California Public Utilities Commission

ADVICE LETTER SUMMARY

ENERGY UTILITY

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

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

Utility type:
☑ ELC ☑ GAS ☐ WATER
☐ PLC ☐ HEAT

Contact Person: Minh Le
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E-mail Disposition Notice to: MSLe@isd.lacounty.gov

EXPLANATION OF UTILITY TYPE
ELC = Electric GAS = Gas WATER = Water
PLC = Pipeline HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: 13-E/13-G

Tier Designation: 2

Subject of AL: COMPLIANCE FILING REGARDING SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK 2021 ENERGY EFFICIENCY PROGRAM PORTFOLIO CHANGES AND FUNDING REQUEST

Keywords (choose from CPUC listing): Energy Efficiency, Portfolio,

AL Type: ☐ Monthly ☐ Quarterly ☐ Annual ☐ One-Time ☐ Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #:
D.15-10-028, D.18.05-041, D.14-10-046

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL: no

Summarize differences between the AL and the prior withdrawn or rejected AL: n/a

Confidential treatment requested? ☐ Yes ☐ No

If yes, specification of confidential information:
Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:

Resolution required? ☐ Yes ☐ No

Requested effective date: 10/1/20

No. of tariff sheets: N/A

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

Estimated system average rate effect (%): N/A

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

Tariff schedules affected: N/A

Service affected and changes proposed[1]: N/A

Pending advice letters that revise the same tariff sheets: N/A

[1]Discuss in AL if more space is needed.

Clear Form

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

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Title:
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State: District of Columbia Zip:
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Clear Form

ENERGY Advice Letter Keywords

Affiliate	Direct Access	Preliminary Statement
Agreements	Disconnect Service	Procurement
Agriculture	ECAC / Energy Cost Adjustment	Qualifying Facility
Avoided Cost	EOR / Enhanced Oil Recovery	Rebates
Balancing Account	Energy Charge	Refunds
Baseline	Energy Efficiency	Reliability
Bilingual	Establish Service	Re-MAT/Bio-MAT
Billings	Expand Service Area	Revenue Allocation
Bioenergy	Forms	Rule 21
Brokerage Fees	Franchise Fee / User Tax	Rules
CARE	G.O. 131-D	Section 851
CPUC Reimbursement Fee	GRC / General Rate Case	Self Generation
Capacity	Hazardous Waste	Service Area Map
Cogeneration	Increase Rates	Service Outage
Compliance	Interruptible Service	Solar
Conditions of Service	Interutility Transportation	Standby Service
Connection	LIEE / Low-Income Energy Efficiency	Storage
Conservation	LIRA / Low-Income Ratepayer Assistance	Street Lights
Consolidate Tariffs	Late Payment Charge	Surcharges
Contracts	Line Extensions	Tariffs
Core	Memorandum Account	Taxes
Credit	Metered Energy Efficiency	Text Changes
Curtailable Service	Metering	Transformer
Customer Charge	Mobile Home Parks	Transition Cost
Customer Owned Generation	Name Change	Transmission Lines
Decrease Rates	Non-Core	Transportation Electrification
Demand Charge	Non-firm Service Contracts	Transportation Rates
Demand Side Fund	Nuclear	Undergrounding
Demand Side Management	Oil Pipelines	Voltage Discount
Demand Side Response	PBR / Performance Based Ratemaking	Wind Power
Deposits	Portfolio	Withdrawal of Service
Depreciation	Power Lines	

Clear Form

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"To enrich lives through effective and caring service"

September 1, 2020

Advice Letter 13-E/13-G
(CPUC Identification #940)

Public Utilities Commission of the State of California

SUBJECT: COMPLIANCE FILING REGARDING SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK 2021 ENERGY EFFICIENCY PROGRAM PORTFOLIO CHANGES AND FUNDING REQUEST

I. PURPOSE

The Southern California Regional Energy Network (SoCalREN) submits its 2021 Energy Efficiency (EE) portfolio budget by Tier 2 Advice Letter (AL) to the California Public Utilities Commission (Commission), in compliance with *Decision Re Energy Efficiency Goals for 2016 and Beyond and Energy Efficiency Rolling Portfolio Mechanics*, the "Rolling Portfolio decision," (D.15-10-028) and the Decision Addressing Energy Efficiency Business Plans (D.18-05-041) and guidance from the Commission Energy Division (ED) Staff. This Advice Letter provides budget, programmatic adjustments and updated supporting documentation for energy efficiency programs the SoCalREN will offer in 2021.

SoCalREN requests that the Commission approve its 2021 EE Budget, effective as of January 1, 2021. SoCalREN also requests the approval of its updated common metric targets as detailed below.

II. KEY UPDATES

A. Impact of COVID-19 on the 2021 Portfolio

The unprecedented impacts of COVID-19 and California's shelter-in-place order affected SoCalREN and its third-party implementers' ability to operate EE programs in 2020. On March 13, 2020, SoCalREN paused all on-site customer contacts within its energy efficiency programs, in support of the California stay-at-home order. As a result, during the months of March, and April 2020, many of SoCalREN programs were negatively impacted due to the initial California shelter-

in-place order. On May 18, 2020, SoCalREN lifted these suspensions and has not sent new suspension notices for any programs. SoCalREN and its business partners began implementing mitigation measures during this time, such as remote audits and virtual workshops and customer enrollments.

It is difficult to estimate the COVID-19 impacts on the final 2020 results and to separate participation impacts of COVID from other recent trends in energy efficiency. SoCalREN's projected volumes across its portfolio of programs is likely to be down 50 percent from 2019 due to COVID-19 impacts. However, SoCalREN continues to monitor COVID-19 and its impact on the state's energy efficiency portfolio and will continue to implement mitigation strategies in an effort to continue momentum and accomplishments achieved in 2019.

As discussed in this ABAL, SoCalREN's 2021 portfolio reflects a few new programs within the portfolio, while maintaining most of its existing portfolio for program year 2021. SoCalREN's 2021 forecasts of budget and savings estimates reflect the best available information. SoCalREN anticipates that it will continue to utilize virtual methods, where applicable and necessary, to support the success of the 2021 programs and beyond. SoCalREN will continue to manage its 2020 and 2021 EE portfolios to reflect market realities of COVID-19 and any other factors.

III. BACKGROUND

A. Commission Directed Filing Requirements

D.15-10-028 requires each EE Program Administrator (PA) to file a Tier 2 advice letter with the PA's annual EE budget for the coming year in September of each year and requires such advice letters to contain:

- Portfolio cost-effectiveness statement; and
- Application summary tables with forecast budgets and savings by sector and program/intervention.

In addition, D.18-05-041 provided further guidance to PAs in submitting Annual Budget Advice Letters (ABAL). D.18-05-041 requires that the Regional Energy Networks (REN) Annual Budget Advice Letters (ABAL) include the following:

- Forecasted energy savings goals must meet or exceed the annual energy savings targets included in the PA's business plan; and
- Forecasted budget must not exceed the PA's annual budget in the approved business plans, or (if applicable) the revised annual budget in this ABAL. [1]

Furthermore, beginning in 2019, D.18-05-041 directs all PAs to include the following:

[1] D.18-05-041, p. 134

> "Beginning with the annual budget advice letters due on September 3, 2019, the program administrators must include updated budget estimates in the same format as the supplemental budget information filed in this proceeding on June 12, 2017."[2]

This supplemental budget information is included in Attachment C of this advice letter.

B. Energy Division Staff ABAL Requirements

Additionally, the Commission directed Commission Staff to develop templates and further guidance as needed for ABAL submissions. On July 19, 2018, the Commission's Energy Division (Energy Division) issued its guidance for the PAs' ABAL submissions. The Energy Division instructed the PAs to include the following additional information in their ABALs:

- PA's Program Year Budget and Forecasted Savings; and
- A Narrative of Program and Portfolio Information, including:
  - Proposed program changes;
  - Proposed portfolio changes; and
  - Additional explanations if the IOU PA's TRC is between 1.0 and 1.25 or if the forecasted energy savings is below Commission established goals.

On June 30, 2020, the Energy Division asked the PAs to include a table that clearly defines the budget uploaded to CEDARS and to identify the difference between the budget and the revenue requirement. Although REN PA's do not have revenue requirements, SoCalREN has included a table outlining what has been uploaded to CEDARs and the offset due to uncommitted/unspent from prior program years which will reduce the amount collected from ratepayers for program year (PY) 2021. This information is presented in Table 3.

C. Contents of this Filing

SoCalREN's advice letter is organized as follows:

- Budget
- Cost Effectiveness
- Energy Savings
- Proposed Program and Portfolio Changes
  - Proposal for a new residential program.
  - Covid-19 Strategies
- SoCalREN Unique Value Metrics
- CPUC Common Metrics

In addition to the information above, SoCalREN's 2021 EE budget AL includes the following materials:

- Attachments
  - Attachment A – SoCalREN 2021 ABAL Tables
  - Attachment B – CEDARS Filing Confirmation
  - Attachment C – Per D.18-05-041, Supplemental Budget Information
  - Attachment D – Residential Program Proposal: Kits 4 Kids

[2] D.18-05-041, Ordering Paragraph (OP) #44 p. 192

- Attachment E – Advice Letter 12-E/G Attachment A: SoCalREN's HSREEP Program Proposal file don July 7, 2020
- Attachment F – SoCalREN Unique Value Metrics
- Attachment G – CPUC Common Sector Level Metrics: Updated Targets
- Attachment H – SoCalREN Program Level Explanation of Modifications

IV. 2021 EE PORTFOLIO SUMMARY

As part of SoCalREN's ABAL planning and development process, SoCalREN developed an optimized and cost-efficient portfolio that aims to drive deeper energy savings despite current market challenges. The SoCalREN's PY 2021 portfolio includes meeting the Commission's desire for REN's to increase their overall cost-effectiveness, achieve deeper energy savings goals, adhere to budget caps and targets. In addition, SoCalREN's portfolio continues to support the Commission's objectives for REN's to serve hard-to-reach market segments and to fill gaps with the current EE market.[3]

To continue optimizing its portfolio for its goals and cost-effectiveness requirements, SoCalREN proposes the following adjustments to its 2021 EE portfolio:

- Optimizing all measures and programs to maximize savings and cost- effectiveness;
- Reducing programs that contain strategies that are no longer viable in the current post-Covid-19 EE market and introduce new programs strategies expected to launch in 2021;
- Continuing to reduce portfolio costs in support of third-party proposed, designed, and delivered programs.

The result of SoCalREN's optimization efforts — the proposed portfolio budget, savings, and cost-effectiveness, based upon currently approved energy savings and cost-effectiveness inputs to its measure and program mix — are contained in Sections V, VI and VII.

V. 2021 EE PORTFOLIO BUDGET

SoCalREN requests a total portfolio and evaluation, measurement and verification (EM&V) budget of $21,626,000. This budget reflects a total authorized program year cap as adopted in D.18-05-041 and includes shifts between and within sectors, to accommodate new offerings. These portfolio modifications are oriented toward addressing the COVID-19 crisis. For 2021 and beyond, SoCalREN has taken a range of actions to mitigate the impact of COVID-19, including fostering

[3]

Regional Partnerships with a variety of groups (e.g. Councils of Government, Clean Energy Organizations, etc.) to develop innovative pilot programs that can address specific gaps in their localities, and to help support the needs of hard-to-reach markets and disadvantaged communities who were already struggling pre-COVID-19. We intend to provide alternative delivery solutions through the launch of preliminary programs that can be delivered remotely with the potential to scale. SoCalREN's proposed portfolio is forecasted to meet a TRC of 0.37 for 2021.

Table 1 provides an overview of SoCalREN's 2021 forecasted portfolio budget, savings, and cost-effectiveness. The net savings forecast excludes market effects.

TABLE 1. SoCalREN Budget and Savings Summary

		SoCalREN FORECAST ENERGY SAVINGS (Net)		
Sector	**Program Year Budget**	Forecast kWh	Forecast kW	Forecast therms (MM)
Residential	$7,900,000	5,561,381	313	503,387
Commercial	$500,000	59,986	6	-
Industrial	$0	na	na	na
Agriculture	$0	na	na	na
Emerging Tech	$0	na	na	na
Public	$10,979,000	2,520,000	559	711
Codes and Standards	$0	na	na	na
WE&T	$700,000	na	na	na
Finance	$1,300,000	na	na	na
OBF Loan Pool	$0	na	na	na
Subtotal	$21,379,000	8,141,367	878	504,098
SoCalREN PY 2019 ABAL 2021 Savings Goal Adopted Submission[1]		*5,652,735*	*759*	*159,783*
Forecast Savings as a % of PY 2019 ABAL Adopted Submission		***144%***	***116%***	***315%***
SoCalREN EM&V[2]	$244,495			
Total SoCalEN PY Spending Budget[3]	$21,623,495			
Uncommitted and Unspent Carryover balance *(PY 2013-2019)*[4]	$8,586,944			
Total SoCalREN PY Budget Recovery Request[5]	$13,036,551			
Authorized PY Budget Cap (D.18-05-041)	$21,626,987			

Forecast PY TRC	0.37
Forecast PY PAC	0.56

SoCalREN Unspent Committed funds (from all prior PY through December 31, 2020)	$0

Table 1. Footnotes:

1 Per D. 19-08-034, p. 28.

[2] Per D.16-08-019, the SoCalREN 2020 EM&V budget is based on the proportion of IOU allocated EM&V funds.

[3] Total proposed program year budget spending, including uncommitted unspent carryover

[4] The balance included this filing reflects the IOU Partner - SoCalREN Reconciliation Exercise of uncommitted/un spent funds from program years 2013-2019. Due to the uncertainty regarding 2020, both the IOU Partners (SCE and SoCalGas) and SoCalREN agreed it is too early to identify at this time. However, the value of unspent/uncommitted funds for years 2013-2019 will help true up the collected ratepayer balance thus allowing the IOU partners the need for a small budget recovery request for 2021 and relieving ratepayer collection.

[5] Amount of funds to be collected for the Program Year - Line 18 less Line 19

Table 2 provides an overview of SoCalREN's forecasted annual portfolio and EM&V budgets, as well as cost-effectiveness until 2025.

TABLE 2. SoCalREN Annual Rolling Portfolio Budget Forecast- True Up

	Annual Rolling Portfolio Budget Forecast - True-up								
Sector	2018**	2019	2020	2021	2022	2023	2024	2025	**Total**
Residential	$6,540,000	$6,721,000	$7,578,000	$7,900,000	$8,110,000	$8,150,436	$8,200,000	$8,250,000	$61,449,436
Commercial	$0	$0	$0	$500,000	$0	$0	$0	$0	$500,000
Industrial	$0	$0	$0	$0	$0	$0	$0	$0	$0
Agriculture	$0	$0	$0	$0	$0	$0	$0	$0	$0
Emerging Tech	$0	$0	$0	$0	$0	$0	$0	$0	$0
Public	$9,815,000	$11,500,000	$11,750,000	$10,979,000	$11,640,000	$12,043,000	$12,446,000	$12,894,000	$93,067,000
Codes and Standards	$0	$0	$0	$0	$0	$0	$0	$0	$0
WE&T	$258,000	$284,000	$350,000	$700,000	$400,000	$400,000	$450,000	$500,000	$3,342,000
Finance	$2,180,000	$2,237,000	$1,500,000	$1,300,000	$1,600,000	$1,620,000	$1,650,000	$1,650,000	$13,737,000
OBF Loan Pool	$0	$0	$0	$0	$0	$0	$0	$0	$0
Subtotal	$18,793,000	$20,742,000	$21,178,000	$21,379,000	$21,750,000	$22,213,436	$22,746,000	$23,294,000	$172,095,436
EM&V[1]	$ -	$ 237,669	$ 242,431	$ 244,495	$ 247,000	$ 247,000	$ 247,000	$ 247,000	$ 1,712,595
Total Portfolio Program Year SoCalREN Budget	$ 18,793,000	$ 20,979,669	$ 21,420,431	$ 21,623,495	$ 21,997,000	$ 22,460,436	$ 22,993,000	$ 23,541,000	$ 173,808,031
Total Authorized Portfolio PY Budget Cap	$ 18,793,000	$ 20,979,669	$ 21,178,362	$ 21,626,000	$ 22,087,000	$ 22,560,000	$ 23,043,000	$ 23,541,000	$ 173,808,031
Forecast Portfolio PY TRC	0.19	0.27	0.22	0.37	0.43	0.51	0.55	0.57	
Forecast Portfolio PY PAC	0.21	0.29	0.25	0.56	0.67	0.86	0.9	0.91	

A. 2021 Budget Offset (*Uncommitted and Unspent for PY 2013-2019*)

In early 2020, SoCalREN and its IOU Partners (SCE and SoCalGas) performed a reconciliation exercise that identified all the unspent/uncommitted dollars since PY 2013. SoCalREN and its IOU partners identified $8,586,944 of ratepayer funds as unspent/uncommitted and not had been utilized to offset prior program year budget requests. This amount is not being utilized to true up the value requested for the SoCalREN 2021 ABAL budget. SoCalREN and its IOU Partners both agreed to not include forecasted PY 2020 uncommitted and unspent due to the uncertainty of the 2020 program year.

Table 3 below shows the budget uploaded to CEDARS and identifies the difference between the budget requested and the offset due to the IOU-SoCalREN reconciliation exercise for PY 2013-2019 unspent/uncommitted funds.

TABLE 3. SoCalREN 2021 Budget Request

SoCalREN 2021 CEDARs Budget	
Program/Portfolio Budget	$21,379,000

EM&V Budget	$244,495
Total SoCalREN 2021 Budget	**$21,623,495**
SoCalREN's 2021 Funding Request	
Program/Portfolio Budget	$21,379,000
EM&V Budget	$244,495
Total SoCalREN 2021 PY Spending Budget	$21,623,495
PY 2013- 2019 Unspent/Uncommitted Funds	$8,586,944
Total 2021 Funds to be Collected from Ratepayers	**$13,036,551**

VI. 2021 EE POTFOLIO SAVINGS

Table 3, 4 and 5 below provide SoCalREN's forecast of energy savings and demand reduction for SoCalREN's 2021 EE portfolio. All savings and cost-effectiveness figures used in this ABAL are direct outputs taken from the Commission-provided Cost-Effectiveness Tool (CET) on the CEDARS web platform,[4] which excludes a 5 percent adjustment for market effects.

Table 3. SoCalREN Annual Energy Savings Forecast, kWh

	Annual Rolling Portfolio Savings Forecast - True-up (Net kWh)							
Sector	2018	2019	2020	2021	2022	2023	2024	2025
Residential	2,881,748	5,474,356	6,231,734	5,561,381	5,361,529	6,508,842	6,583,640	6,494,906
Commercial	n/a	n/a	n/a	59,986	n/a	n/a	n/a	n/a
Industrial	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Agriculture	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Emerging Tech	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Public	n/a	n/a	299,250	2,520,000	2,694,433	2,822,355	2,993,355	3,084,522
Codes and Standards	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
WE&T	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finance	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
OBF Loan Pool	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total Forecast Portfolio Savings	2,881,748	5,474,356	6,530,984	8,141,367	8,055,962	9,331,197	9,576,995	9,579,428
SoCalREN 2019 ABAL Savings Goals Adopted Submission[1]	-	5,474,356	5,541,961	5,652,735	5,765,953	5,881,614	5,998,904	6,118,638
Forecast Savings as a % of PY 2019 ABAL Adopted Submission	-	***100%***	***118%***	***144%***	***140%***	***159%***	***160%***	***157%***

Table 4. SoCalREN Annual Energy Savings Forecast, kW

[4] https://cedars.sound-data.com/filings/dashboard/

	Annual Rolling Portfolio Savings Forecast - True-up (kW)							
Sector	2018	2019	2020	2021	2022	2023	2024	2025
Residential	685	735	1,120	313	221	275	257	239
Commercial	n/a	n/a	n/a	6	n/a	n/a	n/a	n/a
Industrial	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Agriculture	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Emerging Tech	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Public	n/a	n/a	27	559	242	255	267	281
Codes and Standards	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
WE&T	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finance	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
OBF Loan Pool	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total Forecast Portfolio Savings	685	735	1,147	878	463	530	524	520
SoCalREN 2019 ABAL Savings Goals Adopted Submission [1]	-	735	744	759	774	790	805	822
Forecast Savings as a % of PY 2019 ABAL Adopted Submission	-	***100%***	***154%***	***116%***	***60%***	***67%***	***65%***	***63%***

Table 5. SoCalREN Annual Energy Savings Forecast, Therms

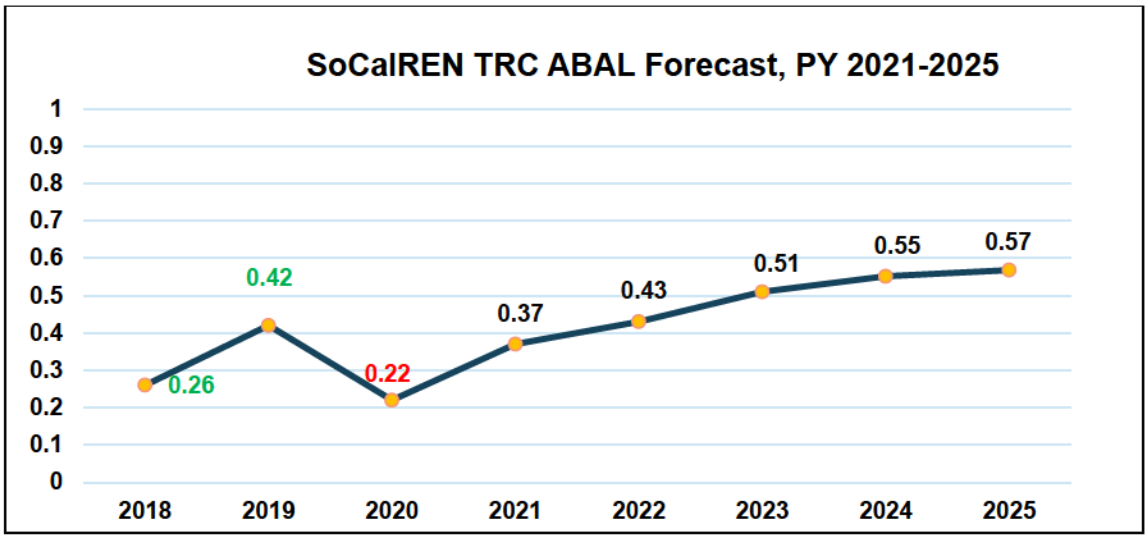
	Annual Rolling Portfolio Savings Forecast - True-up (therms)							
Sector	2018	2019	2020	2021	2022	2023	2024	2025
Residential	96,632	154,471	190,573	503,387	412,594	530,347	512,433	462,514
Commercial	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Industrial	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Agriculture	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Emerging Tech	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Public	n/a	n/a	748	711	6,733	7,070	7,423	7,794
Codes and Standards	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
WE&T	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finance	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
OBF Loan Pool	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total Forecast Portfolio Savings	96,632	154,471	191,321	504,098	419,327	537,417	519,856	470,308
SoCalREN 2019 ABAL Savings Goals Adopted Submission [1]	-	154,471	156,652	159,783	162,983	166,253	169,568	172,953
Forecast Savings as a % of PY 2019 ABAL Adopted Submission	-	***100%***	***122%***	***315%***	***257%***	***323%***	***307%***	***272%***

VII. 2021 PORTFOLIO COST-EFFECTIVENESS

As stated above, SoCalREN anticipates achieving a 0.37 TRC and aims to progressively increase that value over the rolling portfolio term each year with the existing authorized budget cap. COVID-19 has presented significant challenges to the energy efficiency industry resulting in significant loss regarding portfolio momentum achieved in 2019. SoCalREN is still assessing the impact of COVID-19 on the energy landscape, and what it means for future development and implementation of EE programs and services.

Despite the impacts of Covid-19t, SoCalREN is forecasted to increase its TRC over the next 4 years. Figure 1 below provides a snapshot to this trajectory.

Figure 1. SoCalREN TRC Forecast, 2021-2025[5]



Tactics deployed to drive this increase include but not limited to:

- Price reductions in third-party implemented contracts, allowing more resources to become available for implementation of new cost-efficient resource strategies;
- Increased resources for innovative strategies that result in quantifiable energy savings;
- Leveraging additional partnerships with local governments to collaborate and lessen the ratepayer cost burden;
- Reduction in travel costs due to remote capable strategies;
- Reducing overall program costs while aggressively increasing savings over the near term for new and existing resource strategies;
- Utilizing approaches in underserved sectors that capture below code stranded savings;
- Identifying areas that reduce SoCalREN administrative costs.

VIII. 2021 PROPOSED PROGRAM AND PORTFOLIO CHANGES

1. SoCalREN 2021 Portfolio Level Changes

SoCalREN's 2021 EE Portfolio continues to leverage well established successes that were originally adopted during the inception of the RENs in D.12-11-015 and conforms to the authorization adopted in D.18-05-041. SoCalREN's 2021 EE portfolio is a continuation of

[5] 2018 -2019 TRC reflects actual reported; 2020 TRC reflects anticipated EOY and impacts of Covid-19; 2021-2025 reflects forecast and recovery;

SoCalREN's commitment to adopt a "long-term" path towards administrative efficiency and its endeavor to find areas that maximize outcomes, customer benefits, and program performance, while minimizing costs. This path includes tactics such as:

- Identifying administrative tasks within program implementation that can be automated or eliminated so long as regulatory compliance or customer support is not compromised.
- Leveraging external resources to offer more strategies while reducing EE ratepayer cost burden.
- Identifying strategies that are no longer viable and adjusting the portfolio for these changes.

2. Reduced and Expanded Programs

SoCalREN has proposed in this advice filing some performance adjustments to its existing portfolio that allocates more funding resources to quantifiable energy saving strategies thus providing the needed diversification to increase portfolio cost-effectiveness.

Pursuant to D.18-05-041, Table 6 below reflects the list of reduced and expanded programs whose total budget increased or decreased by more than 40%. In SoCalREN's PY 2021 planning efforts to achieve goals cost-effectively, SoCalREN optimized its portfolio by expanding resource programs, while shifting funds from programs that have not yet been fully launched within the market. This optimization allows for greater achievement in claimable savings while allowing certain strategies not yet fully up to scale to increase overtime and ensure that every ratepayer dollar within the portfolio is being efficiently utilized in PY 2021.

