



**Central California Rural Regional Energy  
Network**

# **Public Equity Program Implementation Plan**

Portfolio Administrator: Central California Rural Regional Energy Network

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## PROGRAM OVERVIEW

The CCR REN's Public Equity Program supports hard-to-reach (HTR), disadvantaged, and underserved public agencies in the Monterey Bay area (i.e., Monterey, San Benito, and Santa Cruz counties) to help them access, understand, and address their energy efficiency opportunities. The program builds on CCR REN partner organizations' existing relationships, data, and experience, bringing energy savings to public sector customers.

Table 1 shows the CCR REN Public Equity Program's approved budgets and forecasted benefits for Program Years 2024 through 2027.

*Table 1: Program Budget and Savings*

Program Budget and Savings		
1	Program Name	CCR REN Public Equity Program
2	Program ID Number	CCR-PUB-001
3	Program Implementer	CCR REN
4	Portfolio Administrator	CCR REN
5	Program Implementer Type	REN
6	Portfolio Segment	Equity
7	Total Program Budget	\$1,169,210
8	Program Budget by Year	
	2024	\$266,960
	2025	\$298,125
	2026	\$299,700
	2027	\$304,425
9	Program Duration (Start Date - End Date)	2024 - 2027
10	Total System Benefit (TSB)	-
11	(Total Program TSB and TSB by Program Year)	
	2024	-
	2025	-

Table 1: Program Budget and Savings

Program Budget and Savings		
	2026	-
	2027	-
12	CO <sub>2</sub> e (Lifecycle, First Year, Net, Gross)	
	Lifecycle Net CO <sub>2</sub> e	-
	First year Net CO <sub>2</sub> e	-
	Lifecycle Gross CO <sub>2</sub> e	-
	First Year Gross CO <sub>2</sub> e	-
13	KW (First Year, Net, Gross)	
	Net	-
	Gross	-
14	KWh (Lifecycle, First Year, Net, Gross)	
	Net Lifecycle	-
	Net (First Year)	-
	Gross (First Year)	-
15	Therms (Lifecycle, First Year, Net, Gross)	
	Net Lifecycle	-
	Net (First Year)	-
	Gross (First Year)	-
16	Program Cost Effectiveness: Total Resource Cost (TRC): (Total TRC and TRC by Year)	
	2024	-
	2025	-
	2026	-
	2027	-
	Total	-
17	Program Cost Effectiveness: Program Administrator Cost (PAC): (Total PAC and PAC by Year)	

Table 1: Program Budget and Savings

Program Budget and Savings		
	2024	-
	2025	-
	2026	-
	2027	-
	Total	-
18	Market Sector(s)	Public
19	Program Type	Non-resource
20	Delivery Type(s)	Downstream

## IMPLEMENTATION PLAN NARRATIVE

### 1. PROGRAM DESCRIPTION

The Public Equity Program provides disadvantaged, underserved, and HTR public agencies in the Monterey Bay area with access to essential resources for upgrading their facilities with energy-efficient equipment and electrifying EE measures to support decarbonization efforts. This program is categorized as an equity activity because it specifically targets public agencies that might not otherwise have the means to secure these resources.

#### Rationale

For public agencies that are HTR or serve underserved and disadvantaged communities, providing support throughout every step of the process is essential. These agencies often face numerous challenges that require immediate response, such as pandemic events, climate change-induced disasters, and earthquakes. It is crucial to equip these agencies with the resources necessary to enhance and strengthen their facilities through energy efficiency, demand response, and electrification. This support enables them to fulfill their mission of serving their communities effectively. The focus of the program is to strengthen relationships with public agency staff and elected officials by providing technical assistance to identify and scope energy efficiency projects at critical facilities

that could function as resiliency centers. This includes facilities such as libraries, schools, and community centers.

By building trust, public agencies are more open to considering and implementing energy efficiency opportunities. This facilitates more comprehensive projects in energy efficiency, demand response, and electrification, ultimately resulting in deeper energy efficiency and energy bill cost savings. Additionally, highlighting successes to senior staff and elected officials are a key aspect of the program. This focus fosters knowledge transfer among public agencies and helps create an understanding among policymakers that energy efficiency can provide significant value and savings, not only for the agencies themselves, but also for the community at large.

These public agencies face several barriers when exploring energy efficiency opportunities in their facilities, including a lack of funding, limited staff capacity, and insufficient understanding of available resources. The CCR REN Public Equity Program addresses these barriers, acknowledging that the needs and interests of each public facility can vary, ensuring equitable access to resources.

The program's objectives include increasing energy savings, encouraging public agency participation in existing resource acquisition and financing programs (such as local government partnerships and the GK-12 program), and helping to secure competitive state and federal grants.

To achieve these objectives, it is essential to support public agencies at every stage of the process. These agencies frequently encounter urgent challenges like pandemic events, climate change-induced disasters, and earthquakes. Equipping agencies with the necessary resources to strengthen and enhance their facilities through energy efficiency, demand response, and electrification is vital for their success in serving their communities.

#### Program Goals and Objectives

The goals of the Public Equity Program are designed to support public agencies on their energy journeys in partnership with existing investor-owned utility programs, such as the local government partnerships and the GK-12 program. Each agency is at a different point in its journey, and this program is designed to assist them in taking the next step forward, whatever that may be.

A key component of this program is to help agencies identify opportunities, locate potential external funding sources, and provide technical assistance to scope projects that qualify for funding. This support is available for individual public agencies as well as for multiple agencies collaborating on regional projects that involve multiple facilities.

