 3P implementer and inform SCE lead of such coordination meetings.
- For SCG-led 3P programs, SoCalREN will coordinate directly with SoCalGas first. SoCalGas will lead the coordination effort.
- SoCalREN will need to initiate a coordination meeting with SCG before engaging with existing and new 3P implementers.
- As projects are developed, SoCalREN and SCG will identify which 3PP will be applicable to the measures and sites audited and coordinate with the 3PP implementers as needed for project handoff or coordinated project development.

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

SoCalREN shall work with DER Program leads at SoCalGas and SCE on a quarterly basis to ensure that all SoCalREN 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 an annual check-in. Additionally, when presenting the Pathway to Zero program's Pathway to Zero Report to a local public agency, the SoCalREN PM will include relevant IOU program resources and information that has been identified to be of interest to that public agency.

How will SoCalREN and SCE/SoCalGas Coordinate services for public agency projects pursuing a

SoCalREN incentive program (Streamlined Savings Pathway or Metered Savings Program)?

- SoCalREN and IOU representatives will convene early in the project development process to discuss what gaps in the IOU core program and 3PP offerings are being addressed by the SoCalREN program during the Initial Measures List review.
- If the agency elects to pursue a SoCalREN incentive program, SoCalREN will not include IOU representatives in further project correspondences outside of the quarterly updates unless required for data collection or other project delivery needs.

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 Account Managers and other Program leads learn about SoCalREN?

The IOUs will have lead responsibility for informing their program representatives (Public Sector Regional Program Managers, IOU/REN coordination leads, Account Executives, etc.), about the coordination strategy with SoCalREN.

Opportunities to learn about the program include:

- IOU representatives may visit socalren.org at any time to learn more about the public agency programs. A list of all enrolled agencies can be found on the Public Agencies - Program Information tab of the website.
- Attendance at a Joint IOU / SoCalREN Overview Workshop, which may be offered at various locations throughout the IOU territory or virtually in coordination with the IOUs.
- SCG program representatives (Public Sector Regional Program Managers, IOU/REN coordination leads, Account Executives, etc.), may request to coordinate with SoCalREN to jointly host meetings with public agencies to present SoCalREN's services.
- 3PP Managers may also choose to coordinate with SoCalREN to jointly host meetings with public agencies to present SoCalREN's services. For SCG 3P programs, SoCalREN will coordinate with the SCG 3PP Program Manager ahead of coordination with the 3PP.
- Additional opportunities for SoCalREN presentations will be offered on request.

How will SCE address public sector project delays due to prolonged project application review and approval timelines?

SCE and SoCalREN will work together to reduce project delays for the existing pipeline of projects prior to 3PP implementation. This will be accomplished by:

- Bi-weekly check-in meetings with the Commercial Custom Program Manager to review the status of all project applications.
- SCE will adhere to the below timelines for existing pipeline project Application Reviews:
 - SCE will notify SoCalREN staff of required missing documents/information in the applications within 10 business days
 - SCE will aim for technical review, prior to upload to CMPA, to take no more than 30 business days per the Statewide California Program Administrator Custom Project Review Process Timeline Guide
 - SCE will issue NRDs through the established formal process and will not issue informal requests after technical review has been completed

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

SoCalREN, SCE, SoCalGas NMEC Participation Coordination for Public Agencies

Last Updated: May 2022

To be updated upon completion of utility local public sector solicitations. Document is for current program offerings.

SoCalREN, IOUs and IOU third party program implementers (3PP) will coordinate their respective program offerings and resources to minimize duplicative offerings and work in an approach where the SoCalREN complements and supplements the programs with the understanding this is a reciprocal relationship. SoCalREN, IOUs, and 3PP implementers should work toward a goal that minimizes duplication of programs consistent with the approved annual Joint Coordination Memo (JCM), increases efficient promotion of existing programs and allows all public agencies a choice amongst all offerings of Program Administrators 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 agency's goals.

Coordination laid out in this document is for public agency participation in Normalized Metered Energy Consumption (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 (PBRP)
- SCG High Opportunity Program and Projects (HOPPs), also known as the Metered and Performance-Based Retrofits Program (MPBR)
- SoCalREN Public Agency NMEC program, also known as the Metered Savings Program.

As the SoCalREN Public Agency NMEC Program and IOU NMEC and 3PP 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, SCG Account Executives, and IOU 3PPs 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 and/or 3PP 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, 2019. The queue is defined as receiving predictability analysis⁷ through the respective program.
 - Any projects that are not in the HOPPs queue by June 1, 2019 will follow the established process established to jointly present IOU and SoCalREN NMEC programs to the agency using documentation such as the Project Proposal slide deck.
- 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 NMEC program conversations with SoCalREN enrolled public agencies, SoCalREN will be invited to provide their service offerings. In addition, prior to SoCalREN presenting the NMEC program options to an agency for a project, applicable IOUs will receive the draft presentation slides to be presented to the agency. IOUs will have 7 business days to provide feedback, ask questions, or request a pre-coordination call if required. If SoCalREN does not receive a response within those 7 business days, they will move forward with the slides for the scheduled meeting with the agency.

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 for electric savings 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 or third party program? The SoCalREN Public Agency Energy Efficiency Project Delivery Program (EE PDP)

⁷ Analysis of pre-installation energy usage patterns of a facility or site to evaluate the feasibility for an NMEC program approach.

and the Distributed Energy Resources for Disadvantaged Communities Program (DER DAC) are non-resource programs that provide comprehensive support services to energy efficiency projects from identification to completion. The EE PDP and DER DAC programs will continue to support agencies with project identification and audit services, from which NMEC potential projects may be developed. NOTE: Future updates will be included as IOU 3PPs launch in the market. Following the delivery of the project proposal presentation (step 7 on the decision tree), the services will be available as follows to HOPPs projects:

- Projects in the queue prior to June 1, 2019 would continue to receive full EE PDP and DER DAC services through completion.
- Projects without IOU NMEC resources committed (baseline modeling completed) by June 1, 2019 to follow standard protocol
- New IOU NMEC projects identified past June 1, 2019 would no longer receive SoCalREN PDP and DER DAC services after the project proposal is presented and HOPPs pathway is selected by the customer.
- SoCalREN will develop the Form H, full audit calculations, influence narrative and timeline (not a full Project Feasibility Study [PFS]) for projects pursuing HOPPs as a deliverable during the IOU handoff.

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

Inquiries 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 (NOTE: Future updates will be included as IOU 3PPs launch in the market.)