Table 6. List of Expanded and Reduced Programs

Program ID	Program Name
Program Closures	
SCR-RES-A2	Residential Community Coordinator
New Program Proposed for CPUC Approval	
SCR-RES-A4	Kits 4 Kids
SCR-COM-E1	Healthy Stores Refrigeration Energy Efficiency Program
Existing Programs with Enhanced Budgets >40%	
SCR-WET-D1	Workforce Education & Training
Existing Programs with Enhanced Budgets <40%	
SCR-PUB-B3	Public Agency NMEC Program

3. SoCalREN 2021 Program Level Changes

Except as discussed below, the SoCalREN portfolio of programs will remain primarily the same as 2020 offerings with no changes in current program design.

a) Reduced Programs and Sub-programs

Due to Covid-19, various activities that necessitate a person-person touchpoint or activities that require group engagement are no longer permitted or appropriate during this pandemic. Mid-year 2020, SoCalREN acknowledged that in-person workshops or outreach would not be viable in the current EE market. SoCalREN will formally close the Residential Community Coordinator (RCC) program due to the program's original strategies regarding engagement, and outreach. SoCalREN's RCC program utilized a single point of contact approach based on public agency community engagement. Some of the objectives of the RCC program were to host community workshops for non-primary English-speaking multifamily property owners. The RCC program also included multi-language SPOC services and tools for incorporating multifamily retrofits in multifamily property owner buildings.

There still exists significant value in a multi-language SPOC that serves hard-to-reach multifamily property owners and the multi-language tools/materials to support this hard-to-reach segment. However, these strategies can continue under SoCalREN's existing Multifamily Program as sub-strategies. By moving the value-added multi-language strategies and SPOC into the current Multifamily Program, the SoCalREN can realize administrative efficiencies and eliminate non-viable strategies in the current market. Specifically, strategies that no longer are feasible given the current pandemic.

In addition, SoCalREN is proposing to reduce its Public Agency NMEC program by -76% compared to PY 2019. Based on sector optimization within the SoCalREN's Public Sector. The implementation tasks that would normally be required by an EE program are realized through SoCalREN's Public Agency EE Project Delivery Program (EE PDP). SoCalREN's EE PDP program serves as a one stop-shop for all public agencies participating in any SoCalREN public agency program including SoCalREN"s NMEC program. This allows for the elimination of duplicative services. All services remain offered (i.e. enrollment, technical assistance, IOU application support, project scope development, etc). The only items that must remain in the Public Agency NMEC program are tasks specifically associated with NMEC implementation (i.e.

NMEC EM&V, marketing and or education materials specifically addressing NMEC benefits, etc) This reduction was identified through SoCalREN's continued portfolio optimization.

b) Enhanced Programs and Sub-programs

As mentioned previously Covid-19 has presented significant challenges, however it has also presented significant opportunities. The EE industry is faced with significant challenges and much of the momentum has been lost however the need for climate action and support remain prevalent more than ever. One of SoCalREN's Covid-19 mitigation strategies to ramp up the capacity building and EE knowledge across all its sectors. SoCalREN is proposing to almost double its Workforce Education and Training budget, specifically enhance the WE&T program budget by +81% for PY 2021. This will allow SoCalREN to continue its successful capacity building strategies that serve disadvantaged workers, small business contractors such as Women-Minority- Disabled Veterans Business Owned Enterprises (WMDVBEs) and youths but at a much larger scale. These existing strategies include but not limited to:

- Contractor Training for IOU and SoCalREN Program participation
- Contractor Training to participate in Public Agency EE retrofit project solicitations
- ACES Youth program
- E-Contractor Academy – specific handheld training that provides the necessary support for a small WMDVBE to successfully develop a EE retrofit project bids and compete against large contractors.

In addition, SoCalREN through its peer-to-peer collaboration with its regional partners will be implementing a sub-strategy within its WE&T program that aims to assist "at-risk" transition age youth by providing them access to certified training so that they may enter the EE industry workforce. This sub-strategy will leverage much of the current SoCalREN's WE&T program processes and administration so that minimal ratepayer funds can be burden. SoCalREN's WE&T program implementation plan will be formally updated to include this sub-strategy in Q4 2020.

c) New Programs and Sub-programs

SoCalREN is also proposing one new residential program, SoCalREN's Kits for Kids program. This program seeks to create "climate action leaders" through fourth grade students with the guided assistance of their parents or guardians. This program is being proposed as a resource programs that also building longer EE competency in the residential market segment while

contributing to the State's Energy Efficiency goals of a long-term persistence of savings. Specific details of this proposed program can be found in Attachment D. This strategy also aims at mitigating the impacts that Covid-19 has presented not only to the EE industry but the residential sector.

In addition, SoCalREN has included the proposed program from its July 7, 2020 Advice Letter filing 12-E/12-G, SoCalREN's Healthy Stores Refrigeration Energy Efficiency Program (HSREEP). Details of this proposed program can be found in Attachment E.

IX. 2021 EE PORTFOLIO METRICS

A. CPUC Common Metric Targets

Due to the COVID-19 crisis and the implementation of new programs, SoCalREN submits updated Common Metric targets for Commission review and approval.[6] These revised targets reflect updated short, mid and long-term targets values for its portfolio and authorized sectors that take in consideration strategies adopted in SoCalREN's PY 2021 ABAL filing.

As mentioned above, COVID-19 will have short- and long-term impacts on all energy sectors including energy efficiency. SoCalREN is still assessing the impact of COVID-19 on the energy landscape, and what it means for future development and implementation of EE programs and services. SoCalREN foresees short-term negative impacts in energy savings across the entire EE portfolio due to COVID-19, and those challenges will be reflected in the updated common metrics targets. However, strategies implemented over the life of the Business Plan portfolio period will allow for an increasing trajectory.

1. Progress to Date

D.18-05-041 Ordering Paragraph (OP) 11 directs each Program Administrator (PA) to include its metrics results and assessments in the PA's EE annual reports. To access SoCalREN's most recent metrics report, see SoCalREN's 2019 EE Annual Report for metrics and assessments for Program Year 2018.

B. SoCalREN Unique Value Metrics

[6] D.18-05-011

Per D.19-12-021, SoCalREN is also proposing new "value metrics" as directed by the Commission decision and CPUC staff. In addition, D.19-12-021 also reaffirmed the value of public agency leadership to meet local needs and priorities while pooling energy management resources. Through this decision the Commission acknowledged the distinct value of REN's and the unique capacities local governments may bring in the delivery of energy efficiency. To convey this unique value the Commission also requested the following:

"RENs must state their desired outcome from activities that fill gaps of other program administrators. The RENs shall also propose savings goals and metrics associated with their unique value, as well as a methodology for measuring progress toward their metrics, in their business plans and ABALs."

Attachment F of this filing contains in detail SoCalREN's unique capacities, its core values, its activities that fill gaps of other program administrators, and its proposed methodology for measuring progress toward not only the State's objectives but its mission.

The value metrics provided in Attachment F are quantifiable measurements within each of SoCalREN's core value categories that demonstrate SoCalREN's impacts helping to reduce GHG emissions and increase energy savings. These are focused measurements, intended to directly speak to the value that SoCalREN provides to the State. Since these metrics have not been formally reported in prior years, SoCalREN intends to utilize 2020 as a baseline year. Once PY 2020 data is finalized and reported, SoCalREN will work to develop targets for the near, mid and long-term future. First year baseline will be included in SoCalREN's 2019 Annual Compliance Report. SoCalREN anticipates targets to be included in either the next ABAL or Business Plan filing.

Protests

Anyone may protest this Advice Letter. The protest must state the grounds upon which it is based. The protest must be made in writing and received by the Commission within 20 days of the date this Advice Letter was filed with the Commission. There is no restriction on who may file a protest. The address for mailing or delivering a protest to the Commission is:

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

Copies of the protest should also be sent via e-mail to the attention of the Energy Division at EDTariffUnit@cpuc.ca.gov. It is also requested that a copy of the protest be sent by email to addresses shown below on the same date it is mailed or delivered to the Commission.

Minh Le
Energy and Environmental Services
General Manager
County of Los Angeles Office
1100 North Eastern Avenue
Los Angeles, CA 90063-3200
(323) 267-2006
MSLe@isd.lacounty.gov

Effective Date

Per D.14-10-046 this Advice Letter is subject to Energy Division disposition and should be classified as Tier 2 (effective after staff approval) pursuant to General Order (GO) 96-B. The SoCalREN respectfully requests that this Advice Letter be made effective on October 1, 2020, which is 30 calendar days after the date filed.

Notice

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

Respectfully Submitted,

/s/ Minh Le

Minh Le, General Manager
Energy and Environmental Services
County of Los Angeles Office
1100 North Eastern Avenue
Los Angeles, CA 90063-3200
(323) 267-2006
MSLe@isd.lacounty.gov

Attachment A – SoCalREN 2021 ABAL Tables

Table 1. SoCalREN 2021 PY Budget and Savings

Sector	Program Year Budget	SoCalREN FORECAST ENERGY SAVINGS (Net) Forecast kWh	Forecast kW	Forecast therms (MM)
Residential	$7,900,000	5,561,381	313	503,387
Commercial	$500,000	59,986	6	-
Industrial	$0	na	na	na
Agriculture	$0	na	na	na
Emerging Tech	$0	na	na	na
Public	$10,979,000	2,520,000	559	711
Codes and Standards	$0	na	na	na
WE&T	$700,000	na	na	na
Finance	$1,300,000	na	na	na
OBF Loan Pool	$0	na	na	na
Subtotal	$21,379,000	8,141,367	878	504,098
SoCalREN PY 2019 ABAL 2021 Savings Goal Adopted Submission [1]		*5,652,735*	*759*	*159,783*
Forecast Savings as a % of PY 2019 ABAL Adopted Submission		***144%***	***116%***	***315%***
SoCalREN EM&V[2]	$244,495			
Total SoCalEN PY Spending Budget[3]	$21,623,495			
Uncommitted and Unspent Carryover balance *(PY 2013-2019)*[4]	$8,586,944			
Total SoCalREN PY Budget Recovery Request[5]	$13,036,551			
Authorized PY Budget Cap (D.18-05-041)	$21,626,987			

Forecast PY TRC	0.37
Forecast PY PAC	0.56

SoCalREN Unspent Committed funds (from all prior PY through December 31, 2020)	$0

Footnotes:
1 Per D. 19-08-034, p. 28.

[2] Per D.16-08-019, the SoCalREN 2020 EM&V budget is based on the proportion of IOU allocated EM&V funds.

[3] Total proposed program year budget spending, including uncommitted unspent carryover

[4] The balance included this filing reflects the IOU Partner - SoCalREN Reconciliation Excercise of uncomitted/un spent funds from program years 2013-2019. Due to the uncertainity regarding 2020, both the IOU Partners (SCE and SoCalGas) and SoCalREN agreed it is too early to identify at this time. However, the value of unspent/uncomitted funds for years 2013-2019 will help true up the collected ratepayer balance thus allowing the IOU partners the need for a small budget recovery request for 2021 and relieving ratepayer collection.

[5] Amount of funds to be collected for the Program Year - Line 18 less Line 19

Table 2. SoCalREN 2021 Annual Rolling Portfolio Budget Forecast - True-up

	Annual Rolling Portfolio Budget Forecast - True-up								
Sector	**2018****	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**2025**	**Total**
Residential	$6,540,000	$6,721,000	$7,578,000	$7,900,000	$8,110,000	$8,150,436	$8,200,000	$8,250,000	$61,449,436
Commercial	$0	$0	$0	$500,000	$0	$0	$0	$0	$500,000
Industrial	$0	$0	$0	$0	$0	$0	$0	$0	$0
Agriculture	$0	$0	$0	$0	$0	$0	$0	$0	$0
Emerging Tech	$0	$0	$0	$0	$0	$0	$0	$0	$0
Public	$9,815,000	$11,500,000	$11,750,000	$10,979,000	$11,640,000	$12,043,000	$12,446,000	$12,894,000	$93,067,000
Codes and Standards	$0	$0	$0	$0	$0	$0	$0	$0	$0
WE&T	$258,000	$284,000	$350,000	$700,000	$400,000	$400,000	$450,000	$500,000	$3,342,000
Finance	$2,180,000	$2,237,000	$1,500,000	$1,300,000	$1,600,000	$1,620,000	$1,650,000	$1,650,000	$13,737,000
OBF Loan Pool	$0	$0	$0	$0	$0	$0	$0	$0	$0
Subtotal	$18,793,000	$20,742,000	$21,178,000	$21,379,000	$21,750,000	$22,213,436	$22,746,000	$23,294,000	$172,095,436
EM&V[1]	$ -	$ 237,669	$ 242,431	$ 244,495	$ 247,000	$ 247,000	$ 247,000	$ 247,000	$ 1,712,595
Total Portfolio Program Year SoCalREN Budget	$ 18,793,000	$ 20,979,669	$ 21,420,431	$ 21,623,495	$ 21,997,000	$ 22,460,436	$ 22,993,000	$ 23,541,000	$ 173,808,031
Total Authorized Portfolio PY Budget Cap	$ 18,793,000	$ 20,979,669	$ 21,178,362	$ 21,626,000	$ 22,087,000	$ 22,560,000	$ 23,043,000	$ 23,541,000	$ 173,808,031
Forecast Portfolio PY TRC	0.19	0.27	0.22	0.37	0.43	0.51	0.55	0.57	
Forecast Portfolio PY PAC	0.21	0.29	0.25	0.56	0.67	0.86	0.9	0.91	

**** "Reset" 2018 budget at or below 2018 annual budget approved in Business plan Decision. "True-up" years 2019-2025.**

[2] Per D.16-08-019, the SoCalREN 2020 EM&V budget is based on the proportion of IOU allocated EM&V funds which differ year by year. EM&V Budgets provided for 2020-2025 remain constant and will be updated annually for each ABAL filing based on updated IOU EM&V allocated budgets.

Table 3. SoCalREN 2021 Annual Rolling Portfolio Savings Forecast - True-up (Net kWh)

	Annual Rolling Portfolio Savings Forecast - True-up (Net kWh)							
Sector	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**2025**
Residential	2,881,748	5,474,356	6,231,734	5,561,381	5,361,529	6,508,842	6,583,640	6,494,906
Commercial	n/a	n/a	n/a	59,986	n/a	n/a	n/a	n/a
Industrial	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Agriculture	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Emerging Tech	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Public	n/a	n/a	299,250	2,520,000	2,694,433	2,822,355	2,993,355	3,084,522
Codes and Standards	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
WE&T	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finance	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
OBF Loan Pool	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total Forecast Portfolio Savings	2,881,748	5,474,356	6,530,984	8,141,367	8,055,962	9,331,197	9,576,995	9,579,428
SoCalREN 2019 ABAL Savings Goals Adopted Submission [1]	-	5,474,356	5,541,961	5,652,735	5,765,953	5,881,614	5,998,904	6,118,638
Forecast Savings as a % of PY 2019 ABAL Adopted Submission	-	***100%***	***118%***	***144%***	***140%***	***159%***	***160%***	***157%***

Footnotes:

[1] Per D. 19-08-034, p.28.

Table 4. SoCalREN 2021 Annual Rolling Portfolio Savings Forecast - True-up (Net kW)

	Annual Rolling Portfolio Savings Forecast - True-up (kW)							
Sector	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**2025**
Residential	685	735	1,120	313	221	275	257	239
Commercial	n/a	n/a	n/a	6	n/a	n/a	n/a	n/a
Industrial	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Agriculture	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Emerging Tech	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Public	n/a	n/a	27	559	242	255	267	281
Codes and Standards	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
WE&T	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finance	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
OBF Loan Pool	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total Forecast Portfolio Savings	685	735	1,147	878	463	530	524	520
SoCalREN 2019 ABAL Savings Goals Adopted Submission [1]	-	735	744	759	774	790	805	822
Forecast Savings as a % of PY 2019 ABAL Adopted Submission	-	***100%***	***154%***	***116%***	***60%***	***67%***	***65%***	***63%***

Footnotes:

[1] Per D. 19-08-034, p.28.

Table 5. SoCalREN 2021 Annual Rolling Portfolio Savings Forecast - True-up (Net Therms)

	Annual Rolling Portfolio Savings Forecast - True-up (therms)							
Sector	2018	2019	2020	2021	2022	2023	2024	2025
Residential	96,632	154,471	190,573	503,387	412,594	530,347	512,433	462,514
Commercial	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Industrial	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Agriculture	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Emerging Tech	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Public	n/a	n/a	748	711	6,733	7,070	7,423	7,794
Codes and Standards	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
WE&T	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finance	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
OBF Loan Pool	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total Forecast Portfolio Savings	96,632	154,471	191,321	504,098	419,327	537,417	519,856	470,308
SoCalREN 2019 ABAL Savings Goals Adopted Submission [1]	-	154,471	156,652	159,783	162,983	166,253	169,568	172,953
Forecast Savings as a % of PY 2019 ABAL Adopted Submission	**-**	***100%***	***122%***	***315%***	***257%***	***323%***	***307%***	***272%***

Footnotes:

[1] **Per D. 19-08-034, p.28.**

Attachment B – CEDARS Filing Confirmation

CEDARS FILING SUBMISSION RECEIPT

The SCR portfolio filing has been submitted and is now under review. A summary of the filing is provided below.

PA: Southern California Regional Energy Network (SCR)

Filing Year: 2021

Submitted: 21:37:43 on 01 Sep 2020

By: Lujuana Medina

Advice Letter Number: 13-E-G

* Portfolio Filing Summary *

- TRC: 0.3652
- PAC: 0.5598
- TRC (no admin): 0.7638
- PAC (no admin): 2.7969
- RIM: 0.5598
- Budget: $21,623,494.58

* Programs Included in the Filing *

- SCR-COM-E1: Healthy Stores Refrigeration EE Program
- SCR-EMV-01: SoCalREN EM&V;
- SCR-FIN-C1: Public Agency Revolving Loan Fund
- SCR-FIN-C2: Residential Loan Loss Reserve
- SCR-PUBL-B1: Energy Efficiency Project Delivery Program
- SCR-PUBL-B2: DER DAC Project Delivery Program
- SCR-PUBL-B3: Public Agency NMEC Program
- SCR-RES-A1: Multifamily Program
- SCR-RES-A4: Residential Kits4Kids
- SCR-WET-D1: Workforce Education & Training Program

Attachment C – Per D.18-05-041, Supplemental Budget Information

Table of Contents

Approved Meet & Confer Document by Program Administrators, Office of Ratepayers and The Utility Reform Network

I. DESCRIPTION OF IN-HOUSE EE ORGANIZATIONAL STRUCTURE & ASSOCIATED EESTS

A. Narrative description of in-house departments/organizations supporting the PA's EE portfolio

SoCalREN is currently administered and managed by the County of Los Angeles Internal Services Department (ISD). Within LA County ISD there are three departments that support the administration and management of SoCalREN. These departments include:

- County Office of Sustainability (EES):
  - Environmental Initiatives Division
  - EES Planning & Administration
- Information Technology Service
  - Shared Services Branch Internet Development
- Administration & Finance Service
  - Finance

These departments work as shared services between LA County's workforce of more than 100,000 employees in over 40 County Departments, and the County's government and community initiatives portfolio (including the Regional Energy Network). These departments are further described in detail below.

1) Functions conducted by each department/organization

Office of Energy and Environmental Services. The LA County Office of Energy and Enviornmental Services (EES) is comprised of two divisions (the Energy Management Division (EMD) and the Environmental Initiatives Division (EID)), and coordinates energy efficiency, climate action, conservation, and sustainability programs to decrease utilization and maximize the efficient use of natural resources. Some initiatives that this office supports include: climate mitigation, energy efficiency, land-use planning, alternative fuels and transportation.

EES was originally formed to respond to legislation, regulation and policy related to Climate Change and to serve as a central programmatic agency for coordination of Energy Efficiency, Conservation and Sustainability Programs within the County, its facilities and the region. EES develops and implements programs and projects that impact and benefit the constituents of Los Angeles County, for instance: the Southern California Energy network, Environmental Service Center, and websites such

as SolarMap.LACounty.gov and Green.LACounty.gov. In addition, EES is playing an important role in coordinating and implementing Energy and Environmental initiatives, County Green Building programs, and Climate Action activities for the State, region and all County departments.

Between the two EES Divisions, EID works internally with County departments and also represents the County in local and statewide organizations to promote energy efficiency, sustainability, climate action planning, related regulatory and legislative review and advisement, and environmental programs and policies. These efforts are supported through various funding sources, such as grants and utility ratepayer programs.

EMD supports the County and ISD by providing energy management services to County Departments, municipalities, and other districts and agencies. Services include utility support, energy efficiency projects, monitoring of building management systems, procurement of electricity, natural gas and water, and the operation of power plants. The Division is comprised of four sections, Power Plants, Energy Efficiency Projects, Energy Support Services, and Energy Management Systems (EEMIS).

Information Technology Service. ISD Information Technology Services (ITS) delivers reliable and secure solutions to support Los Angeles County's technology needs. Providing services to a workforce of more than 80,000 employees in over 40 County Departments, the department safeguards and support mission-critical systems, networks and data. ITS comprehensive information technology shared services include: application development and maintenance, data center operations, telecommunications support, countywide email solutions and cloud computing services.

Administration & Finance Service. ISD's Administration and Finance Service provides legal, procurement, compliance, and oversight services to EID Programs, including the SoCalREN. In addition, these units assist our business partners and customers in making informed decisions by providing essential information, timely payments and billings and budgetary allocations (including vendor payment inquiry, employment opportunities and employment verification).

2) Management structure and org chart

Figure 1 and 2 provide in illustrative detail the current management structure, support staff and internal support organizations.

Figure 1. SoCalREN Administration and Management Organization Chart, 2021

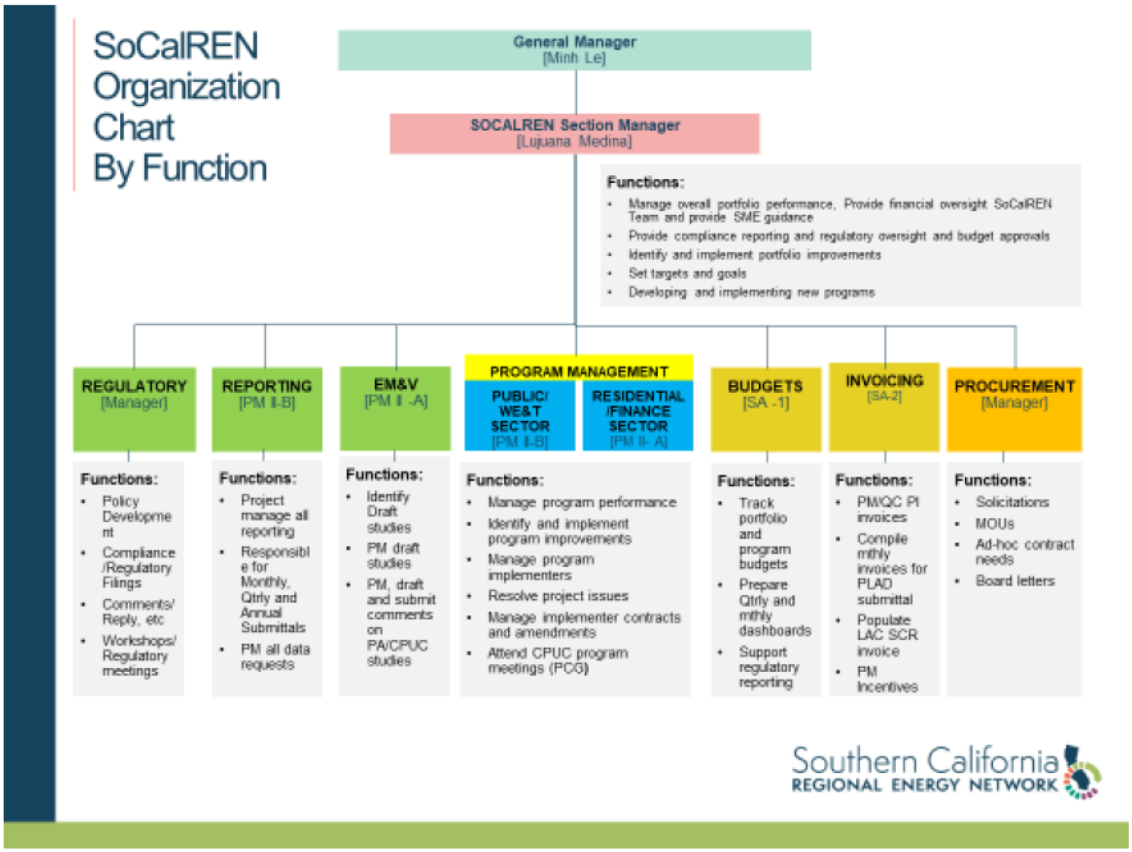
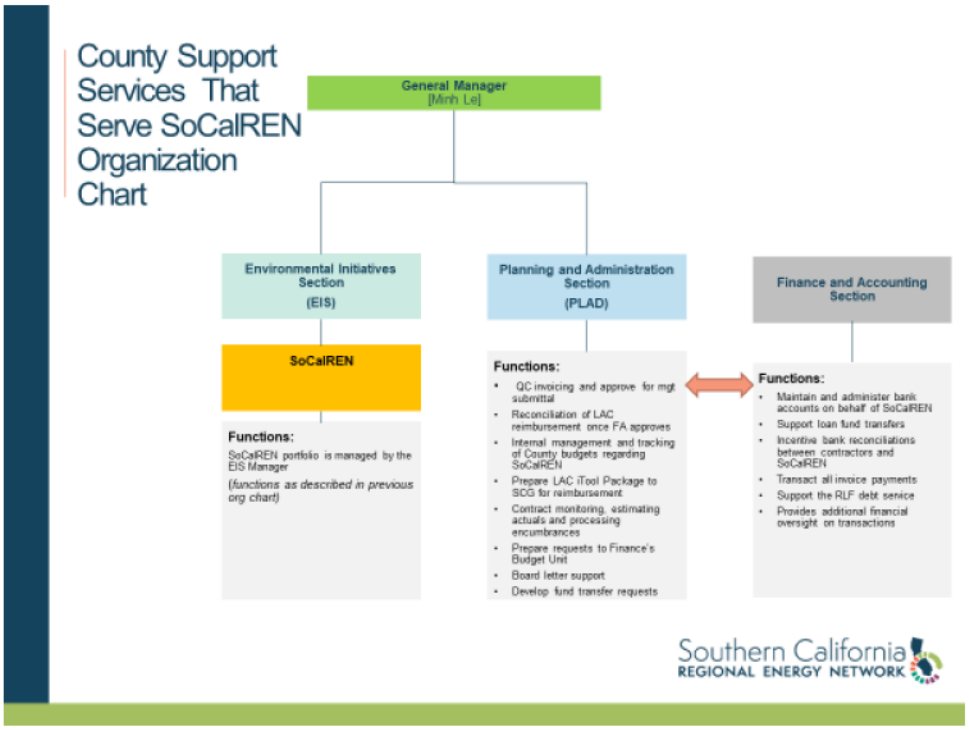


Figure 2. County Support Services That Serve SoCalREN Organization Chart



3) ***Staffing needs by department/organization, including current and forecast for 2021, as well as a description of what changes are expected in the near term (2022-2023 or why it's impossible to predict beyond 2021, if that's the PA's position.***

Currently, SoCalREN's staffing organization as is illustrated in Figure 1 above. In 2020, the County of Los Angeles officially hired two internal program managers to support the REN, two internal Staff Assistants/Program Coordinators and one internal manager. There are no current plans to change this staffing structure this coming year (2021) or within the near term (2022-2023).

