

SoCalREN

Energy Efficiency Rolling Portfolio Business Plan, 2018 - 2025

Public Stakeholder Workshop

February 2, 2017

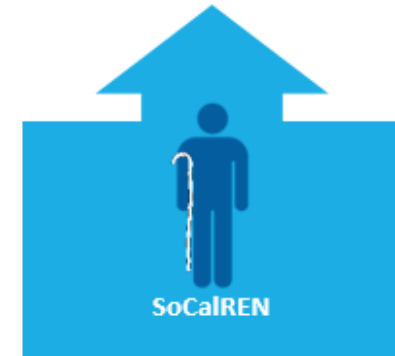


SoCalREN Energy Efficiency Rolling Portfolio Business Plan, 2018 -2025

Public agencies play a critically important role in achieving California's EE and ZNE goals and contributing to meeting the state's aggressive energy and climate goals. Unleashing the potential of the public sector to lead by example and motivate community action is key to charting the pathway to ZNE communities.

SoCalREN Framework:

- SoCalREN will provide public agencies with community-wide solutions that consider all sources and uses of energy within their boundaries.
- SoCalREN will provide a full range of technical assistance to the public sector driving adoption of ZNE communities through key intervention strategies and cross-cutting support.
- SoCalREN's offerings complement and supplement investor-owned utility (IOU) programs by filling gaps and finding synergies to maximize opportunities for customers and other market actors.



SoCalREN Portfolio Strategies and Goals

8-year Vision

To harness the collective action of public agencies to save energy and lead their communities on the pathway to a safe, secure, resilient, affordable and sustainable energy future.

Energy Efficiency Portfolio Goals

Goal 1

Increase public agency engagement and influence a greater proportion of customers

Goal 2

Integrate energy efficiency with other DER options and compliance enhancements to enable a pathway to ZNE future

Goal 3

Increase operational and behavioral efficiency

Program Intervention Strategies



Energy Efficiency Project Delivery



Engage & Educate Communities



Regional Energy Master Plans



Partnerships



Support C&S engagement



Financing



Technical Assistance



Integrate Access to Data



Integrate Residential PACE



SoCalREN Residential Sector

SoCalREN's vision for the residential sector is for all Southern California residents to live in homes that are ZNE or ZNE-ready.

Goals:

- Save 30 gigawatt hours (GWh), 16 MW, and 1,500,000 therms focusing on deep retrofit opportunities within multifamily and single family properties through innovative approaches in program design.
- Integrate Residential PACE and single family program designs to drive customers to do more comprehensive projects.
- Demonstrate public agency actions toward promoting energy efficiency, targeting a goal of more than doubling the number of agencies making energy efficiency commitments.
- Drive program participation through local outreach and engagement about energy efficiency and ZNE, more than tripling the number of engagements with high potential program participants.
- Provide low-income customers an opportunity to participate in energy efficiency programs by engaging public agencies to offer EE programs in coordination with existing income-qualified community development programs.
- Transform the Heating Ventilation and Air Conditioning (HVAC) industry to ensure optimal energy performance in California by training targeted contractors annually on energy efficiency, ZNE, and tools available to offer high performance, above-code HVAC upgrades to customers.

Modifications from Prior Cycle:

- Transition away from implementation of Home Upgrade and Integrate with Residential PACE to Drive Greater Energy Savings.
- SoCalREN will build in additional structure to capture metrics and report on collaborative efforts with public agencies thus increasing the engagement of public agencies to drive energy efficiency in their communities
- Prior program cycles focused on technical assistance for individual property owners and building professionals to enable their potential for discrete program participation. SoCalREN will shift focus to community-level technical assistance on efforts such as ZNE.



SoCalREN Public Sector

SoCalREN envisions a future in which public agencies and their constituents play an active leadership role in shaping ZNE communities that are safe, secure, resilient, affordable, and sustainable.

Goals:

- Save 120 gigawatt hours (GWh), 4 megawatts (MW), and 112,000 therms over an 8-year period.
- Enroll 40 percent of eligible public agencies in the Energy Network EE program.
- Increase the percentage of public agencies that engage their communities in energy actions and ZNE strategies, thereby reducing overall community energy consumption.
- Increase the ability of public agencies to meet local, regional, and state energy targets and policy goals through (1) creating a regional energy master plan and (2) creating a regional energy information database.
- Increase the percentage of agencies that adopt model codes, standards, and policies that support implementation of ZNE communities.



Modifications from Prior Cycle:

- SoCalREN's 2018–2025 business plan expands the public sector focus by adding new program offerings and enhance existing program offerings to build public agency capacity and expertise, driving a lead by example approach in their communities.
- Resources that previously supported the Water-Energy Nexus pilot, the Community Energy Efficiency Permit Management System (CEEPMS), the Public Agency Revolving Loan Fund, and the Public Agency Loan Loss Reserve have been reallocated to SoCalREN's Public Sector Business Plan intervention strategies



SoCalREN Budget and Cost Effectiveness, 2018-2025

Table 1: Portfolio Budget by Sector

Sector	2017	2018	2019	2020	2021	2022	2023	2024	2025
Residential	10,577,552	6,540,000	\$6,670,800	6,804,216	6,940,300	7,079,106	7,220,688	7,365,102	7,512,404
Public	8,294,198	11,336,000	\$11,562,720	11,793,974	12,029,854	12,270,451	12,515,860	12,766,177	13,021,501
Codes and standards	C&S budget included in Public budget	1,090,000	1,111,800	1,134,036	1,156,717	1,179,851	1,203,448	1,227,517	1,252,067
Financing	2,779,250	2,180,000	2,223,600	2,268,072	2,313,433	2,359,702	2,406,896	2,455,034	2,504,135
Workforce, Education & Training	WET budget included in Public budget	654,000	667,080	680,422	694,030	707,911	722,069	736,510	751,240
Total	\$21,651,000	\$21,800,000	\$22,236,000	\$22,680,720	\$23,134,334	\$23,597,021	\$24,068,962	\$24,550,341	\$25,041,348

Table 2: Portfolio Budget % by Sector Compared to Previous Cycles

Sector	2014-2016	2018 - 2025	Change +/-
Residential	50%	30%	-20%
Public	39%	52%	+13%
Codes and standards	0%	5%	+5%
WE&T	12%	10%	-2%

Table 3: Cost Effectiveness Portfolio Objective Range for Business Plan Term, 2018-2025

	TRC	PAC	Emissions (lbs of CO2)	kW	kWh	Therms
Resource Portfolio CE	1.01	1.23	5,103	7,446	24,773,113	892,809



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