4) ***Non-program functions currently performed by contractors (e.g. advisory consultants), as well as a description of what changes are expected in the near term (2022-2023) or why it's impossible to predict beyond 2021, if that's the PA's position.***

Since 2018, SoCalREN program administration, design, and implementation was currently outsourced to third parties that had been selected through a competitive bidding process by LA County, the Administrator of SoCalREN. SoCalREN does not currently nor anticipate in the near term contracting for "non-program" functions. Non-program, contract and billing, and some support functions were conducted by LA County ISD services, with statistically miniscule financial impact on SoCalREN.

As part of a recent program-by-program and Portfolio-wide performance assessment of the SoCalREN, LA County has taken in-house (and will continue to exercise) greater Portfolio planning, oversight, management, and performance tracking. This is an integral part of LA County's pivot to an energy-savings-centric, cost-conscious, and performance-based approach for the SoCalREN. This deeper engagement will reflect somewhat higher LA County administration costs, but these costs net positive against efficiencies and reduced costs of outside consultants. This impact will, however, be economically-scaled and not impact implementation.

Notwithstanding the above, the SoCalREN does plan to continue to outsource program design, and implementation. The intent is to continue to outsource virtually all components of program implementation in the future, pursuant to strict, comprehensive local government and statewide procurement and contracting requirements.

5) ***Anticipated drivers of in-house EESt changes by department/organization SoCalREN Response:***

As stated above, there are no current plans for in-house cost changes this coming year (2021) or within the near term (2022-2023).

6) ***Explanation of method for forecasting Costs***

B. Table showing PA EE "Full Time Equivalent" headcount by

department/organization

TURN and ORA have requested a table similar to the table provided in PG&E's 2017 General Rate Case (GRC) addressing its Energy Procurement department Full Time Equivalent (FTE) headcount. They have requested for 2016 or 2017 "recorded" positions, depending on what's most appropriate for the PA, or both, if that provides the most clarity. And would like the table to include as well forecast years, for at least 2018. Table 1 below is provided in response to ORA and TURN's request.

Table 1. SoCalREN's FTE headcount by department/organization[1,2]

Functional Group	2018 EE Portfolio FTE	2019 EE Portfolio FTE	2020 EE Portfolio FTE	2021 EE Portfolio FTE	2022 EE Portfolio FTE	2023 EE Portfolio FTE
Policy, Strategy, and Regulatory Reporting Compliance	0.8	1	1	1	1	1
Program Management	2.25	3.0	3.0	3.0	3.0	3.0
Engineering Services	0	0	0	0	0	0
Customer Application/Rebate/Incentive Processing	0.1	0.5	0.5	0.5	0.5	0.5
Customer Project Inspections	0	0	0	0	0	0
Portfolio Analytics	0.25	0.50	0.50	0.50	0.50	0.50
EM&V	0	1	1	1	1	1
ME&O	0.5	0.25	0.25	0.25	0.25	0.25
Account Management / Sales	0.25	0.1	0.1	0.1	0.1	0.1
IT	0.1	0.1	0.1	0.1	0.1	0.1
Call Center	0.1	0.0	0.0	0.0	0.0	0.0
Total	**4.35**	**6.45**	**6.45**	**6.45**	**6.45**	**6.45**

C. Table showing costs by functional area of management structure

Please see Tables 2 through 6 below which provides SoCalREN's costs by functional area of management structure.

Table 2. SoCalREN's Residential Sector Costs by Labor and Non-Labor Cost Elements

[1] Please note SoCalREN FTE head count include direct full-time SoCalREN staff and County Support Staff services (e.g. Finance, etc).

[2] Full-time equivalent (FTE) is a unit that indicates the workload of an employed person (or student) in a way that makes workloads or class loads comparable across various contexts.

SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK (SOCALREN)				
SUPPLEMENTAL 2021 EE BUDGET INFORMATION				
RESIDENTIAL BUDGET DETAIL				
Sector	Cost Element	Functional Group	2018 EE Portfolio Expenditures	2021 EE Portfolio Budget
Residential	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	5,609	100,147
		Program Management	115,476	309,382
		Engineering services	-	-
		Customer Application/Rebate/Incentive Processing	-	-
		Customer Project Inspections	-	-
		Portfolio Analytics	3,346	47,368
		ME&O (Local)	-	-
		Account Management / Sales	-	-
		IT	-	-
		Call Center		-
	Labor Total		124,431	456,897
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)		
		Local/Government Partnerships Contracts (3)		
		Other Contracts		
		Program Implementation	2,641,494	3,278,397
		Policy, Strategy, and Regulatory Reporting Compliance		
		Program Management		
		Engineering services		
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)		
		Account Management / Sales		
		IT		
		Call Center		
		Facilities		
		Incentives--(PA-implmeneted and Other Contracts Program Implementation) Programs	3,463,685	4,164,706
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)		
	Non-Labor Total		6,105,179	7,443,103
Residential Total			6,229,610	7,900,000
	Other (collected through GRC) (2)	Labor Overheads		

Table 3. SoCalREN's Public Sector Costs by Labor and Non-Labor Cost Elements

SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK (SOCALREN)				
SUPPLEMENTAL 2021 EE BUDGET INFORMATION				
PUBLIC SECTOR BUDGET DETAIL				
Sector	Cost Element	Functional Group	2018 EE Portfolio Expenditures	2020 EE Portfolio Budget
Public Sector	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	3,400	31,278.0
		Program Management	212,866	604,731.7
		Engineering services	-	-
		Customer Application/Rebate/Incentive Processing	13,675	37,423.0
		Customer Project Inspections	-	-
		Portfolio Analytics	4,680	13,843.0
		ME&O (Local)	2,189	9,257
		Account Management / Sales	967	4,934
		IT	6,899	7,281
		Call Center	430	-
	Labor Total		245,106	708,748
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)		
		Local/Government Partnerships Contracts (3)		
		Other Contracts		
		Program Implementation	7,713,197	10,270,252
		Policy, Strategy, and Regulatory Reporting Compliance		
		Program Management		
		Engineering services		
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)		
		Account Management / Sales		
		IT		
		Call Center		
		Facilities		
		Incentives--(PA-implmeneted and Other Contracts Program Implementation) Programs		
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)		
	Non-Labor Total		7,713,197	10,270,252
Public Sector Total			7,958,303	10,979,000
	Other (collected through GRC) (2)	Labor Overheads		

Table 4. SoCalREN's Commercial Sector Costs by Labor and Non-Labor Cost Elements

SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK (SOCALREN)				
SUPPLEMENTAL 2021 EE BUDGET INFORMATION				
COMMERCIAL BUDGET DETAIL				
Sector	Cost Element	Functional Group	2018 EE Portfolio Expenditures ($Million)	2021 EE Portfolio Budget ($Million)
Commercial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	-	15,870
		Program Management	-	99,130
		Engineering services	-	-
		Customer Application/Rebate/Incentive Processing	-	-
		Customer Project Inspections	-	-
		Portfolio Analytics	-	-
		ME&O (Local)	-	-
		Account Management / Sales	-	-
		IT	-	-
		Call Center	-	-
	Labor Total		-	115,000
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)		
		Local/Government Partnerships Contracts (3)		
		Other Contracts		
		Program Implementation	-	385,000
		Policy, Strategy, and Regulatory Reporting Compliance		
		Program Management		
		Engineering services		
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)		
		Account Management / Sales		
		IT		
		Call Center		
		Facilities		
		Incentives--(PA-implmeneted and Other Contracts Program Implementation) Programs		
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)		
	Non-Labor Total			385,000
Commercial Total				500,000
	Other (collected through GRC) (2)	Labor Overheads		

Table 5. SoCalREN's Cross-Cutting – Finance Costs by Labor and Non-Labor Cost Elements

SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK (SOCALREN)				
SUPPLEMENTAL 2021 EE BUDGET INFORMATION				
CROSS -CUTTING BUDGET DETAIL				
Sector	Cost Element	Functional Group	2018 EE Portfolio Expenditures	2021 EE Portfolio Budget
Cross Cutting	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	2,288	24,264
		Program Management	68,980	79,993
		Engineering services	-	-
		Customer Application/Rebate/Incentive Processing	1,289	12,757
		Customer Project Inspections		-
		Portfolio Analytics	865	6,443
		ME&O (Local)		-
		Account Management / Sales		-
		IT		-
		Call Center		-
	Labor Total		73,422	123,457
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)		
		Local/Government Partnerships Contracts (3)		
		Other Contracts		
		Program Implementation	406,405	1,876,543
		Policy, Strategy, and Regulatory Reporting Compliance		
		Program Management		
		Engineering services		
		Customer Application/Rebate/Incentive Processing		
		Customer Project Inspections		
		Portfolio Analytics		
		ME&O (Local)		
		Account Management / Sales		
		IT		
		Call Center		
		Facilities		
		Incentives--(PA-implmeneted and Other Contracts Program Implementation) Programs		-
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)		
	Non-Labor Total			1,876,543
Cross Cutting Total			479,827	2,000,000
	Other (collected through GRC) (2)	Labor Overheads		

D. Table showing Cost drivers across the EE organization

Since SoCalREN's inception, cost drivers such as commodity prices or regulatory mandates have

not been tracked. However through the energy efficiency business plan exercise, SoCalREN has found the need for increased regulatory and policy support as well as a need for increased coverage across a variety of proceedings. As the CPUC moves to a more integrated approach to planning, energy efficiency administrators will need to be engaged in activities that assist the CPUC is meeting state legislation and the arduous task of integrated resource planning. SoCalREN will make an effort to begin to track these costs and evaluate different cost drivers in an effort to optimize administration and ensure implementation of the REN is done with the up most efficiency.

E. Explanation of allocation of labor and O&M Costs between EE-functions and GRC- functions or other non-EE functions

1) When an employee spends less than 100% of her/his time on EE, how are Costs tracked and recovered (e.g., on a pro rata basis between EE rates and GRC rates; when time exceeds a certain threshold, all to EE; etc.).

SoCalREN as a non-IOU PA does not have applicable GRC costs or rates. However, LA County ISD who administrates and manages SoCalREN utilizes a daily "timesheet" and program/projects code menu that all employees use to track activities and the respective times allocated to those activities. Activities and time spent supporting those can easily be tracked by initiative as well as by county departments.

2) Describe the method used to determine the proportion charged to EE balancing accounts for all employees who also do non-EE work.

As a non-IOU PA, this question is not applicable to SoCalREN.

3) Identify the EE functions that are most likely to be performed by employees who also do non-EE work (e.g. Customer Account Representatives?)

As mentioned previously in Section II A, SoCalREN is supported by a few of the departments within LA County ISD and these departments act as shared services and support more than 100,000 employees in 40 county departments as well as a multitude of county initiatives. Below is a list of some of the EE functions currently performed by LA County ISD department who also support non-EE county initiatives:

- County Office of Sustainability (EES):
  - Environmental Initiatives Division: program management and oversight, policy, strategy, and regulatory reporting compliance;
  - EES Planning & Administration: contract management and billing and invoicing;
- Information Technology Service

- Shared Services Branch Internet Development: website and software support

- Administration & Finance Service
  - Finance: payroll services, vendor management;

4) Are labor Costs charged to EE fully loaded?

Yes, loaded LA County rates that would apply to EE Labor charges include the following:

- ISD-County Office of Sustainability Overhead
- Top Step Variance[3]
- Employee Benefits
  - Salaries & Wages
  - County Employee Retirement (Pension)
  - Workers' Compensation
  - Flexible Benefits Plan
  - Thrift Plan (Horizons)
  - Other Employee Benefits
  - Retiree Health Insurance
  - FICA (OASDI)
  - Dependent Care Spending Account
  - Disability Benefits
  - Dental Insurance
  - Health Insurance
  - Life Insurance
  - Unemployment Insurance
  - Savings Plan

5) How are burden benefit-related administrative and general (A&G) expenses for employees who work on EE programs recovered (EE rates or GRC rates)? **PG&E allocates these Costs to EE pursuant to a settlement agreement with MCE and TURN, which was adopted in D.14-08-032.

As a non-IOU PA, this question is not applicable to SoCalREN.

6) When EE and non-EE activities are supported by the same non-labor resources, how are the Costs of those resources or systems allocated to EE and non-EE activities?

SoCalREN program administration, design, and implementation is currently outsourced to third

[3] Ratio of actual salaries to budgeted salaries. As per LA County HR policy, salaries are budgeted at maximum rates, although employees may be at lower step salaries.

parties. SoCalREN non-labor resources and attributing Costs are only allocated to EE activities as dictated by Decision (D.)12-11-015.[4] Currently, all SoCalREN non-labor resource allocations only support EE activities.

7) ***Identify the EE O&M Costs that are most likely to be spread to non-EE functions as well as EE, if any***

As a non-IOU PA, this question is not applicable to SoCalREN.

II. BUDGET TABLES INCLUDING INFORMATION IDENTIFIED IN THE SCOPING MEMO

A. Attachment-A, Question C.8

SUPPLEMENTAL 2021 EE BUDGET INFORMATION
PORTFOLIO SUMMARY

	2018 EE Portfolio Expenditures				2021 EE Portfolio Budget				2018 EE Portfolio Savings**			2021 EE Portfolio Forecasted Savings		
Sector	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	KWH	KW	MTHERMS	KWH	KW	MTHERMS
Residential	$ 124,431	$ 2,641,494	$ 3,463,685	$ 6,229,610	$ 456,897	$ 3,278,397	$ 4,164,706	$ 7,900,000	2,881,748	685	96,632	5,561,381	313	503,387
Commercial	$ -	$ -	$ -	$ -	115,000.00	385,000.00	-	$ 500,000				59,986	6	-
Agricultural	$ -	$ -	$ -	$ -	-	-	-	-						
Industrial	$ -	$ -	$ -	$ -	-	-	-	-						
Public (GP)	$ 245,106	$ 7,713,197	$ -	$ 7,958,303	$ 708,748	$ 10,270,252	-	$ 10,979,000	-	-	-	2,520,000	559	711
Cross Cutting*	$ 73,422	$ 406,405	$ -	$ 479,827	$ 123,457	$ 1,876,543	-	$ 2,000,000						
Total Sector Budget	442,959	10,761,096	3,463,685	14,667,740	$ 1,404,102	$ 15,810,192	$ 4,164,706	$ 21,379,000	2,881,748	685	96,632	8,141,367	878	504,098
EM&V-PA	-	-	-	-	$ 220,046	$ 24,450	-	$ 244,495						
EM&V-ED														
OBF - Loan Pool														
EE Total	442,959	10,761,096	3,463,685	14,667,740	$ 1,624,147	$ 15,834,642	$ 4,164,706	$ 21,623,495	2,881,748	685	96,632	8,141,367	878	504,098

* Cross Cutting Sector includes Workforce Education & Training, Financing.

B. Attachment-A, Question C.9

Please see tables 2-5 provided above.

C. Attachment-A, Question C.10

SoCalREN does not have any anticipated solicitations at this time scheduled for the near term.

[4] D.12-11-015, p. 94.

Attachment D - Residential Program Proposal: Kits For Kids

Southern California Regional Energy Network
Kits for Kids Proposed Program Details

Contents

I. Introduction

In March 2020, the state of California was swiftly impacted by the world tragedy of the novel Coronavirus, COVID-19. This pandemic significantly impacted all aspects of daily life, from grocery shopping to government operations and on-going operations within all industry sectors, including the energy efficiency (EE) industry. Within the EE industry one particularly market was impacted more severely, specifically speaking the Residential EE sector, which relies heavily on in-person activities within personal residences.

When Governor Gavin Newsom first announced the Safer at Home orders in March 2020, the County immediately issued a directive to all SoCalREN Program staff (including the residential programs) and participating contractors to cease energy assessment, construction, and inspection work at participating residential properties to ensure the safety of all parties involved. This directive lasted two months; staff and Participating Contractors were released to resume activities (following a strict safety protocol) as of May 18, 2020.

The result of this temporary halt in activities is that many projects were delayed and thus timelines have grown, and, a few property owners have chosen to cancel their upgrades for 2020, either in an effort to be cautious surrounding the ongoing nature of the COVID-19 pandemic or due to adverse economic impacts the pandemic has brought to their businesses.

Therefore, SoCalREN faces a similar situation as many EE programs throughout California: seeking new and different ways to achieve energy savings goals without risking the health or welfare of individuals participating in or working on EE programs.

During the second quarter of 2020, SoCalREN focused efforts on designing alternative delivery methods to bring EE upgrades into residences throughout its service territory. One offering that resulted from this period of design, study, and discussion is the SoCalREN Kits for Kids program, described in this document.

In developing the design for this program, SoCalREN leveraged its peer-to-peer relationships with its regional partnerships and public agencies. Through this beneficial collaborative relationship SoCalREN was able to identify a focus strategy that could assist on building long term awareness and EE knowledge that would in-turn drive long term impacts. Primarily this collaborative team identified school children as opportunity to engage and enthrall to become "climate action leaders" thus driving savings within their homes but also providing the seed so that these youthful "climate action leaders" will continue to grow and become adult "climate action leaders."

In addition, SoCalREN reviewed other EE programs from California IOUs that serve school-age children, to ensure efforts were not duplicated and that additional, discrete audiences were reached by SoCalREN Kits for Kids. These programs included the SoCalGas LivingWise Program and the PEAK Program offered by California IOUs. Distinct differences between the proposed SoCalREN offering and existing programs include the focus on the home-based activity and reaching a different grade level audience from the existing programs.

This proposal contains preliminary details regarding the program. If authorized to implement SoCalREN will draft a Commission implementation plan and have the draft vetted through the public stakeholder process (CAEECC) which will then be filed as directed by Commission policy.

II. Kits for Kids Program

A. Program Description

SoCalREN Kits for Kids provides energy-saving measures to families within the SoCalREN service area who have fourth grade students attending schools within participating school districts who are currently enrolled in the SoCalREN Public Agency EE Project Delivery Program (PDP). A set of measures will be offered at no cost to participating students and their families via post-mail. 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 for Kids will provide educators with a classroom incentive grant. Kits for Kids will generate energy savings and provide relief to families in need now, and to educate future household decision-makers to continue prioritizing energy efficiency in the future.

1. Program Objectives

The program objectives of Kits for Kids are as follows:

1. Generate energy savings (kWh and therms) through the installation of measures in the homes of students participating in the Kits for Kids program.
2. Provide financial relief to families/households through both energy cost savings and the no-cost measures provided to households.
3. 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.
4. Drive climate action within residential communities.

B. Program Process and Supported Activities

Kits for Kids provides a model wherein families are provided with a home-based educational activity (Energy Efficiency Scavenger Hunt). The activity is designed to help the student make connections between concepts learned through fourth grade science and how the members of their household use energy at home, in a fun, hands-on fashion.

At a time when it is uncertain whether students will be able to return to a standard classroom format safely, SoCalREN has designed Kits for Kids to focus primarily on a fun home-based activity that engages families. In addition, an introductory activity with the classroom teacher will also be designed by the program and offered so that the teacher can be present in an in-person or virtual format and will focus on explaining the overall process to the students.

Upon completion of the remote teacher led introductory activity, students, along with their parent or guardian, will complete an online form to request delivery of the free energy efficiency kit and scavenger hunt activity. The Kit, which will contain educational materials for all members of the household along with free energy efficiency measures, will be shipped directly to the home.

Once the student and parent/guardian receive the Kit, they will tasked with performing a fun filled scavenger hunt activity which will identify the measures to be installed and where. Then alongside their parent or guardian the measures will be installed. At the point of installation, the activity will also request an electronic form of verification of measures installed. These will be in

the form of electronic photo that can be taken by the student or parent and will be uploaded to SoCalREN's Kits for Kids in-take webform.

In addition, information gathered during the Energy Efficiency Scavenger Hunt 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 post-ante information and will assist in determining energy savings associated with the free measures provided for installation.

The SoCalREN Kits for Kids program implementation team will be responsible for collecting the participants data and installation verification. They will collect each participants information and collectively aggregate each submittal by participating classroom to determine the classes' eligibility for the incentive classroom grant. Once the SoCalREN Kits for Kids program implementation team verifies installation and class achievement, the classroom teacher will be notified by the SoCalREN Kits for Kids program implementation team of the grant incentive achieved and it will be mailed to the respective school which can then be distributed to the classroom.

The free energy efficiency measures are designed to help households save energy and money. The home-based educational activity; additional activity book with games, puzzles and information on energy efficiency; and energy efficiency tip sheets are designed to educate the participating student and other household members about energy efficiency and the positive financial and environmental impacts associated with participating in EE and committing to EE behaviors.

Figure 1. Kits for Kids Participation Process

1. Additional Program details

- This program will be focused in targeted areas in the SoCalREN service area that are currently underserved.
- Students complete an in-class or virtual introduction with the teacher that aligns with California Department of Education Content Standards for fourth grade Science.
- Students complete the primary at-home activity (Scavenger Hunt) with their Parent/Guardian.
- Information gathered in the Scavenger Hunt activity will be used to calculate a baseline against which energy savings will be measured.
- After completing the at-home activity, the student is rewarded with a Kit of energy-saving materials that can help the student make real-life connections to the educational content.
- The Kit also contains an activity book for the student with additional information about energy efficiency and the environment, as well as a tip sheet for the Parent/Guardian detailing additional steps the household can take to continue saving energy.

- The installation of the Kit materials leads to energy savings to be claimed by the SoCalREN Residential sector.
- The classroom will receive a financial incentive to support families upon completion of EM&V activity (return of postcard verifying installation of measures).

C. Program Rationale

Due to the COVID-19 pandemic, Residential customers are spending more time than ever at their homes, resulting in higher energy costs (10-15% increases for American consumers[1]). At the same time, many families are facing additional economic hardships due to unemployment—more than 4 million Californians[2] have faced temporary or permanent job loss since Stay at Home orders were announced in March 2020. In addition, Covid-19 has significantly impacted the collected tax revenues for state and local governments which have then severely impacted school district budgets and their subsequent classrooms. As public educational budgets contracts so do the available services and resources.

In addition to all of the economic hardship currently plaguing our economy is climate change. Regardless of the current pandemic, the environment is still incurring significant and detrimental impacts of climate change. Local and regional temperatures are exceedingly increasing at the same time water reserves and precipitation are decreasing setting up severe resiliency issues across the state of California. SoCalREN's Kits for Kids program will not only address the current economic hardships from Covid-19 by helping families during a time when so many are struggling, through the measures provided and installed via Kits for Kids, but it also includes an innovative incentive structure to assist local California classrooms with additional resources and assists in driving real climate action leadership that will grow over the long term thus driving long term energy savings overtime.(youths to adulthood).

1. Market Barriers Addressed

As noted in the Logic Model described in Section 4 of this document, through Kits for Kids, SoCalREN seeks to overcome four key market barriers:

1. Lack of information about energy efficiency within youth and residential sectors.
2. Low engagement by DAC/HTR customers in energy efficiency programs.
3. Lack of energy efficiency installations due to COVID-19 pandemic.
4. Lack of funds to purchase energy efficiency products.

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[1] Forbes, James Conca. (2020). *Expect a Coronavirus Spike in Home Energy Bills This Summer.* https://www.forbes.com/sites/jamesconca/2020/06/30/expect-a-coronavirus-spike-in-home-energy-bills-this-summer/#6a10660327f7

[3] **SoCalREN is assuming 50% of the kits are installed but the realization rate is likely to be higher based on the ME&O strategies deployed to support the program.**

D. Incentive Structure

SoCalREN is proposing an innovative incentive structure that drives energy savings while contributing significantly to the Public Agency school district sub-sector. SoCalREN is proposing in the Kits for Kids program to offer no-cost energy efficient measures to participating student households. In addition, participating school districts school classrooms will be eligible for an incentive classroom grant. If 50% of the students within a given participating classroom install 4 of the 5 measures, their classroom will receive a $500 incentive grant. This incentive structure is similar to the structure that has been in place by the SoCalGas LivingWise program, where grant incentives are offered to participating schools for installations conducted by students.

SoCalREN believes this structure will promote engagement and drive action.

E. Target Market and Served Population

Under this program SoCalREN will target fourth grade students to participate in the Kits For Kids activities. SoCalREN will work with its existing enrolled Public Agency DAC and rural (HTR) school districts who are currently enrolled in the SoCalREN EE PDP program. This will allow for efficiencies across sectors.

F. Program Savings Potential

Table 1 below outlines the potential energy savings per year.

Table 1. Proposed Measures and Energy Savings.

	Quantity	Annual Savings Per Kit	Total Savings Based on 10,000 Kits Installed
LED Bulbs	**2**	**0 kWh***	**0 kWh****
Efficient Showerhead	**1**	**3.4 therms†**	**13,902 Therms**
Faucet Aerators 1 Kitchen 1.5 GPM 1 bath 1.0 GPM	**2**	**3.1 therms†**	**13,380 Therms**
Total kWh		*	**
Total Therms		**6.3 therms**	**40,662 therms**

*39.8 kWh LED savings could be attributable if based on replacing 40W incandescent [3]with 6W LED. SoCalREN will work to collect this attributable date through post-ante EM&V.

** 325,962 kWh LED total program savings could be attributable if based on replacing 40W incandescent with 6W LED. SoCalREN will work to collect this attributable date through post-ante EM&V.

†Based on savings as noted in the 2020 Database for Energy Efficiency Resources (DEER) Workpaper.

[3] **SoCalREN is assuming 50% of the kits are installed but the realization rate is likely to be higher based on the ME&O strategies deployed to support the program.**

G. Eligible Measures and Treatment

The Kits For Kids Program is a resource program whose objective is to promote long-term energy and community benefits through energy efficiency upgrades that result in the reduction of GHG and energy savings. Energy efficient measures identified were measures that would be appropriate for youth understanding of its applicability to achieving savings and that could easily be installed by parent or student under a parent or guardians' supervision.

SoCalREN acknowledges that LED's currently are not claimable for savings however, inclusion of this measure is appropriate given the target population.

CEDARs reported energy savings claimed will be based upon deemed measures in the adopted DEER database and through approved work papers. In addition, and through post-ante data collection, SoCalREN will report in its annual compliance report any savings attributed for measures currently without a deemed workpaper. This additional data could serve useful in future measure assessments or workpaper studies.

Table 2. Measure Treatment by Measure Category

Measures Applicable to the Kits for Kids Program				
End Use	**Measure**	**Intervention Strategy**	**Source Savings**	**Savings Category**
Residential Light	**LED Bulbs**	Not Claimable but will be collected post-ante for future study	N/A	Electric
Residential	**Efficient Showerhead**	Deemed	Work Paper	Therms
Residential	**Faucet Aerators** **1 Kitchen 1.5 GPM** **1 bath 1.0 GPM**	Deemed	Work Paper	Therms

A. Program Budget

SoCalREN is requesting through this advice letter to allocate existing funding authorization under its Business Plan Portfolio funding. SoCalREN provides the estimated Kits for Kids program budget below.

Table 2. Proposed Incentive Budget

	Cost per Kit (DI)	**Total**
Kits for Kids: • **Measures** • **Tip Sheet**	$20	$200,000 (for 10,000 kits)

• **Workbook** • **EM&V Postcard**		
$500 Classroom Incentive Grants		$125,000 (for 250 classrooms)

Table 3. Proposed Program Budget.

Category	**Budget**
Admin	$80,988
Marketing Education & Outreach	$200,000
DINI	$872,341
Incentive	**$325,000**
Total	**$1,478,329**

B. Overarching Theory

The program theory is that, given education about energy efficiency and by providing energy efficiency measures, market barriers preventing households from making EE improvements can be overcome—even during a global pandemic.

Market barriers faced by Residential customers in the SoCalREN service area are addressed through Kits for Kids.

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

Through the implementation of Kits for Kids, SoCalREN expects that, in addition to generating immediate kWh and therm savings, the program can impact long-term behavior both by current

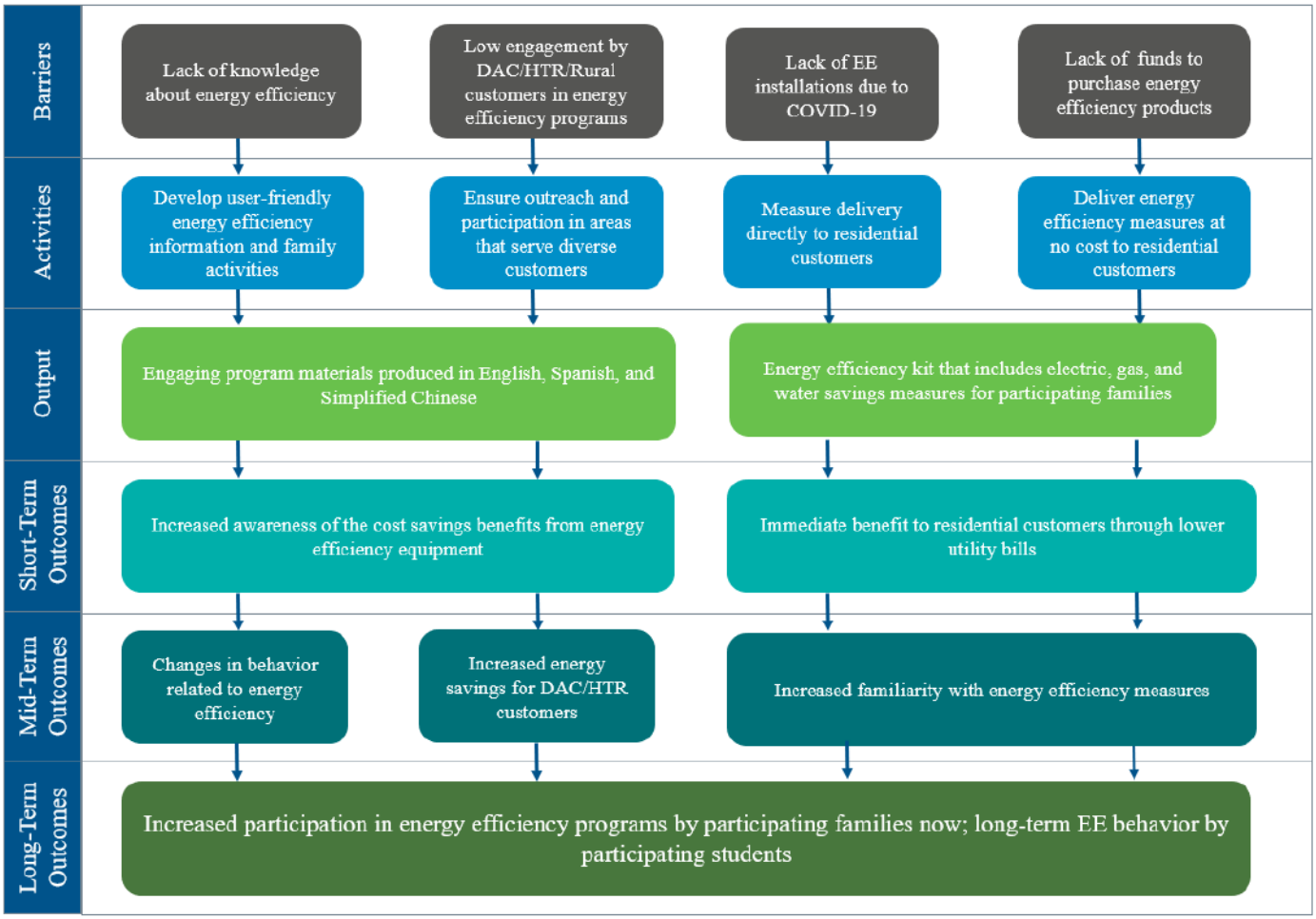
impacted households and the future households of students educated on energy efficiency behaviors through the program.

III. Kits for Kids Logic Model

Details regarding interrelated program activities engaged in by the Program, participating students, and those students' parents/guardians are outline in the logic model shown in Figure 2 below.

The Kits for Kids logic model contains four primary program activities, two outputs, two short-term outcomes, three mid-term outcomes, and one long-term outcome. Activities, outputs, and outcomes are described in further detail following the logic model.

Figure 2. SoCalREN Kits for Kids Logic Model.



A. Barriers

The market barriers addressed by Kits for Kids include 1) the lack of knowledge about energy efficiency among target audiences, 2) low engagement by DAC, HTR, and rural customers in energy efficiency programs, 3) lack of energy efficiency installations due to the COVID-19 pandemic and, 4) lack of funds to purchase energy efficiency products due to the economic hardships households in Southern California face, also due to the COVID-19 pandemic and its impacts on energy costs and employment rates.

B. Activities and Outputs

Develop user friendly energy efficiency information and family activities. A key barrier that the Kits for Kids is trying to overcome is the lack of easy to understand information for the average consumer of household goods. To reach these average consumers, marketing materials must be designed to compete with all other items trying to capture consumer attention on a daily basis. This program surmises that children provide a viable pathway to household decisions and thus designs program materials to reach a school age audience. By centering the program's engagement around a fun activity that involves both the student and the Parent/Guardian, Kits for Kids can make the connection with both the student and the household decision-maker.

Ensure outreach and participation in areas that serve diverse customers. The program's primary interest is to deliver energy savings within HTR/DAC regions including among rural customers. These communities will benefit substantially from energy savings benefits that accrue through the installation of measure installation. This is particularly true given the COVID-19 outbreak as HTR/DAC regions have been impacted more than non-HTR/DACs. The energy savings realized by participants will be more impactful during increased use during quarantine periods.

Engaging program materials produced in English, Spanish, and Simplified Chinese. Given that the program's desire is to deliver energy savings to HTR/DAC customers, program materials will be prepared in multiple languages. Initially, materials will be produced in English, Spanish and Simplified Chinese with additional languages such as Korean and Vietnamese prepared if the need exists.

Measure delivery directly to residential customers. The Kits for Kids Program was conceived to complement the SoCalREN Multifamily Program which primarily works with property owners and contractors. While there are in-unit measures included with that program, the Kits for Kids Program does not require that a property participate in the Multifamily Program and thus can reach other participants. In addition, given the current COVID-19 situation and families quarantined for extended periods, contractors are not able to enter residences and thus the primary measures installed in the Multifamily Program are common area measures that do not directly provide cost savings to tenants.

While this effort was designed to complement the existing SoCalREN Multifamily Program, Kits for Kids will also allow SoCalREN to reach single-family customers with students attending participating schools. While traditional single-family retrofit programs come at a much higher per-installation cost for Program Administrators, Kits for Kids will allow SoCalREN to reach single-family and multifamily customers at the same per measure, per customer cost.

Deliver energy efficiency measures at no cost to residential customers. After completing the at-home activity, the student is rewarded with a Kit of energy-saving materials that can help the student make real-life connections to the educational content. The kits prepared for the Program will include a variety of measures that provide both gas and electric savings. Energy savings will be calculated using the EnergyPro modeling software with information from the at-home activity entered to verify existing conditions. While measures will be selected primarily for their energy savings, certain measures will offer the added benefit of water savings (e.g. faucet aerators and showerheads). This will allow participants to realize reduced cost across all utilities. Kit will include an energy efficiency tip sheet and instructions on how to install all measures.

Customers may not have the financial means to make potentially higher cost energy efficiency purchases and base purchase decisions on low initial product costs, particularly in light of the economic burden households are facing due to the COVID-19 pandemic. In addition, based on the lack of information available to them may not be able to make adequate cost/benefit decisions.

C. Short-Term Outcomes

Increased awareness of the cost savings benefits from energy efficiency equipment. The student activities and energy information provided in the Kit are designed to increase participant awareness of energy efficiency benefits including cost savings and environmental impacts.

Immediate benefits to residential customers through lower utility bills. The measures provided in the kits are selected to save electric, gas and water usage and thus will result in lower utility bills. The kits will include information about the proper usage of measures to increase the likelihood that savings will be achieved.

D. Mid-Term Outcomes

Changes in behavior related to energy efficiency. As a result of information provided through the program, participating families will be better informed of various energy efficiency measures and effective strategies to use those measures in their home. As a result, they will consider energy efficiency options when making purchasing decisions and evaluate the cost/benefit of those decisions.

Increased energy savings for DAC/HTR customers. The in-language content provided by the program will target specific communities who are often overlooked in energy efficiency programs. Providing educational materials, activity sheets, and measure instructions in key languages spoken throughout the region will help more customers directly connect with the content and concepts, and will foster connections between parents/guardians and students who can work on the activities together. These communities will then adopt energy efficiency at a higher level than their historic participation levels.

Increased familiarity with energy efficiency measures. One barrier to adopting energy efficiency measures is the lack of familiarity with such measures. By increasing overall awareness of the various measures available to residential customers, they will become more familiar with the features and benefits of energy efficiency measures and such features will become part of customers normal purchasing behaviors.

E. Long-Term Outcomes

Increased participation in energy efficiency programs. All activities for the Kits for Kids Program are designed to increase customer knowledge and awareness of energy efficiency measures. Customers will be better positioned to identify opportunities within their residence and make appropriate energy efficiency decisions. To maximize their return on investment, customers will participate in energy efficiency programs and apply for rebates/incentives. The long-term goal of increased participation by residential customers in energy efficiency programs will be achieved.

Future participation in EE behaviors and programs. Students who are introduced to energy efficiency concepts at a young age will become informed about the benefits of energy efficiency

behaviors and will carry these concepts and ideas into adulthood when they are making decisions about energy use in their own households.

F. External Influencers

There are many external influences that can have both positive and negative impacts to the Program.

Positive influences that will increase adoption of energy efficiency without program interventions include:

- Reduction in equipment costs that make products more affordable.
- Equipment efficiency standards that increase minimum available efficiencies.
- Property renovations that upgrade residential units and provide updated equipment with higher efficiencies.
- New programs that offer similar measures and/or higher incentives.
- New product offerings that change market dynamics and/or adoption rates of energy efficiency.

Negative influences that can decrease adoption of energy efficiency measures and/or negatively impact program participation include:

- Changes to Federal efficiency standards that impact product availability.
- Tenants move prior to installation and take measures with them.
- Transferring or sale of measures provided in kits.
- Changes in living situation that increases the number of residents within the home.
- Take back effect that results in increased usage of energy efficient equipment.

IV. Market Characterization

A. Specific Technologies

Kits for Kids intends to provide energy efficient measures that are easy for the participating student's parent or guardian to self-install in the home using detailed instructions provided by the Program.

All instructions will be provided in English, Spanish, and Simplified Chinese to ensure understanding by the majority of customers served within the SoCalREN service area. If a particular school or district requests materials in additional languages (e.g. Korean, Vietnamese, etc.) SoCalREN will work to provide those translations.

Since SoCalREN works in partnership with both SCE and SoCalGas and has stated annual energy savings goals for both kWh and therms, the Program seeks to provide measures that generate electric and gas savings.

B. Major Market Participants

End Users: The primary market participant for this program is the student themselves along with their Parent/Guardian and other members of their household. The household will be the recipient

of the energy efficiency measures and will enjoy the cost saving benefits associated with installation and use. The student will benefit from the at-home activity through reinforcement of the concepts taught in school.

Schools/School Districts: Participating elementary schools will enroll in the program, and fourth grade classrooms will be invited to participate in the Kits for Kids Program. Fourth grade was selected because of the standards students are taught at this grade level; they align well with energy efficiency concepts and the at-home activity is intended to build on what has already been taught in the classroom. In addition, existing school-based energy efficiency programs offered by IOUs focus on other grade levels. This home-based energy efficiency education program seeks to reach an additional, discrete student audience.

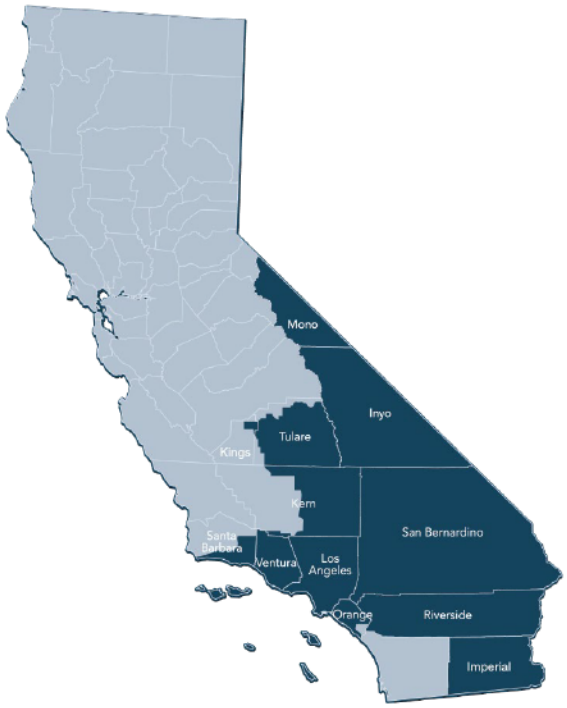
DAC/HTR Communities: The in-language content provided by the program will target specific communities who are often overlooked in energy efficiency programs. Providing educational materials, activity sheets, and measure instructions in key languages spoken throughout the region will help more customers directly connect with the content and concepts, and will foster connections between parents/guardians and students who can work on the activities together. These communities will then adopt energy efficiency at a higher level than their historic participation levels.

V. Geographic Areas

SoCalREN serves a broad geographic area that comprises the areas served by two California Investor-Owned Utilities—SCE and SoCalGas. This territory covers all or part of the following counties:

- Kern
- Imperial
- Inyo
- Los Angeles
- Mono
- Orange
- San Bernardino
- Santa Barbara
- Riverside
- Tulare
- Ventura

Figure 3. SoCalREN Service Area.



Historically, the majority of participation in SoCalREN's residential offerings has been concentrated in portions of Los Angeles County and Orange County, with additional participation in San Bernardino and Riverside Counties.

With Kits for Kids, SoCalREN seeks to expand Residential participation in areas with a lack of historic participation. These areas include DAC and HTR customers, as well as underserved rural customers (i.e. San Joaquin Valley). The selected focus areas are as follows:

- High Sierra/Mammoth Lakes
- San Gabriel Valley
- San Joaquin Valley
- South Bay

SoCalREN plans to achieve outreach goals in these areas through strategic partnerships with local groups working to advance energy efficiency and sustainability initiatives in each area. These organizations have strong relationships with local schools and will help to enroll local districts and schools in SoCalREN and the Kits for Kids program. SoCalREN feels strongly that these local relationships are a key factor in generating local buy-in and success for the Program. The organizations with which SoCalREN will work in partnership to promote Kits for Kids are as follows:

- High Sierra Energy Foundation
- South Bay Cities Council of Governments
- San Gabriel Valley Council of Governments
- San Joaquin Valley Clean Energy Organization

VI. References and Websites

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Attachment E - Advice Letter 12-E/G Attachment A: SoCalREN's HSREEP Program Proposal file don July 7, 2020

Advice No. 12-E-G - Attachment A: HSREE Program Proposal filed on July 7, 2020

Detailed Proposal for SoCalREN's Healthy Stores Refrigeration Energy Efficiency (HSREE) Program

A. HSREE Principles and Program Rationale

Disadvantaged communities are identified by the California Environmental Protection Agency (CalEPA)* as the top 25% most impacted census tracts in CalEnviroScreen 3.0 - a screening tool used to help identify communities disproportionally burdened by multiple sources of pollution and with population characteristics that make them more sensitive to pollution. Low-income communities and households are defined as the census tracts and households, respectively, that are either at or below 80 percent of the statewide median income, or at or below the threshold designated as low-income by the California Department of Housing and Community Development's (HCD).

Alongside these priority populations is the underserved and hard-to-reach market segment of small businesses, specifically small-scale corner stores and grocery stores who serve these priority populations. In many urban areas, and especially those with a large proportion of low-income or minority residents, corner stores are a primary source of food.[1] And although these corner stores do offer food, this food is usually calorie dense and nutrition poor and inundates healthy food choices; thus, creating a food desert.[2]

Within the SoCalREN territory, it is estimated in the County of Los Angeles alone there are approximately 16,000 classified food and beverage retail corner stores as of 2017.[3] And in general it is estimated that 20% of all energy usage can be attributed to these small businesses. If small business were to undertake strategic energy efficiency investments, they could reduce their energy usage and utility costs by 10%-30% annually. By becoming more energy efficient small corner store businesses can be a significant contributor to the reduction in greenhouse gas emission while improving their bottom line and the community around them.

Furthermore and due to recent developments around COVID-19, priority populations within low-income and DACs are significantly relying even more on their local corner stores. With little or no access to large supermarkets or grocers due to the geographical locations of these communities and the cautionary need to reduce and/or avoid use of public transportation to avoid risk of infection, purchasing and consumption of nutrition poor food has significantly increased.

B. General Program Description

[1] CPUC *AB97 Report to the Governor and Legislature: Corner Store Energy Efficiency*. July 2019. p. 13.

[2] The United States Department of Agriculture (USDA) defines a food desert is as "a low-income census tract where either a substantial number or share of residents has low access to a supermarket or large grocery store" (n.d.).

[3] As reported by the California Employment Development Department https://www.labormarketinfo.edd.ca.gov/LMID/Size_of_Business_Data.html

The SoCalREN Healthy Stores Refrigeration Energy Efficiency (HSREE) program will assist funding energy efficient units in corner stores (or their equivalents, such as neighborhood stores, bodegas, convenience stores, or mom and pop stores – all called "corner stores" for purposes of this program) and small businesses in food deserts throughout the region of SoCalREN and its surrounding Counties. The program will offer to this hard-to-reach market segment no-cost energy efficient refrigeration upgrades and will seek to have old in-efficient equipment recycled. Businesses who wish to take advantage of this opportunity will be required to offer healthy food options. The program will work to educate business owners on the financial, energy and community benefits.

To further drive even deeper energy savings within these priority communities, this program will seek to leverage utility partner energy efficient small business programs (i.e., Southern California Edison and Southern California Gas Co. Small Business Direct Install programs) that will couple additional energy efficiency upgrades such as lighting and food service equipment, where applicable per project.

The program will additionally seek out through its utility partner programs "no cost" energy efficiency resources to be offered including:[4]

- Energy audits
- Technical consultation
- Deemed and direct install rebates for efficiency upgrades
- Technical assistance and reviews on projects

The purpose of this program will be to improve access to healthy food choices in the small retail environment for underserved and disadvantaged communities[1] while simultaneously reducing energy usage and greenhouse gas (GHG) emissions.

This program is proposed to be implemented over multiple years, 2020-2022.

C. Program Objectives

The program objectives for the HSREE Program fall into two categories: performance and process. The performance objectives of the HSREE Program are objectives that will be used to assess the performance of the HSREE program to ensure it is meeting expectations and is on a path to succeed. The performance objectives will be carefully tracked and will be reported to the Commission through the SoCalREN annual report so that SoCalREN can ensure that program progress can be conveyed properly. The process objectives are aimed at ensuring a strong infrastructure for program implementation and evaluation to help support the scaling up of the HSREE Program in the future. The program objectives include:

- Address the current challenges that exist within food deserts;
- Reduce GHG emissions while simultaneously promoting options for healthy food options within low income, DACs and food deserts;
- To provide education, outreach and support to "hard-to-reach" small commercial

[4] The original program proposal assumed the availability of SCE's Small Commercial Direct Install program. SCE recently closed the program as of 2020. However, SCE's commercial third-party implementer solicitations will be concluded soon and offerings for technical assistance and or energy audits may once again be available.

businesses regarding energy efficient (EE) upgrades and the benefits for offering healthy food options;

- To assist small commercial businesses overcome common barriers within their EE segment (i.e., lack of awareness and knowledge of EE benefits and how to make use of the utility programs);
- To capture all or most savings potential in one initial transaction; and
- Assess intervention strategies and promote strategies to align financial, energy and community benefits for small commercial owners.

D. Target Market and Served Population

As a local government the SoCalREN has a fiduciary duty to serve hard-to-reach or under-served markets and disadvantaged communities (DACs). Regional government such as the SoCalREN are well-suited to address hard-to-reach markets and DACs through deployment of independent yet parallel programs, initiatives, and actions specifically developed to respond to underserved constituents. The targeted market segment is as follows:

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

Under this program the SoCalREN will target corner stores and or small businesses located throughout the region of SoCalREN and will ***only be eligible*** to properties in low-income neighborhoods and DACs based on the definitions described above.

Table 1. Estimated number of Stores to receive EE Refrigerant Unit Upgrades by year

	2020	2021	2022
Corner stores or Grocery stores	**20**	**35**	**25**

E. Program Savings Potential

As mentioned above, the SoCalREN's proposed HSREE program objectives is not only to improve access to healthy food choices for underserved communities, but to maximize and reduce GHG emissions. Below in Table 2 are potential savings from the estimated number of refrigerant unit upgrades.

Table 2. Estimated Savings Potential and GHG emission reductions, for annual refrigeration unit upgrades

Savings[5] and Reductions[6]	2020	2021	2022
Annual Electric Energy (kWh)	**23,076**	**40,348**	**28,845**
GHG Emissions (metric tons)	**16.3**	**28.5**	**20.4**

Although the numbers in the forecasts above only reflect the savings potential for the refrigerant unit upgrades, it is the SoCalREN's belief with the additional "add-on" services and measures being offered through the utility partner programs (i.e. energy audits) that these savings estimates are relatively low then what could actually be realized. With the additional technical assistance and available energy efficient upgrades that can be completed in small-scale stores or grocery stores, the SoCalREN anticipates an even larger potential for savings.

F. Eligible Measures and Treatment

The HSREE Program is a resource program whose objective is to promote long-term energy and community benefits through energy efficiency upgrades that result in the reduction of GHG and chlorofluorocarbons (CFCs) emissions.

Eligible products must be EnergyStar certified or within California Energy Commission's (CEC) Title 24 energy efficiency compliance standards. In addition, all eligible products must comply with the CDFA's original grant product parameters attached as Appendix A and B. Products that are EnergyStar certified or within energy efficiency Title 24 compliance with the lowest global warming potential (GWP) will be prioritized for refrigerator unit upgrades.

Savings claimed will be based upon deemed measures in the adopted DEER database and through approved work papers.

Table 5. Measure Treatment by Measure Category

Measures Applicable to the HSREE				
End Use	**Measure**	**Intervention Strategy**	**Source Savings**	**Savings Category**
Small Commercial Refrigeration	Qualified Glass door Refrigeration Units	Deemed	Work Paper	Electric
Small Commercial	Qualified Solid door Refrigeration	Deemed	Work Paper	Electric

[5] Estimates based on the assumption of 2 small commercial refrigerant units per project being upgraded with a total of 80 projects being completed over the life of the program.

[6] GHG Emissions estimates are based on United States EPA Greenhouse Gas Equivalency Calculator https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator

Refrigeration	Units			

G. Incentive Structure

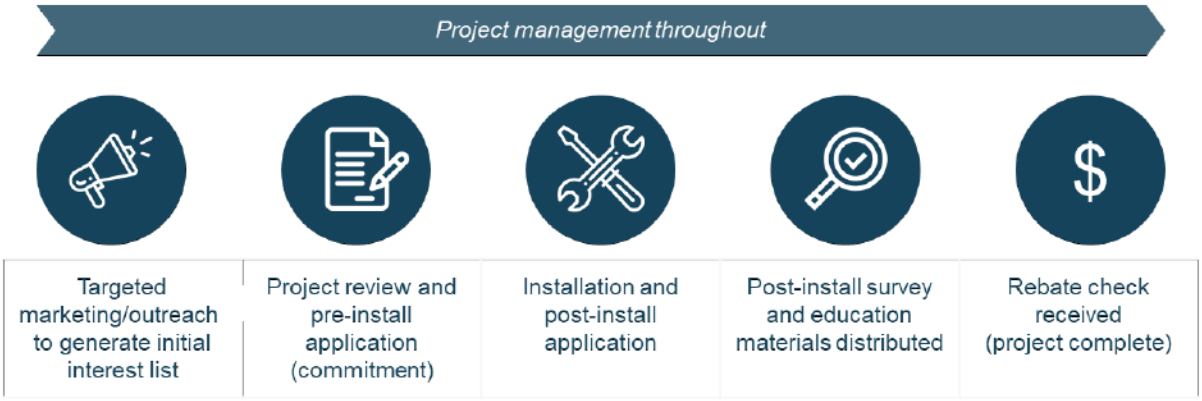
Installations must meet the equipment specifications in order to qualify for a no-cost reimbursement. Terms and Conditions are subject to change without notice. The reimbursement cannot exceed the cost of the product and installation for the project. Costs for equipment and installation will be paid out of CDFA grant funds and pose no burden to ratepayer funds.

H. Program Structure

To successfully implement the HSREE Program, SoCalREN will work with a third-party implementer to perform the initial market assessment and provide a list of targeted customers. The implementer will provide the necessary marketing and outreach materials that will help guide program participants. These materials will be designed to build customer awareness of the community and financial benefits. In collaboration with regional health and food agencies, SoCalREN will advise the implementer about energy and water components to ensure program consistency. Lastly, the implementer will be responsible in identifying opportunities within the IOU existing and potentially new IOU programs to leverage technical assistance on upgrades and conducting energy audits, where available. SoCalREN will conduct an expedited targeted competitive solicitation process to hire a third-party implementer. SoCalREN, in collaboration with the third-party implementer, will be responsible for the overall program design and any modifications needed for the program.

1. Program Process

The following program process outlines at a very high level the customer and program activities that would take place at each stage of typical eligible projects if the proposed SoCalREN HSREE program is approved.



1) MARKETING, EDUCAITON AND OUTREACH – Initial outreach and marketing will be conducted to build relationships and to identify potential applicants. Outreach will emphasize the targeted sub-segments and markets. Educational materials on the benefits of offering healthy food options and energy efficient upgrades will serve as key tools to drive program participation.

2) HSREE PROGRAM APPLICATION – Once a Corner Store or Grocery Store small
    a. business owner (SBO) apply through the HSREE Program, the SBO will be assigned a lead program contact. This contact will assist the SBO in submitting an HSREE application. In addition, the lead program contact will initiate with the SBO's approval engagement of the utility partners so that the SBO can participate in the Southern California Edison (SCE)/SoCalGas small commercial business direct install programs.

3) ***(If available***) ENGERY AUDIT[7] – Once the SBO and program lead have initiated the utility partner programs, an energy audit would be initiated on the SBO's facility. This energy audit will provide the necessary analysis and details for the SBO to make an informative decision on which energy efficiency measures to apply for and which refrigerant units to upgrade.

4) PROJECT EXECUTION – At this point the SBO will be required to either select a contractor on their own or could choose from the available list of qualified contractors offered by the utility partner programs. If the SBO is leveraging the SCE/SoCalGas small commercial business direct install program, installations would be no-cost to the SBO.

5) HSREE PROGRAM INVOICE SUBMITTAL AND PROCESSING – Once installation has occurred the SBO will be eligible to seek invoice reimbursement on the upgraded program qualified refrigerant unit(s).
    a. UTILITY PROGRAM INCENTIVE APPLICATION – In addition and simultaneously, the SBO would also apply for incentives through the IOU programs for any additional category of measures installed.

6) POST-INSTALLATION SURVEY – Once installation has occurred and the SBO's invoice undergoes application processing, the SBO will receive a post-installation survey in which they can provide feedback about the program and indicate outcomes that resulted from the newly installed EE measures.

7) PROJECT CLOSE OUT – The HSREE program lead works with the utility partner to ensure all documentation is received and will work with the SBO to ensure they receive reimbursement for the measures installed.

Please note a more detailed program implementation plan with a detailed logic model would be developed and put in place prior to program launch.

[7] The original program design assumed the availability of SCE's Small Commercial Direct Install program. SCE recently closed the program as of end of year 2019. However, SCE's commercial third-party implementer solicitations will be concluded soon and offerings for technical assistance and or energy audits may once again be available.

2. Customer Eligibility

Customers operating small-scale stores or grocery stores classified as a small business with a Southern California Edison active electric service account and/or a Southern California Gas Company active gas service account.

Small Business Grocer
✓ Independently owned
✓ Less than 100 employees
✓ Avg. gross annual receipts of $15M or less
✓ Authorized to accept EBT/SNAP/CalFresh benefits

Corner Store*
✓ Independent or chain
✓ Small scale store/grocery
✓ Sells food and other essentials in a food desert
✓ Rural, urban, or suburban
**not necessarily located on a street corner!*

Other Customer criteria:

- Located within SoCalREN territory (SCE or SoCalGas customer)
- Located in a food desert
- Hard-To-Reach customer located in a DAC

I. Program Partnerships

When implementing energy efficiency programs, partnerships with stakeholders and market actors are key to achieving performance goals as well as reducing the cost burden on any one program.

1. IOU Coordination

Understanding that the CFDA HSREE grant are limited to the equipment costs of the refrigerant units and a small portion for additional costs (i.e. marketing, etc), the SoCalREN will seek through this program to leverage its utility partners direct install and new third-party implemented small commercial programs, which will offer the expanded services needed by small commercial business owners. SoCalREN will work with Southern California Edison

(SCE) and Southern California Gas Company (SoCalGas) to initiate coordination meetings and communication so that the SoCalREN's HSREE proposed program can work to reach more small commercial business owners and achieve deeper savings per project.

2. Recycling Agency Partner

SoCalREN will work to identify a recycling partner who offers a full array of appliance recycling and change-out services. This partnership will be key to assisting the program in removing old equipment and ensuring that appliance disposal and replacement is conducted in a safe and responsible manner.

J. Market, Education and Outreach Plan

The SoCalREN HSREE proposed program will have marketing and education materials put together that will serve as outreach and education communications tools. These materials will include electronic communications as well as hard-copy materials. Initial contact will be made through targeted outreach, including direct mail, paid media, and community-based outreach organizations and local governments.

- **Informational Materials**
  - Program participant materials
    - Fact sheets
    - Application

- **Educational Materials**
  - In-language materials
  - Web pages on socalren.org
    - Program information
    - Online application
    - Case studies
  - Fact sheets/flyers
  - Decals for store refrigerators
    - Highlighting healthy food options/EE equipment/healthy communities
  - Community giveaways (ex: magnets)
    - Highlighting healthy choices at home

K. Program Budget

SoCalREN is requesting through this advice letter to allocate existing funding authorization under its Business Plan Portfolio funding.[8] SoCalREN provides the estimated HSREE program budget below.

Please note incentives for measure upgrades covered under the program would be paid out of non-ratepayer grant funding. These funds amount to $1,260,000 in CDFA grant funding.

Table 2. Estimated SoCalREN HSREE Program Budget Request

[8] D.18-05-041, p. 105.

		2020	2021	2022	Total
	Administrative Costs	25,000	45,000	45,000	**$115,000**
	Marketing, Education and Outreach Costs	**100,000**	**150,000**	**150,000**	**$400,000**
Direct Implementation	**Incentive Costs**[9]	0	0	0	**0**
	Implementer Costs	125,000	255,000	255,000	**$635,000**
	Proposed Total Initial Program Budget	250,000	450,000	450,000	**$1,150,000**

L. Reporting and Metrics

Similar to the programs within the existing SoCalREN portfolio, the HSREE will be reported monthly, quarterly and annually through CEDARs. In addition to the CPUC required common metrics, the SoCalREN HSREE proposed program will include the collection and tracking of the following data/performance metrics:

- Number of units upgraded
- Number of Savings achieved by type of eligible facility (i.e. corner store, grocer)
- Number of sq. ft per project offering food products
- Number of sq. ft per project offering "healthy food options" (before and after interventions)
- Number of additional energy efficient measure applied per project
- Type of additional add-on energy efficient measures completed
- Number of projects within low-income and DACs
- Number of store owners educated and outreached
- Number of events where HSREE was marketed
- Total amount of funds spent on units
- Estimated non-grant funds spent on project costs
- Program satisfaction survey results

[9] Incentives costs are not included in this budget table. Costs for corresponding equipment and installation will be drawn from the CDF&A grant funds over the life of the program.

Attachment F – SoCalREN *Proposed* Unique Value Metrics

I. Introduction and Background

In 2012, the Commission adopted D.12-11-015 which authorized the piloting of Regional Energy Networks. Within that decision, the Commission allowed for the creation of Regional Energy Networks (RENs) and directed RENs to deliver:

> 1. Activities that utilities cannot or do not intend to undertake
>
> 2. Activities in hard-to-reach markets, whether or not there is a current utility program that may overlap
>
> 3. Activities where there is no current utility program offering, and where there is potential for scalability to a broader geographic reach, if successful

Through this decision's authority the SoCalREN was established in 2012. The Southern California Regional Energy Network's (SoCalREN's) portfolio delivers strategies motivating customers to adopt more comprehensive energy efficiency approaches that are characterized by deeper, longer-lasting savings. Comprehensive EE strategies are essential for California to meet aggressive climate action goals. The California Air Resources Board's (CARB's) Scoping Plan relies on large greenhouse gas (GHG) emissions reductions from EE programs to meet California's GHG emissions reduction mandates set in Assembly Bill (AB) 32. AB 758 authorized the California Energy Commission (CEC) to develop a comprehensive statewide program, in collaboration with the CPUC, to achieve greater EE in all residential and non-residential existing buildings in California. Furthermore, the California Long Term Energy Efficiency Strategic Plan set bold retrofit targets for the existing building stock, including (a) 40 percent consumption reduction in residential dwellings by 2020 and (b) 50 percent of commercial buildings meeting Zero Net Energy (ZNE) by 2030. Senate Bill (SB) 350 requires the state to significantly reduce GHGs, and significantly increase renewable energy resources and existing building energy efficiency by 2030. Other influences that helped shaped SoCalREN's EE business plan include evaluation studies, market trends, customer needs, stakeholder input, and program experience.

Subsequently, the Commission has reaffirmed the value of public agency leadership to meet local needs and priorities while pooling energy management resources in its most recent decision D.19-12-021, which adopted the updated frameworks of Regional Energy Networks.[1] The Commission acknowledged the distinct value of REN's and the unique capacities local governments may bring in the delivery of energy efficiency.[2] In addition to this acknowledgement, the decision also requested that:

> "RENs must state their desired outcome from activities that fill gaps of other program administrators. The RENs shall also propose savings goals and metrics associated with their unique value, as well as a methodology for measuring progress toward their metrics, in their business plans and ABALs."[3]

The following sections within this document describe SoCalREN's unique capacities, its activities that fill gaps of other program administrators, and its proposed methodology for measuring progress toward not only the State's objectives but its mission.

[1] D.19-12-021
[2] Ibid., p. 18.
[3] Ibid., p. 30-31

A. Key Definitions

Benefits – In this document, we define benefits as the additional benefits that accrue to the local communities and program participants because of the SoCalREN activities.

Unique Value – In this document, we define unique value as activities that is either currently not done by overlapping Program administrators or activities that complement and or supplement partner IOU activities.

Leveraged Funds – Funding from outside (non-CPUC) sources to create more holistic activities and/or activities that reach beyond what would be possible with just the CPUC funding source.

Gap-filling – The "gap" refers to the area that includes "activities that utilities cannot or do not intend to undertake."

Value Metrics – Metrics that help demonstrate the value that SoCalREN provides beyond what is captured by the compliance metrics. These are a new type of metric that was developed internally and what will be more finalized once SoCalREN's performs a process evaluation. These proposed metrics include measurements that demonstrate movement towards SoCalREN's core values.

Core Values – The core values refer to the description of SoCalREN's primary value and what might be similarly defined in other organizations "value pillars."

II. SoCalREN's Unique and Core Values

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. The mission of SoCalREN is 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.

The SoCalREN energy efficiency portfolio has since its inception contained key themes to success, and those key themes include partnerships and coordination. The SoCalREN's focus on partnership coordination with its partner IOU Program Administrators, Southern California Edison (SCE) and Southern California Gas (SoCalGas), has been critical to it's success. As part of its focused transition to a performance-based and comparatively cost-effective and cost-efficient 2019 portfolio, the SoCalREN is deepening coordination and exchange with the region's partner Utilities, SCE and SoCalGas. Further, the SoCalREN fundamentally operates in the service of ratepayers, and adds value to property owners by providing information and referrals to programs across all program implementers, including those outside SoCalREN's implementation focus. This requires positive mutual relationships with program implementers across the region. It also requires that the Program Administrators establish clear messaging to differentiate, but also to complement and orchestrate, the suite of available energy management services.

A. Identifying SoCalREN's Unique Value

To accomplish the end goal of determining appropriate metrics in which to measure's SoCalREN unique value proposition, SoCalREN utilized a multi-step approach. First, SoCalREN outlined the Commissions directives. Then mapped out its mission statement as identified in its original Business Plan filing. These first two steps assisted in determining all the various gap filling and unique value-added activities that

the SoCalREN programs provide. Once those were identified clear themes began to present themselves across the portfolio. These subsequently became SoCalREN's core values which were then translated into quantifiable metrics. Figure 1 below visualizes the process that was utilized, and Figure 2 outlines the gap filling value added activities identified which lead to the determination of SoCalREN's unique core values.

Figure 1. SoCalREN's Unique Value Metric Identification Process

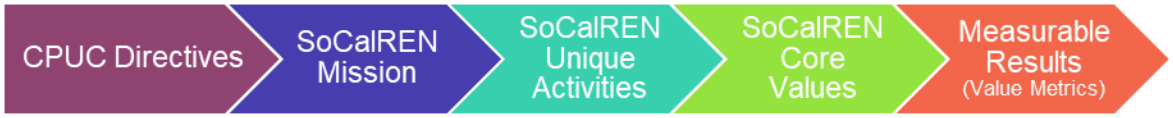
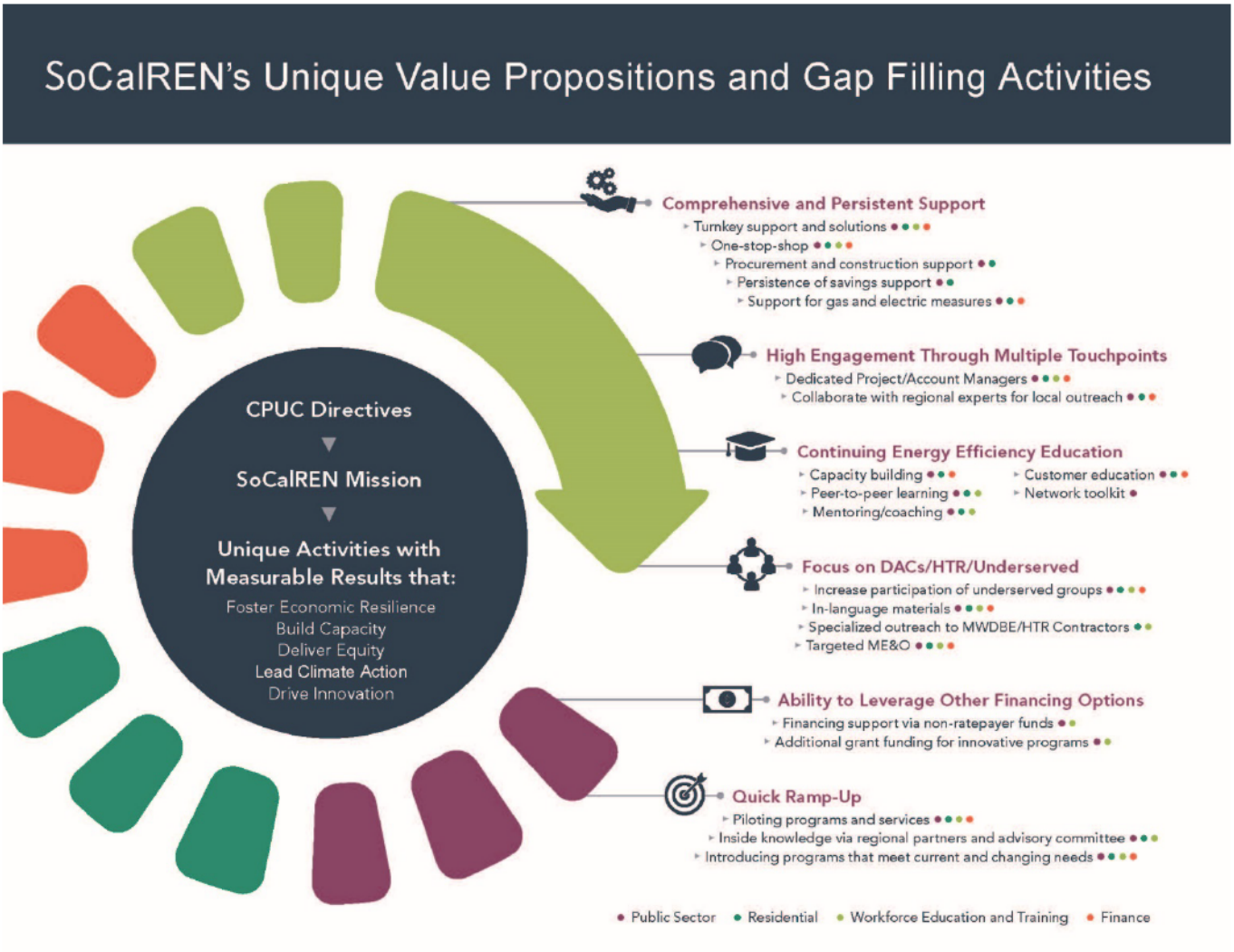


Figure 2. SoCalREN's Unique Value Proposition: Gap Filling Activities



B. SoCalREN's Core Values

After identifying the unique value propositions and the many gap-filling activities, clear themes presented themselves that arched over the portfolio across all sectors. These being identified as SoCalREN's core values. SoCalREN's core values help meet the state's objectives at the regional level through the activities supported within each category. SoCalREN's proposed value metrics provide the measurable results that give each value the construct to meeting the states objectives and Commission's goals for REN's. Figure 3 outlines SoCalREN's core values and Figure 4 provides the context in which each sector contributes to each core value.

Figure 3. SoCalREN Core Values

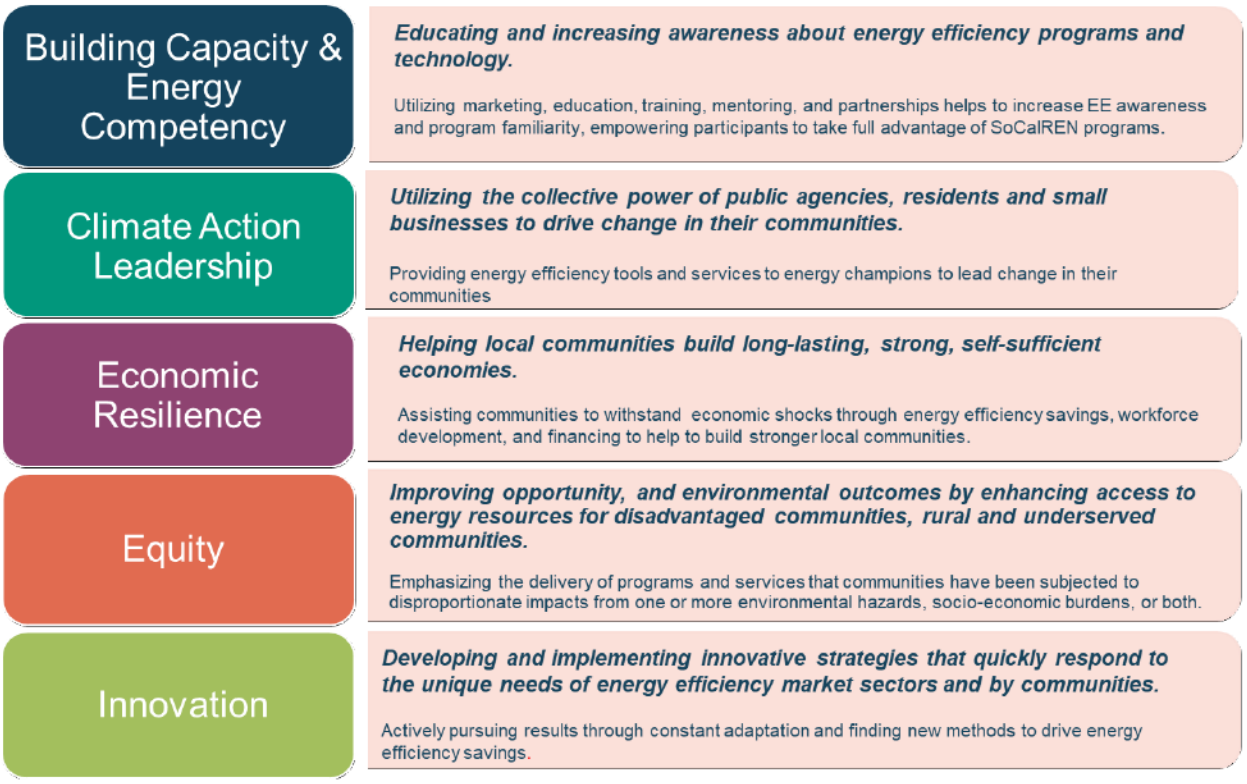


Figure 4. SoCalREN Core Value Benefits

Overarching Goal:	Energy and Environmental Impacts				
Core Values:	**Economic Resilience**	**Capacity Building**	**Climate Action Leadership**	**Equity**	**Innovation**
Definition	*Helping local communities build long-lasting, strong, self-sufficient economies.*	*Educating and increasing awareness about energy efficiency programs and technology.*	*Utilizing the collective power of public agencies, residents and small businesses to drive change in their communities.*	*Improving opportunity, and environmental outcomes by enhancing access to energy resources for disadvantaged communities, rural and underserved communities.*	*Developing and implementing innovative strategies that quickly respond to the unique needs of energy efficiency market sectors and by communities.*
Portfolio	**Assisting communities to withstand economic shocks through energy efficiency savings, workforce development, and financing to help to build stronger local communities.**	**Utilizing marketing, education, training, mentoring, and partnerships helps to increase EE awareness and program familiarity, empowering participants to take full advantage of SoCalREN programs.**	**Providing energy efficiency tools and services to energy champions to lead change in their communities.**	**Emphasizing the delivery of programs and services that communities have been subjected to disproportionate impacts from one or more environmental hazards, socio-economic burdens, or both.**	**Actively pursuing results through constant adaptation and finding new methods to drive energy efficiency savings.**
Public Sector	Creating long-term energy savings, community benefits, and jobs for public agencies	Educating agencies and contractors to create a culture of energy competency	Identifying LG Energy champions and providing the necessary tools and services to accomplish local EE goals.	Leveraging public agencies as ambassadors for EE in under-resourced, HTR communities	Promoting innovative strategies and technologies to bolster EE leadership by local governments
Residential	Feeding the green economy through energy savings and capital for EE improvements	Increasing awareness and guiding contractors and customers in leveraging EE programs	Leveraging LG leaders to enact change in local residents and small business owners	Funneling public investment to positively impact customers and contractors in historically marginalized groups	Responding quickly to market shifts to maximize benefits for residents and contractors
Workforce Education and Training	Building a robust and diverse EE workforce through strategic partnerships that drive growth in local, diverse communities	Developing pathways for high school students and transition age youth to pursue careers in EE	Driving knowledge to lead change through the implementation of projects by contractors.	Focusing program recruitment, training, and education to benefit diverse youth and contractor companies	Championing new ideas for recruiting, retention, and success to bring new participants into the green economy
Financing	Driving investment in EE improvements with low-interest financing offerings	Educating customers and contractors about smart EE investment strategies to maximize ROI	Providing the necessary tools or products that can be leveraged by energy champions to accomplish EE goals.	Alleviating funding barriers to support EE investment and benefits in underserved areas	Providing tools for tailored solutions to improve customer understanding of EE as a positive investment

C. Next Steps

The proposed value metrics included in this document are just the preliminary step in identifying SoCalREN's true value propositions and the unique capacities. Similar to BayREN's "2019 Process Evaluation Study, 2020", SoCalREN is seeking to conduct a process evaluation study that seeks to perform a cross-cutting process evaluation of its entire portfolio. The study will help SoCalREN understand how it can improve program coordination, provide more effective delivery of services, and maximize outcomes and customer benefits. A portfolio-level evaluation will provide cost efficiencies and allow for more robust analysis. In addition, SoCalREN will utilize this study to fine-tune and improve on this preliminary step which may include revising the proposed metrics and or core values.

SoCalREN's continues to optimize its portfolio and to meet the Commission objectives for REN's. The next steps including the SoCalREN process evaluation study will ensure that SoCalREN continues to improve overtime.

III. SoCalREN's ABAL Proposed Value Metrics

In this section, the SoCalREN presents its proposed value metrics that quantifiably measure the progress and support of meeting its overall goals and core values. The value metrics provided in this document are the quantifiable measurements of each SoCalREN core value categories that demonstrate SoCalREN's impacts to reduce GHG emissions and increase energy savings. Each metric is a measurement, intended to directly speak to the value that SoCalREN provides to the State and the communities it serves.

SoCalREN is proposing value metrics for each sector regarding each category as well as portfolio value metrics that are represented within each sector thus are applicable ren-wide (portfolio wide). The proposed value metrics by sector provide a bottom up approach in assessing (1) the progress each sector's programs are contributing to the overall mission/objectives of SoCalREN; and (2) reveal the unique value each sector's programs contain. Through this exercise SoCalREN quickly identified that even at the program level there were unique characteristics that are not necessarily quantifiable ren-wide however, are significantly impactful and thus are key to demonstrating the unique value and benefit of that SoCalREN sector program.

Since these metrics have not been formally reported in prior years, SoCalREN intends to utilize 2020 as a baseline year (a year to collect 12 months' worth of data). Once 2020 program year data is finalized and reported, SoCalREN will work to develop targets for the near, mid and long-term future. First year baseline will be included in SoCalREN's 2019 Annual Compliance Report. SoCalREN aims to have targets established and included in either the next ABAL or Business Plan filing (whichever may occur first).

Included below in summary are SoCalREN's proposed value metrics at the portfolio level. Sector unique value metrics have also been identified which will gage the measurable progress of each sector program and are being proposed but due to the long list are not included in this document. Instead, they can be found in the SoCalREN's 2021 ABAL Budgetary Appendix under the tab titled " SCR UVM" (please note there are multiple tabs that support the summary SCR UVM tab).

In addition, and included in this section are tables for each portfolio value metric that provides the proposed additional details of information that SoCalREN will collect to provide context to the quantitative value. This includes the methodology, data source, unit and where on the above SoCalREN value metric dashboard it can be found (reference #).

Table 1. SoCalREN Core Value - *Building Capacity & Energy Competency* *(proposed portfolio value metrics)*

Building Capacity & Energy Competency			
Sector	**Core Value**	**Metric**	**Methodology**
RES, PUB, WE&T	Building Capacity & Energy Competency - Teaching participants about EE helps build their capacity to successfully promote and install energy efficiency improvements	Percent of program participants indicating an increase in EE Knowledge	% of contractors/staff/participants surveyed who indicated the program increased their knowledge of energy efficiency
RES, PUB,	Building Capacity & Energy Competency - Increasing	Industry Engagement - # of outreach, education,	# of events completed

WE&T, COM	awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community	and training events completed	
RES, PUB, WE&T, COM	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community	Industry Engagement - # of outreach, education, and training participants served	# of participants
RES, PUB, WE&T, COM	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community	Educational Materials - # of unique educational materials produced	# of unique educational produced
RES, PUB, COM	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community	Educational Materials - # of unique in-language educational materials produced	# of unique in-language educational produced
RES, PUB, WE&T, COM	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community	Training and Education - # of training hours	total # of training hours completed by program participants
RES, PUB, COM	Building Capacity & Energy Competency - Careful guidance to help participants navigate programs helps build their capacity to successfully complete EE projects	Training and Education - # of hours of mentoring	total # of mentoring hours delivered to program participants
REN-WIDE	Building Capacity & Energy Competency - Increasing awareness about EE benefits	Paid Media Metrics - # of digital impressions	# of impressions

	and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community		
REN-WIDE	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community	Paid Media Metrics - click-through rate (CTR)	% Click-Through Rate (CTR)
REN-WIDE	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community	Paid Media Metrics - # of direct mail pieces distributed	# of direct mail pieces distributed
REN-WIDE	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community	Paid Media Metrics - # of print advertising impressions	# of impressions
REN-WIDE	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community	Earned Media - # of Social Media Engagements	# of engagements
REN-WIDE	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community	Earned Media - # of digital impressions (Website)	# of impressions

Table 2. SoCalREN Core Value – *Climate Action Leadership* *(proposed portfolio value metrics)*

Climate Action Leadership			
Sector	**Core Value**	**Metric**	**Methodology**
RES, PUB, COM	Climate Action Leadership - Ensure delivery of cost-effective savings	Cost Efficiency - Implementation budget/kBtuh Saved	Total DI-NI Costs/net kBtuh
RES, PUB, COM	Climate Action Leadership - Ensure delivery of cost-effective savings	Cost Efficiency - Admin budget/kBtuh Saved	Total Admin Costs/net kBtuh
RES, PUB, COM	Climate Action Leadership - GHG reductions support CA state climate goals	# GHG emission reductions	MT CO2e (Annual Net kWh) + MT CO2e (Annual Net Therms)
RES, PUB, COM	Climate Action Leadership - Promoting vast program participation	# of completed projects	# of completed projects across sectors
RES, PUB, WE&T, COM	Climate Action Leadership - Promoting vast program participation	# of program participants	# of program participants across sectors
RES, PUB, COM	Climate Action Leadership - Lifetime energy savings, supporting long term climate and energy goals	# of lifetime kWh Saved	# of lifetime kWh Saved across sectors
RES, PUB, COM	Climate Action Leadership - Lifetime energy savings, supporting long term climate and energy goals	# of lifetime kW Saved	# of lifetime kW Saved across sectors
RES, PUB, COM	Climate Action Leadership - Lifetime energy savings, supporting long term climate and energy goals	# of lifetime therm	# of lifetime therm Saved across sectors
RES, PUB, COM	Climate Action Leadership - Annual energy savings, supporting long term climate and energy goals	# of annual energy savings (BTUs)	# of annual energy savings (BTUs)
PUB	Climate Action Leadership - Investments in DERs directly supports achievement of CA energy and climate goals	# of DERs installed	# of DERs installed
PUB	Climate Action Leadership - Investments in DERs directly supports achievement of CA energy and climate goals	Total dollars invested in DER strategies	total dollars invested in DER strategies by public agency participants

PUB	Climate Action Leadership - Investments in DERs directly supports achievement of CA energy and climate goals	Percent of DERs recommendations adopted	# of DERs installed by agencies/# of DERs recommended to agencies
RES, PUB, COM	Climate Action Leadership - Support identification and installation of comprehensive energy savings opportunities	Percent of recommended energy efficiency measures completed at participating properties/facilities	# of EE measures installed by participants/# of EE measures recommended to participants
RES, PUB, COM	Climate Action Leadership - Support identification and installation of comprehensive energy savings opportunities	Percent of recommended energy savings completed at participating properties/facilities (kWh)	Installed Net kWh Savings/Recommended Net kWh Savings
RES, PUB, COM	Climate Action Leadership - Support identification and installation of comprehensive energy savings opportunities	Percent of recommended energy savings completed at participating properties/facilities (kW)	Installed Net kW Savings/Recommended Net kW Savings
RES, PUB, COM	Climate Action Leadership - Support identification and installation of comprehensive energy savings opportunities	Percent of recommended energy savings completed at participating properties/facilities (therm)	Installed Net therm Savings/Recommended Net therm Savings
RES, PUB, WE&T	Climate Action Leadership - Maintaining high customer satisfaction encourages future participation in EE programs	Percent of participants satisfied with program	# of participants who indicate satisfaction with the program via program survey/total # of participants who responded to program survey
RES, PUB	Climate Action Leadership - Depth of energy savings interventions contributes to ZNE and other climate and energy goals	Percent energy savings achieved by program participants (gross kWh, kW, therm)	Sum of gross kWh, kW, therm savings across projects/sum of baseline gross kWh, kW, therm savings across projects
RES, PUB	Climate Action Leadership - Depth of energy savings interventions contributes to ZNE and other climate and energy goals	Percent energy savings achieved by program participants (net kWh, kW, therm)	Sum of net kWh, kW, therm savings across projects/sum of baseline net kWh, kW, therm savings across projects

Table 3. SoCalREN Core Value – *Economic Resilience* *(proposed portfolio value metrics)*

Economic Resilience			
Sector	**Core Value**	**Metric**	**Methodology**
RES, PUB, COM	Economic Resilience - Outside funding resources reduce economic burdens on program	Total project costs supported by non-ratepayer funding	Total costs of completed projects that leveraged non-ratepayer funding

	participants and expand the reach of the SoCalREN programs		
RES, PUB	Economic Resilience - Total annual dollar savings for completed energy projects and dollars that can be reinvested into communities	Average utility bill savings per project	Estimated annual utility bill costs/total # of projects
RES, PUB, COM	Economic Resilience - More investment in energy savings for disadvantaged communities/low-income communities/hard-to-reach customers ensure more equitable distribution of funds	Energy efficiency resources invested in Disadvantaged Communities/Low-Income communities/Hard-to-Reach customers	total budget (includes admin, direct implementation, marketing, and incentive costs) utilized to support projects and/or provide services to Disadvantaged Communities/Low-Income communities/hard-to-reach customers
RES, PUB, COM	Economic Resilience - Investments in energy projects support economies in local communities	# of construction jobs supported	total value of projects supported through programs/$92,000 (Based on ARRA guidance to agencies on estimating job-years from government spending, it is estimated that 1 construction job is supported for every $92,000 construction dollars spent.)
RES, PUB	Economic Resilience - Promoting vast program participation and promoting competition in the local market	# of contractors actively participating in programs	# of contractors who have completed projects in the program in the current program year

Table 4. SoCalREN Core Value – *Equity* *(proposed portfolio value metrics)*

Equity			
Sector	**Core Value**	**Metric**	**Methodology**
RES, PUB, WE&T, COM	Equity - More investment in energy savings for DACs helps ensure more equitable distribution of funds	Percent of participants in Disadvantaged Communities	total # of participants from DACs/total # of participants
RES, PUB, WE&T, COM	Equity - More investment in energy savings for low-income communities helps ensure more equitable distribution of funds	Percent of participants in Low-Income Communities	total # of participants from low-income communities/total # of participants

RES, PUB	Equity - More investment in energy savings for DACs helps ensure more equitable distribution of funds	Incentive Dollars Invested in Disadvantaged Communities	total incentive dollars disbursed to participants with completed projects in disadvantaged communities
RES, PUB, WE&T	Equity - Total GHG reduction in DACs support CA state climate goals	# of GHG emission reductions in Disadvantaged Communities	MT CO2e (Annual Net kWh) + MT CO2e (Annual Net Therms)
RES, PUB, COM	Equity - More investment in energy savings for DACs helps ensure more equitable distribution of funds	Percent of projects completed in Disadvantaged Communities	# of projects completed in DACs/total # of projects completed
RES, WE&T, COM	Equity - More investment in energy savings for participants who primarily speak another language other than English ensure more equitable distribution of funds	Percent of program participants primarily speaking a language other than English	total # of program participants primarily speaking a language other than English/total # of program participants
RES, PUB, WE&T, COM	Equity - Ensure program services are spread equitably across the region	# of unique ZIP codes served	# of unique ZIP codes served
RES, PUB, COM	Equity - Ensure program services are spread equitably across the region	Percent of rural/HTR/underserved areas served	# of projects completed in rural/HTR/underserved areas/total # of projects
RES, PUB, COM	Equity - Ensure program services are spread equitably across the region	Percent of relative participation by County (Net kWh, kW, therm)	Annual Net kWh, kW, therm completed/Total Annual Net kWh, kW, therm

Table 5. SoCalREN Core Value – *Innovation* *(proposed portfolio value metrics)*

Innovation			
Sector	**Core Value**	**Metric**	**Methodology**
RES, PUB, WE&T, COM	Innovation - Introduce programs and services to meet the unique barriers faced by participants	# of unique strategies delivered	# of unique strategies delivered to program participants
RES, PUB, WE&T, COM	Innovation - Introduce programs and services to meet the unique barriers faced by participants	# of unique program or subprogram ideas introduced and implemented	# of unique program or subprogram ideas introduced and implemented
RES, PUB, WE&T	Innovation - Encourages participants to explore and adopt a variety of EE technologies	# of emerging/innovative technologies promoted	# of emerging/innovative technologies promoted

RES, PUB, COM	Innovation - Support identification and installation of comprehensive energy savings opportunities	# of unique electric measures recommended and installed	# of unique electric measures recommended and installed
RES, PUB, COM	Innovation - Support identification and installation of comprehensive energy savings opportunities	# of unique gas measures recommended and installed	# of unique gas measures recommended and installed

Appendix - REN-Wide Portfolio Metric Details Tables

Metric	Percent of program participants indicating an increase in EE Knowledge
Reference #	1
Numerator	N/A
Denominator	N/A
Reported	% of contractors/staff/participants surveyed who indicated the program increased their knowledge of energy efficiency
Unit	%
Methodology	% of contractors/staff/participants surveyed who indicated the program increased their knowledge of energy efficiency
Data Source	Participant survey results from sector programs
Core Value	Building Capacity & Energy Competency - Teaching participants about EE helps build their capacity to successfully promote and install energy efficiency improvements
Applicable Sectors	RES, PUB, WE&T

Metric	Industry Engagement - # of outreach, education, and training events completed
Reference #	2
Numerator	N/A
Denominator	N/A
Reported	# of events completed
Unit	#
Methodology	# of events completed
Data Source	SoCalREN Databases
Core Value	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community
Applicable Sectors	RES, PUB, WE&T, COM

Metric	Industry Engagement - # of outreach, education, and training participants served
Reference #	3
Numerator	N/A
Denominator	N/A
Reported	# of participants
Unit	#
Methodology	# of participants
Data Source	SoCalREN Database
Core Value	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community
Applicable Sectors	RES, PUB, WE&T, COM

Metric	Educational Materials - # of unique educational materials produced
Reference #	4
Numerator	N/A
Denominator	N/A

Reported	# of unique educational produced
Unit	#
Methodology	# of unique educational produced
Data Source	SoCalREN Databases
Core Value	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community
Applicable Sectors	RES, PUB, WE&T, COM

Metric	Educational Materials - # of unique in-language educational materials produced
Reference #	5
Numerator	N/A
Denominator	N/A
Reported	# of unique in-language educational produced
Unit	#
Methodology	# of unique in-language educational produced
Data Source	SoCalREN Databases
Core Value	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community
Applicable Sectors	RES, PUB, COM

Metric	Training and Education - # of training hours
Reference #	6
Numerator	N/A
Denominator	N/A
Reported	total # of training hours completed by program participants
Unit	#
Methodology	total # of training hours completed by program participants
Data Source	SoCalREN Databases
Core Value	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community
Applicable Sectors	RES, PUB, WE&T, COM

Metric	Training and Education - # of hours of mentoring
Reference #	7
Numerator	N/A
Denominator	N/A
Reported	total # of mentoring hours delivered to program participants
Unit	#
Methodology	total # of mentoring hours delivered to program participants
Data Source	SoCalREN Databases
Core Value	Building Capacity & Energy Competency - Careful guidance to help participants navigate programs helps build their capacity to successfully complete EE projects
Applicable Sectors	RES, PUB, COM

Metric	Paid Media Metrics - # of digital impressions
Reference #	8

Numerator	N/A
Denominator	N/A
Reported	# of impressions
Unit	#
Methodology	# of impressions
Data Source	SoCalREN Databases
Core Value	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community
Applicable Sectors	REN-WIDE

Metric	Paid Media Metrics - click-through rate (CTR)
Reference #	9
Numerator	N/A
Denominator	N/A
Reported	Reported
Unit	%
Methodology	% Click-Through Rate (CTR)
Data Source	Media Vendors (Google, Bing, LinkedIn, etc.)
Core Value	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community
Applicable Sectors	REN-WIDE

Metric	Paid Media Metrics - # of direct mail pieces distributed
Reference #	10
Numerator	N/A
Denominator	N/A
Reported	Direct mail pieces
Unit	#
Methodology	# of direct mail pieces distributed
Data Source	Direct Mail Vendor
Core Value	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community
Applicable Sectors	REN-WIDE

Metric	Paid Media Metrics - # of print advertising impressions
Reference #	11
Numerator	N/A
Denominator	N/A
Reported	# of impressions
Unit	#
Methodology	# of impressions
Data Source	SoCalREN Databases
Core Value	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community
Applicable Sectors	REN-WIDE

Metric	Earned Media - # of Social Media Engagements

Reference #	12
Numerator	N/A
Denominator	N/A
Reported	# of engagements
Unit	#
Methodology	# of engagements
Data Source	Publications, Circulation Data
Core Value	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community
Applicable Sectors	REN-WIDE

Metric	Earned Media - # of digital impressions (Website)
Reference #	13
Numerator	N/A
Denominator	N/A
Reported	# of impressions
Unit	#
Methodology	# of impressions
Data Source	Facebook, Instagram, Twitter, LinkedIn
Core Value	Building Capacity & Energy Competency - Increasing awareness about EE benefits and programs helps build capacity of participants to take advantage of EE opportunities and become leaders in EE in their community
Applicable Sectors	REN-WIDE

Metric	Cost Efficiency - Implementation budget/kBtuh Saved
Reference #	14
Numerator	N/A
Denominator	N/A
Reported	$/Net KBtuh
Unit	$/Net KBtuh
Methodology	Total DI-NI Costs/net kBtuh
Data Source	SoCalREN Databases and Budget Tracker
Core Value	Climate Action Leadership - Ensure delivery of cost-effective savings
Applicable Sectors	RES, PUB, COM

Metric	Cost Efficiency - Admin budget/kBtuh Saved
Reference #	15
Numerator	N/A
Denominator	N/A
Reported	$/Net KBtuh
Unit	$/Net KBtuh
Methodology	Total Admin Costs/net kBtuh
Data Source	SoCalREN Databases and Budget Tracker
Core Value	Climate Action Leadership - Ensure delivery of cost-effective savings
Applicable Sectors	RES, PUB, COM

Metric	# GHG emission reductions
Reference #	16
Numerator	N/A
Denominator	N/A

Reported	Metric tons
Unit	Metric tons
Methodology	MT CO2e (Annual Net kWh) + MT CO2e (Annual Net Therms)
Data Source	CET
Core Value	Climate Action Leadership - GHG reductions support CA state climate goals
Applicable Sectors	RES, PUB, COM

Metric	# of completed projects
Reference #	17
Numerator	N/A
Denominator	N/A
Reported	# of completed projects
Unit	#
Methodology	# of completed projects across sectors
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Promoting vast program participation
Applicable Sectors	RES, PUB, COM

Metric	# of program participants
Reference #	18
Numerator	N/A
Denominator	N/A
Reported	# of program participants
Unit	#
Methodology	# of program participants across sectors
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Promoting vast program participation
Applicable Sectors	RES, PUB, WE&T, COM

Metric	# of lifetime kWh Saved
Reference #	19
Numerator	N/A
Denominator	N/A
Reported	kWh
Unit	kWh
Methodology	# of lifetime kWh Saved across sectors
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Lifetime energy savings, supporting long term climate and energy goals
Applicable Sectors	RES, PUB, COM

Metric	# of lifetime kW Saved
Reference #	20
Numerator	N/A
Denominator	N/A
Reported	kW
Unit	kW
Methodology	# of lifetime kW Saved across sectors
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Lifetime energy savings, supporting long term climate and energy goals

Applicable Sectors	RES, PUB, COM

Metric	# of lifetime therm
Reference #	21
Numerator	N/A
Denominator	N/A
Reported	therm
Unit	therm
Methodology	# of lifetime therm Saved across sectors
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Lifetime energy savings, supporting long term climate and energy goals
Applicable Sectors	RES, PUB, COM

Metric	# of annual energy savings (BTUs)
Reference #	22
Numerator	N/A
Denominator	N/A
Reported	BTUs
Unit	BTUs
Methodology	# of annual energy savings (BTUs)
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Annual energy savings, supporting long term climate and energy goals
Applicable Sectors	RES, PUB, COM

Metric	# of DERs installed
Reference #	23
Numerator	N/A
Denominator	N/A
Reported	# of DERs installed
Unit	#
Methodology	# of DERs installed
Data Source	Salesforce
Core Value	Climate Action Leadership - Investments in DERs directly supports achievement of CA energy and climate goals
Applicable Sectors	PUB

Metric	Total dollars invested in DER strategies
Reference #	24
Numerator	N/A
Denominator	N/A
Reported	dollars
Unit	$
Methodology	total dollars invested in DER strategies by public agency participants
Data Source	Salesforce
Core Value	Climate Action Leadership - Investments in DERs directly supports achievement of CA energy and climate goals
Applicable Sectors	PUB

Metric	Percent of DERs recommendations adopted
Reference #	25
Numerator	# of DERs installed by agencies
Denominator	# of DERs recommended to agencies
Reported	DERs
Unit	%
Methodology	# of DERs installed by agencies/# of DERs recommended to agencies
Data Source	Salesforce
Core Value	Climate Action Leadership - Investments in DERs directly supports achievement of CA energy and climate goals
Applicable Sectors	PUB

Metric	Percent of recommended energy efficiency measures completed at participating properties/facilities
Reference #	26
Numerator	# of EE measures installed by participants
Denominator	# of EE measures recommended to participants
Reported	EE measures
Unit	%
Methodology	# of EE measures installed by participants/# of EE measures recommended to participants
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Support identification and installation of comprehensive energy savings opportunities
Applicable Sectors	RES, PUB, COM

Metric	Percent of recommended energy savings completed at participating properties/facilities (kWh)
Reference #	27
Numerator	Installed Net kWh Savings
Denominator	Recommended Net kWh Savings
Reported	Net kWh Savings
Unit	%
Methodology	Installed Net kWh Savings/Recommended Net kWh Savings
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Support identification and installation of comprehensive energy savings opportunities
Applicable Sectors	RES, PUB, COM

Metric	Percent of recommended energy savings completed at participating properties/facilities (kW)
Reference #	28
Numerator	Installed Net kW Savings
Denominator	Recommended Net kW Savings
Reported	Net kW Savings
Unit	%
Methodology	Installed Net kW Savings/Recommended Net kW Savings
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Support identification and installation of comprehensive energy savings opportunities
Applicable Sectors	RES, PUB, COM

Metric	Percent of recommended energy savings completed at participating properties/facilities (therm)
Reference #	29
Numerator	Installed Net therm Savings
Denominator	Recommended Net therm Savings
Reported	Net therm Savings
Unit	%
Methodology	Installed Net therm Savings/Recommended Net therm Savings
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Support identification and installation of comprehensive energy savings opportunities
Applicable Sectors	RES, PUB, COM

Metric	Percent of participants satisfied with program
Reference #	30
Numerator	# of participants who indicate satisfaction with the program via program survey
Denominator	total # of participants who responded to program survey
Reported	participants
Unit	%
Methodology	# of participants who indicate satisfaction with the program via program survey/total # of participants who responded to program survey
Data Source	Participant survey results from sector programs
Core Value	Climate Action Leadership - Maintaining high customer satisfaction encourages future participation in EE programs
Applicable Sectors	RES, PUB, WE&T

Metric	Percent energy savings achieved by program participants (gross kWh)
Reference #	31
Numerator	Sum of gross kWh savings across projects
Denominator	Sum of baseline gross kWh savings across projects
Reported	kWh
Unit	%
Methodology	Sum of gross kWh savings across projects/sum of baseline gross kWh savings across projects
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Depth of energy savings interventions contributes to ZNE and other climate and energy goals
Applicable Sectors	RES, PUB

Metric	Percent of energy savings achieved by program participants (net kWh)
Reference #	32
Numerator	Sum of net kWh savings across projects
Denominator	Sum of baseline net kWh savings across projects
Reported	kWh
Unit	%
Methodology	Sum of net kWh savings across projects/sum of baseline net kWh savings across projects
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Depth of energy savings interventions contributes to ZNE and other climate and energy goals
Applicable Sectors	RES, PUB

Metric	Percent of energy savings achieved by program participants (gross kW)
Reference #	33
Numerator	Sum of gross kW savings across projects
Denominator	Sum of baseline gross kW savings across projects
Reported	kW
Unit	%
Methodology	Sum of gross kW savings across projects/sum of baseline gross kW savings across projects
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Depth of energy savings interventions contributes to ZNE and other climate and energy goals
Applicable Sectors	RES, PUB

Metric	Percent of energy savings achieved by program participants (net kW)
Reference #	34
Numerator	Sum of net kW savings across projects
Denominator	Sum of baseline net kW savings across projects
Reported	kW
Unit	%
Methodology	Sum of net kW savings across projects/sum of baseline net kW savings across projects
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Depth of energy savings interventions contributes to ZNE and other climate and energy goals
Applicable Sectors	RES, PUB

Metric	Percent of energy savings achieved by program participants (gross therm)
Reference #	35
Numerator	Sum of gross therm savings across projects
Denominator	Sum of baseline gross therm savings across projects
Reported	kW
Unit	%
Methodology	Sum of gross therm savings across projects/sum of baseline gross therm savings across projects
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Depth of energy savings interventions contributes to ZNE and other climate and energy goals
Applicable Sectors	RES, PUB

Metric	Percent of energy savings achieved by program participants (net therm)
Reference #	36
Numerator	Sum of net therm savings across projects
Denominator	Sum of baseline net therm savings across projects
Reported	kW
Unit	%
Methodology	Sum of gross net savings across projects/sum of baseline net therm savings across projects
Data Source	SoCalREN Databases
Core Value	Climate Action Leadership - Depth of energy savings interventions contributes to ZNE and other climate and energy goals
Applicable Sectors	RES, PUB

Metric	# of projects supported by non-rate payer funding
Reference #	37
Numerator	N/A
Denominator	N/A
Reported	projects
Unit	#
Methodology	# of projects supported by non-rate payer funding
Data Source	SoCalREN Databases
Core Value	Economic Resilience - Outside funding resources reduce economic burdens on program participants and expand the reach of the SoCalREN programs
Applicable Sectors	RES, PUB, COM

Metric	Total project costs supported by non-ratepayer funding
Reference #	38
Numerator	N/A
Denominator	N/A
Reported	Total costs
Unit	$
Methodology	Total costs of completed projects that leveraged non-ratepayer funding
Data Source	SoCalREN Databases
Core Value	Economic Resilience - Outside funding resources reduce economic burdens on program participants and expand the reach of the SoCalREN programs
Applicable Sectors	RES, PUB, COM

Metric	Average utility bill savings per project
Reference #	39
Numerator	Estimated annual utility bill costs
Denominator	total # of projects
Reported	Average savings
Unit	%
Methodology	Estimated annual utility bill costs/total # of projects
Data Source	SoCalREN Databases
Core Value	Economic Resilience - Total annual dollar savings for completed energy projects and dollars that can be reinvested into communities
Applicable Sectors	RES, PUB

Metric	Energy efficiency resources invested in Disadvantaged Communities/Low-Income communities/Hard-to-Reach customers
Reference #	40
Numerator	N/A
Denominator	N/A
Reported	Total investment
Unit	$
Methodology	total budget (includes admin, direct implementation, marketing, and incentive costs) utilized to support projects and/or provide services to Disadvantaged Communities/Low-Income communities/hard-to-reach customers
Data Source	SoCalREN Databases
Core Value	Economic Resilience - More investment in energy savings for disadvantaged communities/low-income communities/hard-to-reach customers ensure more equitable distribution of funds
Applicable Sectors	RES, PUB, COM

Metric	# of construction jobs supported
Reference #	41
Numerator	total value of projects supported through programs
Denominator	$92,000
Reported	Construction jobs
Unit	#
Methodology	total value of projects supported through programs/$92,000
Data Source	SoCalREN Databases Based on ARRA guidance to agencies on estimating job-years from government spending, it is estimated that 1 construction job is supported for every $92,000 construction dollars spent.
Core Value	Economic Resilience - Investments in energy projects support economies in local communities
Applicable Sectors	RES, PUB, COM

Metric	# of contractors actively participating in programs
Reference #	42
Numerator	N/A
Denominator	N/A
Reported	contractors
Unit	#
Methodology	# of contractors who have completed projects in the program in the current program year
Data Source	SoCalREN Databases
Core Value	Economic Resilience - Promoting vast program participation and promoting competition in the local market
Applicable Sectors	RES, PUB

Metric	Percent of participants in Disadvantaged Communities
Reference #	43
Numerator	total # of participants from DACs
Denominator	total # of participants
Reported	participants
Unit	#
Methodology	total # of participants from DACs/total # of participants
Data Source	SoCalREN Databases
Core Value	Equity - More investment in energy savings for DACs helps ensure more equitable distribution of funds
Applicable Sectors	RES, PUB, WE&T, COM

Metric	Percent of participants in Low-Income Communities
Reference #	44
Numerator	total # of participants from low-income communities
Denominator	total # of participants
Reported	participants
Unit	%
Methodology	total # of participants from low-income communities/total # of participants
Data Source	SoCalREN Databases
Core Value	Equity - More investment in energy savings for low-income communities helps ensure more equitable distribution of funds
Applicable Sectors	RES, PUB, WE&T, COM

Metric	Incentive Dollars Invested in Disadvantaged Communities
Reference #	45
Numerator	N/A
Denominator	N/A
Reported	Incentive dollars
Unit	$
Methodology	total incentive dollars disbursed to participants with completed projects in disadvantaged communities
Data Source	SoCalREN Databases
Core Value	Equity - More investment in energy savings for DACs helps ensure more equitable distribution of funds
Applicable Sectors	RES, PUB

Metric	# of GHG emission reductions in Disadvantaged Communities
Reference #	46
Numerator	N/A
Denominator	N/A
Reported	Metric tons
Unit	#
Methodology	MT CO2e (Annual Net kWh) + MT CO2e (Annual Net Therms)
Data Source	CET
Core Value	Equity - Total GHG reduction in DACs support CA state climate goals
Applicable Sectors	RES, PUB, WE&T

Metric	Percent of projects completed in Disadvantaged Communities
Reference #	47
Numerator	# of projects completed in DACs
Denominator	total # of projects completed
Reported	%
Unit	projects
Methodology	# of projects completed in DACs/total # of projects completed
Data Source	SoCalREN Databases
Core Value	Equity - More investment in energy savings for DACs helps ensure more equitable distribution of funds
Applicable Sectors	RES, PUB, COM

Metric	Percent of program participants primarily speaking a language other than English
Reference #	48
Numerator	total # of program participants primarily speaking a language other than English
Denominator	total # of program participants
Reported	participants
Unit	%
Methodology	total # of program participants primarily speaking a language other than English/total # of program participants
Data Source	SoCalREN Databases
Core Value	Equity - More investment in energy savings for participants who primarily speak another language other than English ensure more equitable distribution of funds
Applicable Sectors	RES, WE&T, COM

Metric	# of unique ZIP codes served
Reference #	49
Numerator	N/A
Denominator	N/A
Reported	Zip codes
Unit	#
Methodology	# of ZIP codes with completed projects per year
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, WE&T, COM

Metric	Percent of rural/HTR/underserved areas served
Reference #	50
Numerator	# of projects completed in rural/HTR/underserved areas
Denominator	total # of projects
Reported	projects
Unit	%
Methodology	# of projects completed in rural/HTR/underserved areas/total # of projects
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Los Angeles (kWh)
Reference #	51
Numerator	Annual Net kWh completed
Denominator	Total Annual Net kWh
Reported	Net kWh
Unit	kWh
Methodology	Annual Net kWh completed/Total Annual Net kWh
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Los Angeles (kW)
Reference #	52
Numerator	Annual Net kW completed
Denominator	Total Annual Net kW
Reported	Net kW
Unit	kW
Methodology	Annual Net kW completed/Total Annual Net kW
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Los Angeles (therm)
Reference #	53
Numerator	Annual Net therm completed
Denominator	Total Annual Net therm
Reported	Net therm
Unit	therm

Methodology	Annual Net therm completed/Total Annual Net therm
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Orange (kWh)
Reference #	54
Numerator	Annual Net kWh completed
Denominator	Total Annual Net kWh
Reported	Net kWh
Unit	kWh
Methodology	Annual Net kWh completed/Total Annual Net kWh
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Orange (kW)
Reference #	55
Numerator	Annual Net kW completed
Denominator	Total Annual Net kW
Reported	Net kW
Unit	kW
Methodology	Annual Net kW completed/Total Annual Net kW
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Orange (therm)
Reference #	56
Numerator	Annual Net therm completed
Denominator	Total Annual Net therm
Reported	Net therm
Unit	therm
Methodology	Annual Net therm completed/Total Annual Net therm
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - San Bernardino (kWh)
Reference #	57
Numerator	Annual Net kWh completed
Denominator	Total Annual Net kWh
Reported	Net kWh
Unit	kWh
Methodology	Annual Net kWh completed/Total Annual Net kWh
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - San Bernardino (kW)

Reference #	58
Numerator	Annual Net kW completed
Denominator	Total Annual Net kW
Reported	Net kW
Unit	kW
Methodology	Annual Net kW completed/Total Annual Net kW
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - San Bernardino (therm)
Reference #	59
Numerator	Annual Net therm completed
Denominator	Total Annual Net therm
Reported	Net therm
Unit	therm
Methodology	Annual Net therm completed/Total Annual Net therm
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Santa Barbara (kWh)
Reference #	60
Numerator	Annual Net kWh completed
Denominator	Total Annual Net kWh
Reported	Net kWh
Unit	kWh
Methodology	Annual Net kWh completed/Total Annual Net kWh
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Santa Barbara (kW)
Reference #	61
Numerator	Annual Net kW completed
Denominator	Total Annual Net kW
Reported	Net kW
Unit	kW
Methodology	Annual Net kW completed/Total Annual Net kW
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Santa Barbara (therm)
Reference #	62
Numerator	Annual Net therm completed
Denominator	Total Annual Net therm
Reported	Net therm
Unit	therm
Methodology	Annual Net therm completed/Total Annual Net therm

Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Riverside (kWh)
Reference #	63
Numerator	Annual Net kWh completed
Denominator	Total Annual Net kWh
Reported	Net kWh
Unit	kWh
Methodology	Annual Net kWh completed/Total Annual Net kWh
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Riverside (kW)
Reference #	64
Numerator	Annual Net kW completed
Denominator	Total Annual Net kW
Reported	Net kW
Unit	kW
Methodology	Annual Net kW completed/Total Annual Net kW
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Riverside (therm)
Reference #	65
Numerator	Annual Net therm completed
Denominator	Total Annual Net therm
Reported	Net therm
Unit	therm
Methodology	Annual Net therm completed/Total Annual Net therm
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Ventura (kWh)
Reference #	66
Numerator	Annual Net kWh completed
Denominator	Total Annual Net kWh
Reported	Net kWh
Unit	kWh
Methodology	Annual Net kWh completed/Total Annual Net kWh
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Ventura (kW)
Reference #	67

Numerator	Annual Net kW completed
Denominator	Total Annual Net kW
Reported	Net kW
Unit	kW
Methodology	Annual Net kW completed/Total Annual Net kW
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Ventura (therm)
Reference #	68
Numerator	Annual Net therm completed
Denominator	Total Annual Net therm
Reported	Net therm
Unit	therm
Methodology	Annual Net therm completed/Total Annual Net therm
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Kern (kWh)
Reference #	69
Numerator	Annual Net kWh completed
Denominator	Total Annual Net kWh
Reported	Net kWh
Unit	kWh
Methodology	Annual Net kWh completed/Total Annual Net kWh
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Kern (kW)
Reference #	70
Numerator	Annual Net kW completed
Denominator	Total Annual Net kW
Reported	Net kW
Unit	kW
Methodology	Annual Net kW completed/Total Annual Net kW
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Kern (therm)
Reference #	71
Numerator	Annual Net therm completed
Denominator	Total Annual Net therm
Reported	Net therm
Unit	therm
Methodology	Equity - Annual Net therm completed/Total Annual Net therm
Data Source	SoCalREN Databases

Core Value	Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Tulare (kWh)
Reference #	72
Numerator	Annual Net kWh completed
Denominator	Total Annual Net kWh
Reported	Net kWh
Unit	kWh
Methodology	Annual Net kWh completed/Total Annual Net kWh
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Tulare (kW)
Reference #	73
Numerator	Annual Net kW completed
Denominator	Total Annual Net kW
Reported	Net kW
Unit	kW
Methodology	Annual Net kW completed/Total Annual Net kW
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Tulare (therm)
Reference #	74
Numerator	Annual Net therm completed
Denominator	Total Annual Net therm
Reported	Net therm
Unit	therm
Methodology	Annual Net therm completed/Total Annual Net therm
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Kings (kWh)
Reference #	75
Numerator	Annual Net kWh completed
Denominator	Total Annual Net kWh
Reported	Net kWh
Unit	kWh
Methodology	Annual Net kWh completed/Total Annual Net kWh
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Kings (kW)
Reference #	76
Numerator	Annual Net kW completed

Denominator	Total Annual Net kW
Reported	Net kW
Unit	kW
Methodology	Annual Net kW completed/Total Annual Net kW
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Kings (therm)
Reference #	77
Numerator	Annual Net therm completed
Denominator	Total Annual Net therm
Reported	Net therm
Unit	therm
Methodology	Annual Net therm completed/Total Annual Net therm
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Inyo (kWh)
Reference #	78
Numerator	Annual Net kWh completed
Denominator	Total Annual Net kWh
Reported	Net kWh
Unit	kWh
Methodology	Annual Net kWh completed/Total Annual Net kWh
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Inyo (kW)
Reference #	79
Numerator	Annual Net kW completed
Denominator	Total Annual Net kW
Reported	Net kW
Unit	kW
Methodology	Annual Net kW completed/Total Annual Net kW
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Inyo (therm)
Reference #	80
Numerator	Annual Net therm completed
Denominator	Total Annual Net therm
Reported	Net therm
Unit	therm
Methodology	Annual Net therm completed/Total Annual Net therm
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region

Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Mono (kWh)
Reference #	81
Numerator	Annual Net kWh completed
Denominator	Total Annual Net kWh
Reported	Net kWh
Unit	kWh
Methodology	Annual Net kWh completed/Total Annual Net kWh
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Mono (kW)
Reference #	82
Numerator	Annual Net kW completed
Denominator	Total Annual Net kW
Reported	Net kW
Unit	kW
Methodology	Annual Net kW completed/Total Annual Net kW
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Mono (therm)
Reference #	83
Numerator	Annual Net therm completed
Denominator	Total Annual Net therm
Reported	Net therm
Unit	therm
Methodology	Annual Net therm completed/Total Annual Net therm
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Imperial (kWh)
Reference #	84
Numerator	Annual Net kWh completed
Denominator	Total Annual Net kWh
Reported	Net kWh
Unit	kWh
Methodology	Annual Net kWh completed/Total Annual Net kWh
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Imperial (kW)
Reference #	85
Numerator	Annual Net kW completed
Denominator	Total Annual Net kW

Reported	Net kW
Unit	kW
Methodology	Annual Net kW completed/Total Annual Net kW
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	Percent of relative participation by County - Imperial (therm)
Reference #	86
Numerator	Annual Net therm completed
Denominator	Total Annual Net therm
Reported	Net therm
Unit	therm
Methodology	Annual Net therm completed/Total Annual Net therm
Data Source	SoCalREN Databases
Core Value	Equity - Ensure program services are spread equitably across the region
Applicable Sectors	RES, PUB, COM

Metric	# of unique strategies delivered
Reference #	87
Numerator	N/A
Denominator	N/A
Reported	strategies
#	#
Methodology	# of unique strategies delivered to program participants
Data Source	SoCalREN Databases
Core Value	Innovation - Introduce programs and services to meet the unique barriers faced by participants
Applicable Sectors	RES, PUB, WE&T, COM

Metric	# of unique program or subprogram ideas introduced and implemented
Reference #	88
Numerator	N/A
Denominator	N/A
Reported	program(s) or subprogram(s)
Unit	#
Methodology	# of unique program or subprogram ideas introduced and implemented
Data Source	SoCalREN Databases
Core Value	Innovation - Introduce programs and services to meet the unique barriers faced by participants
Applicable Sectors	RES, PUB, WE&T, COM

Metric	# of emerging/innovative technologies promoted
Reference #	89
Numerator	N/A
Denominator	N/A
Reported	Technologies promoted
Unit	#
Methodology	# of emerging/innovative technologies promoted
Data Source	SoCalREN Databases

Core Value	Innovation - Encourages participants to explore and adopt a variety of EE technologies
Applicable Sectors	RES, PUB, WE&T

Metric	# of unique electric measures recommended and installed
Reference #	90
Numerator	N/A
Denominator	N/A
Reported	measures
Unit	#
Methodology	# of unique electric measures recommended and installed
Data Source	SoCalREN Databases
Core Value	Innovation - Support identification and installation of comprehensive energy savings opportunities
Applicable Sectors	RES, PUB, COM

Metric	# of unique gas measures recommended and installed
Reference #	91
Numerator	N/A
Denominator	N/A
Reported	measures
Unit	#
Methodology	# of unique gas measures recommended and installed
Data Source	SoCalREN Databases
Core Value	Innovation - Support identification and installation of comprehensive energy savings opportunities
Applicable Sectors	RES, PUB, COM

Attachment G - CPUC Common Sector Level Metrics: Updated Targets

SoCalREN - Sector Metrics with Targets

Note: See following pages for detailed calculations, assumptions, and notes.

Sector	Common Problem	Method Code	Ref #	Metric/Indicator	Unit	Baseline 2016	Reported 2017	Reported 2018	Reported 2019	Short-Term Targets 2020	Short-Term Targets 2021	Mid-Term Targets 2022 - 2023	Long-Term Targets 2024 - 2025
Portfolio	Greenhouse Gas Emissions	G	1	Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis	MT CO2	N/A	18,806.83	7,345.01	13,745.49	17,970.37	26,811.47	28,032.23	29,779.82
	Capturing Energy Savings	S1	2	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) - without C&S	First year annual kW gross	1,168.00	1,812.10	499.31	616.92	1,969.00	1,119.17	1,330.44	1,700.05
		S1	3	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) - without C&S	First year annual kW net	876	1,267.97	358.78	460.82	1,398.00	775.50	910.42	1,235.44
		S1	4	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) - without C&S	First year annual kWh gross	3,939,665.00	27,004,933.52	17,400,423.83	20,993,748.42	18,277,698.00	17,996,492.91	22,674,792.74	23,039,970.16
		S1	5	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) - without C&S	First year annual kWh net	2,954,749.00	18,169,801.91	11,063,618.41	14,069,912.30	12,761,483.00	13,223,993.66	16,706,381.85	17,122,149.47
		S1	6	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) - without C&S	First year annual Therm gross		264,768.92	74,208.91	450,434.21	249,360.00	521,348.46	730,397.55	750,139.93
		S1	7	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) - without C&S	First year annual Therm net		178,366.87	54,364.29	341,062.74	186,986.00	398,951.97	578,594.11	598,145.22
		S1	8	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) - without C&S	Lifecycle ex-ante kW gross	859,036.00	12,252.27	6,495.34	6,811.68	24,639.00	11,273.18	12,564.88	14,109.39
		S1	9	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) - without C&S	Lifecycle ex-ante kW net	644,277.00	8,249.29	4,584.81	5,061.96	18,143.00	8,578.56	9,473.68	10,129.73
		S1	10	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) - without C&S	Lifecycle ex-ante kWh gross	23,598,508.00	254,232,642.24	104,511,235.42	163,555,922.86	205,218,580.00	146,530,769.29	177,729,921.15	192,242,396.92
		S1	11	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) - without C&S	Lifecycle ex-ante kWh net	17,698,881.00	170,735,416.43	70,848,337.96	114,792,770.59	149,249,706.00	112,421,123.21	136,986,669.79	148,257,020.75
		S1	12	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) - without C&S	Lifecycle ex-ante Therm gross		1,356,052.13	870,756.57	5,948,965.70	4,197,099.00	6,037,939.02	8,387,575.22	8,604,341.82
		S1	13	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) - without C&S	Lifecycle ex-ante Therm net		979,860.60	703,885.11	4,467,486.54	3,176,356.00	4,669,585.47	6,671,462.49	6,887,882.50
	Disadvantaged Communities	S3	14	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	First year annual kW gross	445	594.51	43.96	267.28	432.08	506.09	506.09	591.41
		S3	15	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	First year annual kW net	334	445.88	39.56	227.19	367.27	430.18	430.18	502.70
		S3	16	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	First year annual kWh gross	1,335,081.00	2,314,691.11	752,696.81	3,597,992.41	3,218,963.37	3,770,348.17	3,770,348.17	4,405,972.89
		S3	17	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	First year annual kWh net	1,001,311.00	1,736,018.33	677,427.13	3,058,293.55	2,736,118.86	3,204,795.94	3,204,795.94	3,745,076.96
		S3	18	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	First year annual Therm gross		92,111.39	29,229.10	194,513.84	90,989.05	106,574.81	106,574.81	124,541.73
		S3	19	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	First year annual Therm net		69,083.54	26,306.19	165,336.76	77,340.69	90,588.58	90,588.58	105,860.47
		S3	20	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	Lifecycle ex-ante kW gross	305,831.00	3,593.93	782.18	3308.15898	7,777.41	9,109.62	9,109.62	10,645.37
		S3	21	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	Lifecycle ex-ante kW net	229,373.00	2,515.75	664.85	2811.935133	6,610.80	7,743.18	7,743.18	9,048.56
		S3	22	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	Lifecycle ex-ante kWh gross	7,994,064.00	12,193,556.32	9,704,610.10	42,057,881.94	57,941,340.62	67,866,267.03	67,866,267.03	79,307,512.01
		S3	23	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	Lifecycle ex-ante kWh net	5,995,548.00	9,145,167.24	8,734,149.09	35,749,199.65	49,250,139.53	57,686,326.98	57,686,326.98	67,411,385.21
		S3	24	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	Lifecycle ex-ante Therm gross		509,930.01	396,331.58	2,309,348.80	1,637,802.88	1,918,346.49	1,918,346.49	2,241,751.23
		S3	25	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities	Lifecycle ex-ante Therm net		382,447.51	356,698.42	1,962,946.48	1,392,132.45	1,630,594.52	1,630,594.52	1,905,488.54
	Hard to reach markets	S4	26	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	First year annual kW gross	445	594.51	43.96	0	432.08	506.09	506.09	591.41
		S4	27	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	First year annual kW net	334	445.88	39.56	0	367.27	430.18	430.18	502.70
		S4	28	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	First year annual kWh gross	1,335,081.00	2,314,691.11	752,696.81		3,218,963.37	3,770,348.17	3,770,348.17	4,405,972.89
		S4	29	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	First year annual kWh net	1,001,311.00	1,736,018.33	677,427.13	0	2,736,118.86	3,204,795.94	3,204,795.94	3,745,076.96

		S4	30	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	First year annual Therm gross		92,111.39	29,229.10	0	90,989.05	106,574.81	106,574.81	124,541.73
		S4	31	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	First year annual Therm net		69,083.54	26,306.19	0	77,340.69	90,588.58	90,588.58	105,860.47
		S4	32	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	Lifecycle ex-ante kW gross	305,831.00	3,593.93	782.18		7,777.41	9,109.62	9,109.62	10,645.37
		S4	33	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	Lifecycle ex-ante kW net	229,373.00	2,515.75	664.85	0	6,610.80	7,743.18	7,743.18	9,048.56
		S4	34	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	Lifecycle ex-ante kWh gross	7,994,064.00	12,193,556.32	9,704,610.10	0	57,941,340.62	67,866,267.03	67,866,267.03	79,307,512.01
		S4	35	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	Lifecycle ex-ante kWh net	5,639,296.00	9,145,167.24	8,734,149.09	0	49,250,139.53	57,686,326.98	57,686,326.98	67,411,385.21
		S4	36	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	Lifecycle ex-ante Therm gross		509,930.01	396,331.58	0	1,637,802.88	1,918,346.49	1,918,346.49	2,241,751.23
		S4	37	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets	Lifecycle ex-ante Therm net		382,447.51	356,698.42	0	1,392,132.45	1,630,594.52	1,630,594.52	1,905,488.54
	Cost per unit saved	LC	38	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Gross kW	$7.00	$2,232.06	$1,959.68	$1,845.82	$ 411.03	$ 1,424.58	$ 1,089.94	$ 798.49
		LC	39	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Net kW	$9.00	$3,188.65	$2,750.60	$2,328.14	$ 538.26	$ 1,663.69	$ 1,258.86	$ 929.46
		LC	40	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Gross kWh	$0.25	$2.20	$0.99	$0.12	$ 0.05	$ 0.10	$ 0.06	$ 0.05
		LC	41	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Net kWh	$0.33	$2.94	$1.22	$0.15	$ 0.07	$ 0.12	$ 0.07	$ 0.06
		LC	42	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Gross Therm		$19.69	$8.48	$1.74	$ 1.98	$ 1.89	$ 1.09	$ 0.85
		LC	43	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Net Therm		$26.25	$10.29	$2.29	$ 2.60	$ 2.43	$ 1.36	$ 1.05
		LC	44	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Gross kW	$10.00	$2,845.50	$2,819.53	$3,249.54	$ 859.09	$ 2,765.42	$ 2,566.96	$ 2,199.73
		LC	45	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Net kW	$13.00	$4,065.01	$3,945.28	$4,098.65	$ 1,125.00	$ 3,247.07	$ 2,968.47	$ 2,376.83
		LC	46	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Gross kWh	$0.37	$3.52	$1.63	$0.21	$ 0.11	$ 0.19	$ 0.15	$ 0.13
		LC	47	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Net kWh	$0.49	$4.70	$2.01	$0.27	$ 0.15	$ 0.23	$ 0.18	$ 0.14
		LC	48	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Gross Therm		$27.72	$12.94	$3.07	$ 4.14	$ 3.68	$ 2.55	$ 2.17
		LC	49	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Net Therm		$36.96	$15.70	$4.03	$ 5.43	$ 4.74	$ 3.19	$ 2.69
Residential - Single Family	Capturing energy savings	S1	50	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	First year annual kW gross	692	358.67	114.27	TBD	N/A	36.00	TBD	TBD
		S1	51	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	First year annual kW net	519	269	92.29	TBD	N/A	32.76	TBD	TBD
		S1	52	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	First year annual kWh gross	394,820.00	185,963.52	59,851.40	TBD	N/A	179,100.00	TBD	TBD
		S1	53	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	First year annual kWh net	296,115.00	139,472.64	48,424.71	TBD	N/A	162,981.00	TBD	TBD
		S1	54	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	First year annual Therm gross		28,916.92	12,028.21	TBD	N/A	21,132.09	TBD	TBD
		S1	55	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	First year annual Therm net		21,687.69	9,952.99	TBD	N/A	12,003.90	TBD	TBD
		S1	56	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	Lifecycle ex-ante kW gross	257,832.00	2,154.99	2,049.18	TBD	N/A	192.00	TBD	TBD
		S1	57	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	Lifecycle ex-ante kW net	193,374.00	1,508.50	1,551.75	TBD	N/A	245.62	TBD	TBD
		S1	58	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	Lifecycle ex-ante kWh gross	2,329,439.00	1,117,890.79	1,074,879.41	TBD	N/A	955,200.00	TBD	TBD
		S1	59	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	Lifecycle ex-ante kWh net	1,747,079.00	838,418.09	869,172.52	TBD	N/A	869,232.00	TBD	TBD
		S1	60	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	Lifecycle ex-ante Therm gross		175,561.49	219,316.84	TBD	N/A	151,103.96	TBD	TBD
		S1	61	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers	Lifecycle ex-ante Therm net		131,671.12	181,397.47	TBD	N/A	83,082.02	TBD	TBD
	Greenhouse gas emissions	G	62	Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis	MT CO2	128	25.67	6.63	TBD	N/A	113.19	TBD	TBD
	Depth of interventions	D1-D	63	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible) - DOWNSTREAM	Lifecycle NET kW/Service Account	296.6	2.95	9.64	TBD	N/A	0.05	TBD	TBD

		D1-D	64	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible) - DOWNSTREAM	Lifecycle NET kWh/Service Account	2,680.00	1,637.54	5,398.59	TBD	N/A	173.85	TBD	TBD
		D1-D	65	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible) - DOWNSTREAM	Lifecycle NET Therms/Service Account		257.17	1,126.69	TBD	N/A	16.62	TBD	TBD
		D1-M	66	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible) - MIDSTREAM	Lifecycle NET kW/Service Account	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
		D1-M	67	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible) - MIDSTREAM	Lifecycle NET kWh/Service Account	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
		D1-M	68	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible) - MIDSTREAM	Lifecycle NET Therms/Service Account	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
		D1-O	69	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible) - Opt-out	Lifecycle NET kW/Service Account	1.06	N/A	N/A	N/A	N/A	N/A	N/A	N/A
		D1-O	70	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible) - Opt-out	Lifecycle NET kWh/Service Account	605.6	N/A	N/A	N/A	N/A	N/A	N/A	N/A
		D1-O	71	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible) - Opt-out	Lifecycle NET Therms/Service Account	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
		D1-U	72	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible) - UPSTREAM	Lifecycle NET kW/Service Account	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
		D1-U	73	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible) - UPSTREAM	Lifecycle NET kWh/Service Account	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
		D1-U	74	Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible) - UPSTREAM	Lifecycle NET Therms/Service Account	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Penetration of energy efficiency programs in the eligibl	P1	75	Percent of participation relative to eligible population	%	0.00%	3.64%	1.14%	0.00%	N/A	0.14%	TBD	TBD
		P3	76	Percent of participation in disadvantaged communities	%	0.00%	0.87%	1.07%	0.00%	N/A	0.52%	TBD	TBD
		P4	77	Percent of participation by customers defined as "hard-to-reach"	%	0.00%	1.22%	0.85%	0.00%	N/A	0.90%	TBD	TBD
	Cost per unit saved	LC	78	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Gross kW	$9.00	$1,049.85	$453.15	TBD	N/A	$5,769.18	TBD	TBD
		LC	79	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Net kW	$12.00	$1,499.79	$598.41	TBD	N/A	$7,391.76	TBD	TBD
		LC	80	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Gross kWh	$1.02	$2.02	$0.86	TBD	N/A	$1.49	TBD	TBD
		LC	81	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Net kWh	$1.36	$2.70	$1.07	TBD	N/A	$1.63	TBD	TBD
		LC	82	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Gross Therm		$12.89	$4.23	TBD	N/A	$9.39	TBD	TBD
		LC	83	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Net Therm		$17.18	$5.12	TBD	N/A	$17.08	TBD	TBD
		LC	84	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Gross kW	$16.00	$1,740.28	$764.91	TBD	N/A	$5,581.16	TBD	TBD
		LC	85	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Net kW	$21.00	$2,486.12	$1,010.10	TBD	N/A	$7,150.86	TBD	TBD
		LC	86	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Gross kWh	$1.76	$3.35	$1.46	TBD	N/A	$1.44	TBD	TBD
		LC	87	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Net kWh	$2.35	$4.47	$1.80	TBD	N/A	$1.58	TBD	TBD
		LC	88	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Gross Therm		$21.36	$7.15	TBD	N/A	$9.09	TBD	TBD
		LC	89	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Net Therm		$28.48	$8.64	TBD	N/A	$16.53	TBD	TBD
	Energy intensity	EI1	90	INDICATOR - Average energy use intensity of single family homes (average usage per household—not adjusted	BTU from kWh/Service Account	N/A	22,550,923.07	23,229,433.25	N/A	N/A	TBD	TBD	TBD
		EI1	91	INDICATOR - Average energy use intensity of single family homes (average usage per household—not adjusted	BTU/Therm/Service Account	N/A	42,988,392.57	42,606,325.06	N/A	N/A	TBD	TBD	TBD
Residential - Multi-Family	Capturing Energy Savings	S1-IU	92	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - IN UNIT	First year annual kW gross	429	927.82	47.99	312.77	452.65	172.30	240.83	239.23
		S1-IU	93	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - IN UNIT	First year annual kW net	322	642.88	32.39	250.74	344.3	132.96	187.09	187.16
		S1-IU	94	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - IN UNIT	First year annual kWh gross	3,199,006.00	6,945,887.02	1,289,543.59	3,316,086.78	5,867,422.37	2,131,013.86	3,362,158.60	3,720,276.39
		S1-IU	95	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - IN UNIT	First year annual kWh net	2,399,255.00	4,905,626.81	957,412.67	2,569,435.55	4,462,986.16	1,678,598.70	2,683,658.55	2,980,785.51
		S1-IU	96	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - IN UNIT	First year annual Therm gross		192,944.53	35,946.88	299,696.46	153,610.39	291,724.05	515,018.96	530,073.91
		S1-IU	97	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - IN UNIT	First year annual Therm net		130,237.56	26,459.08	230,836.64	116,841.95	228,359.08	412,494.56	427,035.18

S1-IU	98	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - IN UNIT	Lifecycle ex-ante kW gross	542,550.00	5,123.61	791.67	3,861.76	8,147.63	1,877.93	2,389.28	2,589.93
S1-IU	99	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - IN UNIT	Lifecycle ex-ante kW net	406,912.00	3,586.53	554.17	3,102.22	6,197.40	1,453.08	1,876.31	2,029.65
S1-IU	100	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - IN UNIT	Lifecycle ex-ante kWh gross	19,194,038.00	34,599,953.22	14,954,742.85	39,135,002.48	105,613,602.57	22,376,912.24	34,941,818.36	38,693,539.19
S1-IU	101	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - IN UNIT	Lifecycle ex-ante kWh net	14,084,977.00	25,949,964.92	12,302,572.53	30,292,939.55	80,333,750.89	17,623,343.81	27,827,965.11	30,966,173.08
S1-IU	102	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - IN UNIT	Lifecycle ex-ante Therm gross		899,682.96	403,876.10	3,904,686.34	2,764,987.01	3,281,012.25	5,641,860.35	5,780,976.32
S1-IU	103	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - IN UNIT	Lifecycle ex-ante Therm net		674,762.22	328,196.95	2,977,767.77	2,103,155.02	2,567,844.13	4,506,230.12	4,648,610.33
S1-MM	104	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - MASTER METERED	First year annual kW gross	46.4	0	0	20.91	0	13.30	15.49	15.39
S1-MM	105	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - MASTER METERED	First year annual kW net	34.8	0	0	17.59	0	10.26	12.04	12.04
S1-MM	106	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - MASTER METERED	First year annual kWh gross	345,839.00	0	119,553.00	249,385.43	543,966.06	187,352.69	246,326.20	272,563.45
S1-MM	107	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - MASTER METERED	First year annual kWh net	259,379.00	0	80,698.28	209,930.47	413,761.42	147,577.63	196,616.37	218,385.16
S1-MM	108	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - MASTER METERED	First year annual Therm gross		4,609.00	10,849.00	99,238.72	46,360.60	88,988.26	130,918.93	134,745.93
S1-MM	109	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - MASTER METERED	First year annual Therm net		3,111.08	8,233.25	73,788.59	35,263.65	69,659.24	104,857.00	108,553.26
S1-MM	110	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - MASTER METERED	Lifecycle ex-ante kW gross	58,654.00	0	0	245.1	0	143.03	151.65	164.38
S1-MM	111	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - MASTER METERED	Lifecycle ex-ante kW net	43,991.00	0	0	205.61	0	110.67	119.09	128.82
S1-MM	112	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - MASTER METERED	Lifecycle ex-ante kWh gross	2,075,031.00	0	1,312,691.94	2,684,261.73	9,791,389.05	1,841,793.34	2,396,652.10	2,653,981.85
S1-MM	113	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - MASTER METERED	Lifecycle ex-ante kWh net	1,556,273.00	0	984,518.96	2,250,301.23	7,447,705.50	1,450,537.81	1,908,714.38	2,123,963.41
S1-MM	114	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - MASTER METERED	Lifecycle ex-ante Therm gross		17,408.93	129,437.28	1,348,019.57	834,490.81	1,359,249.37	1,947,746.25	1,995,773.42
S1-MM	115	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - MASTER METERED	Lifecycle ex-ante Therm net		13,056.70	109,729.32	994,772.65	634,745.67	1,063,799.91	1,555,691.26	1,604,845.35
SI-CA	116	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - COMMON AREA	First year annual kW gross		101.61	65.32	116.24	616.18	101.09	77.61	77.10
SI-CA	117	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - COMMON AREA	First year annual kW net		69.09	44.09	89.49	468.69	78.01	60.29	60.32
SI-CA	118	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - COMMON AREA	First year annual kWh gross		598,149.98	340,947.41	3,604,400.20	1,551,310.43	3,068,053.37	3,473,433.03	3,843,403.13
SI-CA	119	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - COMMON AREA	First year annual kWh net		425,788.46	252,537.12	2,814,604.27	1,179,986.13	2,416,704.33	2,772,477.26	3,079,437.97

	SI-CA	120	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - COMMON AREA	First year annual Therm gross		14,707.47	5,875.42	30,720.03	25,107.18	93,552.06	51,796.67	53,310.78
	SI-CA	121	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - COMMON AREA	First year annual Therm net		9,927.54	4,313.33	25,310.50	19,097.48	73,231.75	41,485.55	42,947.93
	SI-CA	122	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - COMMON AREA	Lifecycle ex-ante kW gross		564.67	910.41	1,471.82	11,091.22	1,234.46	910.62	987.09
	SI-CA	123	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - COMMON AREA	Lifecycle ex-ante kW net		395.27	637.29	1,125.13	8,436.41	955.18	715.11	773.55
	SI-CA	124	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - COMMON AREA	Lifecycle ex-ante kWh gross		3,098,623.22	4,257,658.31	44,475,961.65	27,923,587.81	34,992,350.71	39,710,511.69	43,974,249.54
	SI-CA	125	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - COMMON AREA	Lifecycle ex-ante kWh net		2,323,967.42	3,499,406.89	34,543,418.81	21,239,750.30	27,558,861.59	31,625,793.55	35,192,289.23
	SI-CA	126	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - COMMON AREA	Lifecycle ex-ante Therm gross		71,240.76	70,579.35	402,756.79	451,929.29	1,062,314.44	581,941.12	596,290.52
	SI-CA	127	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts) - COMMON AREA	Lifecycle ex-ante Therm net		53,430.57	57,533.17	332,686.12	343,754.73	831,407.41	464,804.24	479,490.33
Greenhouse gas emissions	G	128	Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis	MT CO2	N/A	981.16	81.38	2,557.00	398.00	2,886.28	4,228.23	4,534.82
Depth of interventions	D3a	129	Energy savings (kWh, kw, therms) per project (building)	Lifecycle Net kW/Service Account	136,253.86	8.64	17.02	4.87	33.61	3.01	2.14	2.25
	D3a	130	Energy savings (kWh, kw, therms) per project (building)	Lifecycle Net kWh/Service Account	4,820,319.00	61,331.74	239,807.12	74,438.98	250,429.00	56,446.03	49,685.18	53,274.52
	D3a	131	Energy savings (kWh, kw, therms) per project (building)	Lifecycle Net Therms/Service Account		1,607.92	7,077.99	4,942.85	7,079.00	4,246.68	4,141.64	4,119.52
	D4	132	Average savings per participant Savings per project (property)	Lifecycle Net kW/Service Account	20,495.58	99.54	119.15	68.36	311.36	42.27	31.39	30.05
	D4	133	Average savings per participant Savings per project (property)	Lifecycle Net kWh/Service Account	725,082.00	706,848.31	1,678,649.84	1,045,747.60	2,319,600.00	792,975.65	714,528.51	761,581.50
	D4	134	Average savings per participant Savings per project (property)	Lifecycle Net Therms/Service Account		18,531.24	49,545.94	69,439.06	65,567.00	59,658.97	56,538.85	56,318.50
	D5	135	Energy savings (kWh, kw, therms) per square foot	Lifecycle Net kW/Sq Ft	0.12	0	0	0	0.00	0.00	0.00	0.00
	D5	136	Energy savings (kWh, kw, therms) per square foot	Lifecycle Net kWh/Sq Ft	4.13	3.85	8.96	5.63	12.50	4.27	3.76	4.03
	D5	137	Energy savings (kWh, kw, therms) per square foot	Lifecycle Net Therms/Sq Ft		0.1	0.26	0.37	0.35	0.32	0.31	0.31
Penetration of energy efficiency programs in the eligible market	P1-U	138	Percent of multi-family participation relative to eligible population (by unit and by property) - UNIT	%	40.00%	56.26%	12.20%	1.47%	0.79%	1.35%	2.02%	2.10%
	P1-P	139	Percent of multi-family participation relative to eligible population (by unit and by property) - PROPERTY	%	0.00%	1.71%	0.43%	0.01%	0.00%	0.02%	0.04%	0.04%
	P2	140	Percent of square feet of eligible population participating (by property)	%	30.00%	0.41%	0.10%	0.74%	0.50%	0.67%	1.00%	1.03%
	P3: DAC	141	Percent of participation in disadvantaged communities	%	0.00%	0.02%	0.00%	0.13%	0.01%	0.12%	0.19%	0.21%
	P3: HTR	142	Percent of participation by customers defined as "hard-to-reach"	%	0.00%	3.50%	0.64%	0.00%	0.01%	0.01%	0.02%	0.03%
Penetration of benchmarking in the eligible market	B1	143	Percent of benchmarked multi-family properties relative to the eligible population	%	0.19%	N/A	N/A	0.00%	N/A	N/A	N/A	N/A
	B6	144	Percent of benchmarking by properties defined as "hard-to-reach"	%	71.00%	N/A	N/A	56.00%	N/A	N/A	N/A	N/A
Cost per unit saved	LC	145	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Gross kW	$6.00	$1,182.21	$1,506.53	$1,845.82	$ 295.49	1,974.48	1,885.95	$ 1,426.37
	LC	146	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Net kW	$7.00	$1,688.87	$2,152.19	$2,328.14	$ 388.48	2,551.77	2,389.26	$ 1,820.29
	LC	147	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Gross kWh	$0.16	$0.18	$0.12	$0.12	$ 0.04	0.11	0.08	$ 0.06
	LC	148	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Net kWh	$0.21	$0.24	$0.15	$0.15	$ 0.05	0.14	0.10	$ 0.08
	LC	149	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Gross Therm		$6.80	$4.25	$1.74	$ 1.40	1.41	0.97	$ 0.80
	LC	150	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Net Therm		$9.07	$5.18	$2.29	$ 1.84	1.81	1.21	$ 1.00
	LC	151	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Gross kW	$7.00	$1,105.22	$2,054.62	$3,249.54	$ 730.72	3,660.40	3,801.66	$ 3,415.39
	LC	152	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Net kW	$10.00	$1,578.89	$2,935.18	$4,098.65	$ 960.67	4,730.62	4,820.26	$ 3,794.88
	LC	153	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Gross kWh	$0.21	$0.17	$0.17	$0.21	$ 0.10	0.20	0.16	$ 0.14
	LC	154	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Net kWh	$0.27	$0.22	$0.21	$0.27	$ 0.13	0.25	0.20	$ 0.16
	LC	155	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Gross Therm		$6.36	$5.79	$3.07	$ 3.47	2.62	1.96	$ 1.67

		LC	156	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Net Therm		$8.48	$7.06	$4.03	$ 4.56	3.35	2.46	$ 2.08
	Energy intensity	EI2	157	INDICATOR - Average energy use intensity of multifamily buildings (average usage per square foot – not adjusted and Average energy use intensity of multifamily units, including in-unit accounts) - SQFT	BTU from kWh/sqft	N/A	10,842.43	10,752.85	10,425.05	N/A	N/A	N/A	N/A
		EI2	158	INDICATOR - Average energy use intensity of multifamily buildings (average usage per square foot – not adjusted and Average energy use intensity of multifamily units, including in-unit accounts) - SQFT	BTU from Therms /sqft	N/A	27,200.00	28,730.59	21,273.29	N/A	N/A	N/A	N/A
		EI2	159	INDICATOR - Average energy use intensity of multifamily buildings (average usage per square foot – not adjusted and Average energy use intensity of multifamily units, including in-unit accounts) - UNIT	BTU from kWh/unit	N/A	15,013,876.06	15,378,358.29	N/A	N/A	N/A	N/A	N/A
		EI2	160	INDICATOR - Average energy use intensity of multifamily buildings (average usage per square foot – not adjusted and Average energy use intensity of multifamily units, including in-unit accounts) - UNIT	BTU from therms /unit	N/A	32,519,053.95	34,148,064.43	N/A	N/A	N/A	N/A	N/A
Public	Capturing Energy Savings	S1	161	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	First year annual kW gross	857	424	271.73	167	900.00	790.00	994.00	1,368.34
		S1	162	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	First year annual kW net	653	287	190	103	585.00	516.00	649.00	975.92
		S1	163	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	First year annual kWh gross	10,000,538.00	19,274,933.00	15,590,528.43	13,823,876.00	10,315,000.00	12,370,987.00	15,570,380.00	15,203,727.19
		S1	164	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	First year annual kWh net	7,823,378.00	12,698,914.00	9,724,545.64	8,475,942.00	6,704,750.00	8,767,144.00	11,034,509.00	10,843,540.83
		S1	165	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	First year annual Therm gross	14,964.00	23,591.00	9,509.40	20,779.00	24,282.00	25,952.00	32,663.00	32,009.32
		S1	166	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	First year annual Therm net	8,946.00	13,403.00	5,405.64	11,127.00	15,783.00	15,698.00	19,757.00	19,608.85
		S1	167	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	Lifecycle ex-ante kW gross	N/A	4,409.00	2,744.09	1,233.00	5,400.00	7,748.00	9,083.34	10,368.00
		S1	168	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	Lifecycle ex-ante kW net	N/A	2,759.00	1,841.61	629	3,510.00	5,748.00	6,739.18	7,197.71
		S1	169	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	Lifecycle ex-ante kWh gross	112,273,601.00	215,416,175.00	82,911,262.91	77,260,697.00	61,890,000.00	85,644,676.00	100,411,000.00	106,920,626.34
		S1	170	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	Lifecycle ex-ante kWh net	88,855,877.00	141,623,066.00	53,192,667.06	47,706,111.00	40,228,500.00	64,307,286.00	75,394,748.75	79,974,595.03
		S1	171	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	Lifecycle ex-ante Therm gross	139,010.00	192,158.00	47,547.00	293,503.00	145,692.00	184,259.00	216,027.50	231,301.57
		S1	172	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) across Public Sector programs	Lifecycle ex-ante Therm net	85,297.00	106,940.00	27,028.20	162,260.00	94,700.00	123,452.00	144,736.87	154,936.49
	Greenhouse gas emissions	G	173	Greenhouse gasses (MT CO2eq) based on net lifecycle kWh and Therms savings, reported on an annual basis, incorporating average fuel/technology mix	Net Lifecycle kWh Savings MT CO2	10,823.00	17,800.00	7,257.00	11,188.00	17,572.37	20,299.00	23,799.00	25,245.00
		G	174	Greenhouse gasses (MT CO2eq) based on net lifecycle kWh and Therms savings, reported on an annual basis, incorporating average fuel/technology mix	Net Lifecycle Therm Savings MT CO2	499	626	172.02	842	511.60	722.00	847.00	906.00
	Depth of interventions	D3b	175	INDICATOR - Average percent energy savings (kWh, kw, therms) per project building - kWh	kWh	N/A	N/A	261,839.04	1,294,139.88	N/A	N/A	N/A	N/A
		D3b	176	INDICATOR - Average percent energy savings (kWh, kw, therms) per project building - kW	kW	N/A	N/A	30.81	49.75	N/A	N/A	N/A	N/A
		D3b	177	INDICATOR - Average percent energy savings (kWh, kw, therms) per project building - Therm	Therm	N/A	N/A	-	49,002.50	N/A	N/A	N/A	N/A
		D3b	178	INDICATOR - Average percent energy savings (kWh, kw, therms) per project facility - kWh	kWh	N/A	N/A	1,133,524.90	1,624,043.13	N/A	N/A	N/A	N/A
		D3b	179	INDICATOR - Average percent energy savings (kWh, kw, therms) per project facility - kW	kW	N/A	N/A	22.93	10.04	N/A	N/A	N/A	N/A
		D3b	180	INDICATOR - Average percent energy savings (kWh, kw, therms) per project facility - Therm	Therm	N/A	N/A	27,028.20	64,255.00	N/A	N/A	N/A	N/A
		D5	181	INDICATOR - Average annual energy savings (kWh, kw, therms) per project building floor plan area	kWh/Sq Ft	N/A	N/A	2.17	9.54	N/A	N/A	N/A	N/A
		D5	182	INDICATOR - Average annual energy savings (kWh, kw, therms) per project building floor plan area	kW/Sq Ft	N/A	N/A	0	0	N/A	N/A	N/A	N/A
		D5	183	INDICATOR - Average annual energy savings (kWh, kw, therms) per project building floor plan area	Therm/Sq Ft	N/A	N/A	N/A	0.59	N/A	N/A	N/A	N/A
	Water	W1	184	INDICATOR - Average annual energy savings (kWh, kW therms) per annual flow through project water/wastewater facilities	kW/Mgal	N/A	N/A	2,097,128.00	730,630.00	N/A	N/A	N/A	N/A
		W1	185	INDICATOR - Average annual energy savings (kWh, kW therms) per annual flow through project water/wastewater facilities	kWh/Mgal	N/A	N/A	92	55	N/A	N/A	N/A	N/A
		W1	186	INDICATOR - Average annual energy savings (kWh, kW therms) per annual flow through project - Net Therms water/wastewater facilities	Therm/Mgal	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

		W2	187	INDICATOR - Percent of Public Sector water/wastewater flow (i.e., annual average Million Gallons per Day) enrolled in non-building water/wastewater programs—estimate within +/-20% of flow through eligiblefacilities (treatment facilities pumping stations), /-10% of flow through project facilities	%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Penetration of energy efficiency programs and benchmarking in the eligible market	P1	188	Percent of Public Sector accounts participating in programs	%	1.05%	0.00%	0.51%	0.38%	0.47%	0.82%	0.92%	1.10%
		P2	189	INDICATOR - Percent of estimated floorplan area (i.e., ft2) of all Public Sector buildings participating in building projects—estimate within +/-15% of sector-wide building area, +/-5% of project building area	%	N/A	N/A	1.30%	0.44%	N/A	N/A	N/A	N/A
	Cost per unit saved	LC	190	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Gross kW	N/A	N/A	N/A	N/A	$7,604.81	$ 227.96	$ 191.25	$ 153.09
		LC	191	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Net kW	N/A	N/A	N/A	N/A	$8,005.06	$ 239.99	$ 201.27	$ 161.19
		LC	192	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Gross kWh	N/A	N/A	N/A	N/A	$0.72	$ 0.02	$ 0.02	$ 0.01
		LC	193	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Net kWh	N/A	N/A	N/A	N/A	$0.68	$ 0.02	$ 0.02	$ 0.01
		LC	194	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Gross Therm	N/A	N/A	N/A	N/A	$288.18	$ 8.21	$ 6.88	$ 5.51
		LC	195	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Net Therm	N/A	N/A	N/A	N/A	$273.77	$ 8.64	$ 7.25	$ 5.80
		LC	196	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Gross kW	N/A	N/A	N/A	N/A	$8,851.65	$ 1,383.82	$ 1,222.67	$ 1,039.33
		LC	197	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Net kW	N/A	N/A	N/A	N/A	$9,317.53	$ 1,456.80	$ 1,286.72	$ 1,094.26
		LC	198	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Gross kWh	N/A	N/A	N/A	N/A	$0.84	$ 0.12	$ 0.11	$ 0.09
		LC	199	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Net kWh	N/A	N/A	N/A	N/A	$0.80	$ 0.13	$ 0.12	$ 0.10
		LC	200	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Gross Therm	N/A	N/A	N/A	N/A	$335.43	$ 49.82	$ 44.01	$ 37.42
		LC	201	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Net Therm	N/A	N/A	N/A	N/A	$318.66	$ 52.44	$ 46.32	$ 39.39
	Investment In energy efficiency	F2	202	INDICATOR - Total program-backed financing distributed to Public Sector customers requiring repayment (i.e., loans, OBF)	$	N/A	N/A	$4,821,755.28	$3,291,778.10	N/A	N/A	N/A	N/A
	Energy intensity	EI4	203	Average energy use intensity of all Public Sector buildings	BTU from kWh/Service Account	34	N/A	33.89	32.51	33.98	33.90	33.84	33.69
		EI4	204	Average energy use intensity of all Public Sector buildings	BTU from Therms/Service Account	N/A	N/A	N/A	N/A	0	0.00	0.00	0.00
		B3	205	Percent of Public sector buildings with current benchmark	%	1.50%	N/A	0.80%	0.53%	1.89%	2.75%	2.75%	3.69%
		B4	206	INDICATOR - Percent of floorplan area of all Public sector buildings with current benchmark	%	N/A	N/A	23.66%	8.39%	N/A	N/A	N/A	N/A
Workforce Education and Training	Expanding WE&T Reach via Collaborations	1	207	Number of partnerships by sector (complete "partnership" defined by curriculum developed jointly + agreement)	#	0	3	3	16	20	26.00	32.50	42.50
	Penetration of training	1	208	Number of participants by sector - Residential	#	4,577.00	170	125	62	150	217.00	221.00	300.00
		1	209	Number of participants by sector - Commercial	#	7,564.00	170	0	63	150	175.00	212.50	262.50
		1	210	Percent of participation relative to eligible target population for curriculum	%	N/A	0.02%	0.02%	5.00%	0.21%	0.24%	0.30%	0.36%
	INDICATOR - Diversity of participants	1	211	Percent of disadvantaged participants trained (ID by zip code)	%	1.00%	4.79%	4.79%	7.43%	65.00%	70.00%	70.00%	70.00%
		1	212	Percent of incentive dollars spent on measures verified to have been installed by contractors with a demonstrated commitment to provide career pathways to disadvantaged workers	%	0.00%	0.00%	0.00%	NA	10.00%	40.00%	40.00%	50.00%
		1	213	INDICATOR - Number of energy efficiency projects related to the WE&T training on which a participant has been employed for 12 months after receiving the training	#	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Commercial	Capturing energy savings	S1	111	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First Year Annual Gross kWh	NA	NA	NA	NA	NA	59,986	44,990	NA
		S1	112	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First Year Annual Net kWh	NA	NA	NA	NA	NA	50,988	38,241	NA
		S1	113	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First Year Annual Gross kW	NA	NA	NA	NA	NA	6	5	NA
		S1	114	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	First Year Annual Net kW	NA	NA	NA	NA	NA	6	4	NA
		S1	115	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle Gross kWh	NA	NA	NA	NA	NA	719,837	539,878	NA
		S1	116	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle Net kWh	NA	NA	NA	NA	NA	611,862	458,896	NA
		S1	117	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle Gross kW	NA	NA	NA	NA	NA	78	60	NA
		S1	118	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)	Lifecycle Net kW	NA	NA	NA	NA	NA	66	48	NA
		S2	119	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage - FIRST YEAR ANNUAL GROSS KWH	%	NA	NA	NA	NA	NA	0.0%	0.0%	NA
		S2	120	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage - FIRST YEAR ANNUAL NET KWH	%	NA	NA	NA	NA	NA	0.0%	0.0%	NA
		S2	121	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage - FIRST YEAR ANNUAL GROSS KW	%	NA	NA	NA	NA	NA	0.0%	0.0%	NA
		S2	122	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage - FIRST YEAR ANNUAL NET KW	%	NA	NA	NA	NA	NA	0.0%	0.0%	NA

	S2	123	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage - LIFECYCLE GROSS KWH	%	NA	NA	NA	NA	NA	0.0%	0.0%	NA
	S2	124	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage - LIFECYCLE NET	%	NA	NA	NA	NA	NA	0.0%	0.0%	NA
	S2	125	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage - LIFECYCLE GROSS KW	%	NA	NA	NA	NA	NA	0.0%	0.0%	NA
	S2	126	First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage - LIFECYCLE NET KW	%	NA	NA	NA	NA	NA	0.0%	0.0%	NA
Greenhouse gas emissions	G	127	Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis	MT CO2	NA	NA	NA	NA	NA	13	10	NA
Depth of interventions	D2	128	Energy savings (gross kWh) as a fraction of total project consumption	kWh/ Project	NA	NA	NA	NA	NA	1.9%	1.9%	NA
Penetration of energy efficiency programs in the eligible market	P1S	129	Percent of participation relative to eligible population for small, medium, and large customers - SMALL	%	NA	NA	NA	NA	NA	0.0%	0.0%	NA
	P2	132	Percent of square feet of eligible population	%	NA	NA	NA	NA	NA	0.0%	0.0%	NA
	P4	133	Percent of participation by customers defined as "hard to reach"	%	NA	NA	NA	NA	NA	100.0%	100.0%	NA
Cost per unit saved	LC	139	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Gross kWh	NA	NA	NA	NA	NA	$ 0.69	$ 0.86	NA
	LC	140	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Net kWh	NA	NA	NA	NA	NA	$ 0.82	$ 1.01	NA
	LC	141	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Gross kW	NA	NA	NA	NA	NA	$ 6,430.04	$ 7,741.13	NA
	LC	142	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - PAC	$PAC/Lifecycle Net kW	NA	NA	NA	NA	NA	$ 7,575.76	$ 9,676.42	NA
	LC	143	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Gross kWh	NA	NA	NA	NA	NA	$ 0.69	$ 0.86	NA
	LC	144	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Net kWh	NA	NA	NA	NA	NA	$ 0.82	$ 1.01	NA
	LC	145	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Gross kW	NA	NA	NA	NA	NA	$ 6,430.04	$ 7,741.13	NA
	LC	146	Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC) - TRC	$TRC/Lifecycle Net kW	NA	NA	NA	NA	NA	$ 7,575.76	$ 9,676.42	NA
Use of whole building metered data to estimate savings	N1	147	INDICATOR - Fraction of total projects utilizing Normalized Metered Energy Consumption (NMEC) to estimate savings	%	NA	NA	NA	NA	NA	NA	NA	NA
	N2	148	INDICATOR - Fraction of total savings (gross kWh) derived from NMEC analysis	%	NA	NA	NA	NA	NA	NA	NA	NA
Program Satisfaction	CS	149	INDICATOR - Improvement in customer satisfaction	%	NA	NA	NA	NA	NA	NA	NA	NA
	TS	150	INDICATOR - Improvement in trade ally satisfaction	%	NA	NA	NA	NA	NA	NA	NA	NA
Investment in energy efficiency	F1	151	INDICATOR - Fraction of total investments made by ratepayers and private capital	%	NA	NA	NA	NA	NA	NA	NA	NA

*SoCalREN did not have any commercial sector programs 2016-2020. Proposed program is anticipated to run only for 2021-2022.

Attachment H – SoCalREN 2021 Program Level Explanation of Modifications

SoCalREN 2021 Program Level Explanation of Changes

PA justification	Third party implementer or Core	Statewide or Local	Programs to be closed with the disposition of 2021 ABAL	% change	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
Program will become a sub-program to the Residential Multifamily program	Core	Local	SCR-RES-A2-Residential Community Coordinator (RCC)	-60.00%	N/A	N/A	$ 200,000	$ 500,000	2019	N/A	N/A

PA justification	Third party implementer or Core	Statewide	Programs to be closed upon completion of commitments	% change	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
				N/A			$ -	$ -			

PA justification	Third party implementer or Core	Statewide	Programs with reduced budgets (>40% budget decrease), to continue in 2021	% change	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
Program not on track to spend approved budget for 2020	Core	Local	Public Agency NMEC Program	-76.17%	N/A	0.32	$ 650,000	$ 2,728,000	2020	N/A	N/A

PA justification	Third party implementer or Core	Statewide	Programs with enhanced budgets (>40% budget increase)	% change	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting, or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts ramp up , or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004.
A new subprogram was created - Green Path Career Program	Core	Local	Workforce Development	81.82%			$ 700,000	$ 385,000			

PA justification	Third party implementer or Core	Statewide	Programs that are new in 2021	% change	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	MM/YY program to start	MM/YY Program is due to sunset; and flag as "NEW 3P" program if program is result of 3P solicitation process per D1801004	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts ramp up , or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004
Market need- Address COVID-19 Impact	Core	Local	Kits for Kids		N/A	0.17	$ 1,500,000	$ -	Jan-21	N/A	
EE funding to supplement grant funding in order to promote efficient equipment.	Core	Local	Healthy Store Refrigeration Energy Efficiency Program (HSREEP)		N/A	0.72	$ 500,000	$ -	Jan-21	N/A	
								$ -			
								$ -			
								$ -			
								$ -			
								$ -			
								$ -			
								$ -			