The Central California Rural REN Public Equity Program has three main goals:

- **GOAL 1:** Establish deep trust with public agency staff through engagement, outreach, and technical assistance.
- **GOAL 2:** Build capacity for agencies to access state and federal funding by fostering innovative and collaborative partnerships.
- **GOAL 3:** Celebrate the achievements in energy efficiency and electrification at public facilities.

The program objectives are designed to support public agency partners on their energy journey and prepare them to participate in the Central California Rural REN financing program, IOU EE and Demand Response programs, and state and federal grant opportunities.

- **OBJECTIVE 1:** Facilitate knowledge transfer among public agencies,
- **OBJECTIVE 2:** Support public agency projects focused on energy efficiency, demand response, and electrification to achieve deeper energy savings and implement more comprehensive energy efficiency tactics.
- **OBJECTIVE 3:** Foster a shared understanding among rural public agencies of the significant benefits that energy efficiency can provide to communities.

## 2. PERFORMANCE TRACKING

Table 2 below presents the program's performance targets.

*Table 2: Performance Targets*

Program Year	M1 Equity public customer served	I1: Number of projects technical assistance was provided	I2: Projects referred to other programs	I3: Number of external funding applications submitted
2025	15	5	5	1
2026	20	5	5	2
2027	20	5	5	2
Totals	55	15	15	5

### 3. PROGRAM DELIVERY AND CUSTOMER SERVICES

The program builds trusting relationships with public agency staff and elected officials, which is essential for achieving program goals and objectives. Establishing strong relationships with public agency personnel leads to greater identification of opportunities and ensures that these agencies are ready, willing, and able to address energy efficiency opportunities. This preparation also enables them to access external funding for these projects.

This approach facilitates energy efficiency, demand response, and electrification projects with public agencies, leading to deeper savings and more comprehensive energy efficiency adoption. Additionally, sharing these successes with senior staff and elected officials fosters knowledge transfer among public agencies. It also helps create an understanding at the policymaker level that energy efficiency can provide significant value and savings, not only to agency facilities but also for the broader community.

Key market participants include staff from public agencies and local elected officials. This program builds on the role that regional governments play within their territories, serving as a trusted point of contact and a reliable source of information across multiple agencies. By leveraging existing trust and relationships, the program reaches customers in innovative ways, helping them engage with energy efficiency opportunities. This, in turn, enhances the ability to meet public agency infrastructure needs through an energy efficiency perspective.

Tailored education and outreach approaches are particularly important for this program because strategies that work in one jurisdiction may not be effective in another. Each public agency possesses unique capabilities and synergies between departments and staff members, which must be considered to achieve success. Therefore, while the program relies on a common design and branding, the delivery method--and more importantly, the acceptance of the program by each agency--is unique.

The program targets public agency is located in Monterey, San Benito, and Santa Cruz counties. The primary audience includes cities, counties, school districts, and special districts.

Efforts initially are focused on the hardest-to-reach agencies, followed by those that serve disadvantaged and underserved populations, as well as agencies that are actively



working to build capacity and incorporate energy efficiency into their capital improvement processes.

This approach is rooted in a fundamental ideal of the Central California Rural REN: that all agencies, regardless of size, deserve the opportunity to be served. Additionally, it recognizes that if a program is designed to succeed in the smallest, most rural, disadvantaged, and HTR of communities, it can effectively overcome most barriers to serve all other customers as well.

#### 4. PROGRAM DESIGN AND BEST PRACTICES

The program addresses two primary barriers: access and time. In a 2019 survey of local governments (cities and counties) in the San Joaquin Valley, San Luis Obispo County, and the High Desert region of eastern San Bernardino County, public agencies were asked, “Thinking about your time, would you rather develop your own personal skills and capacity in EE and project management or rely on a no-cost expert to support EE planning and project management?” Remarkably, 100% of respondents indicated they would prefer to rely on an outside expert.

When asked about their motivations for completing EE projects, 100% of the respondents cited “cost savings for my agency” as their top reason. Additionally, the survey revealed that 60% of respondents preferred in-person one-on-one meetings, check-in calls, and group meetings.

Public agencies across rural California encounter very similar barriers, and the results of the 2019 survey are relevant to the agencies in Monterey, San Benito, and Santa Cruz Counties. With this understanding, the program utilizes data to determine how each participating agency can be connected to external programs. A key goal of the program is to help each agency access resources tailored to their specific needs.

For some agencies, this may involve introductions to market support, financing, and incentive programs, while for others, it could mean providing technical assistance and presenting at a board meeting. By customizing the approach for each agency and acting as an expert advisor to their staff, this program fosters positive energy efficiency outcomes for every participating customer.

The approach to connecting with external programs or funding sources vary based on how each program is organized to interact with the CCR REN. However, the CCR REN partners have established strong working relationships with third parties in the open

market. They are confident in the program's potential to cultivate future partnerships that align with public sector goals.

Economic downturns significantly affect public agencies, hampering their ability to collect tax revenue for their General Funds. Unlike commercial businesses, local governments cannot increase their income and are, therefore, dependent upon the economic health of their communities. This reliance is particularly challenging due to economic, health, and climate-related shocks. Small rural communities tend to be hit harder and often recover more slowly than urban areas.

Most public agencies rely on capital improvement programs (CIP) to determine which capital projects to implement each year. Since the need for projects often exceeds available funding, scoring criteria are commonly used to prioritize these projects. Unfortunately, the energy savings associated with each project are often not calculated, leading to the undervaluation of energy efficiency within the CIP processes, even though cost-effectiveness is a key consideration.

This program remedies this situation by providing technical analysis for projects included in the agency's CIPs, along with essential critical energy savings calculations. This enables elected officials to make more informed decisions by understanding the benefits each project could bring. To achieve a more integrated and comprehensive approach, it is crucial to have a complete view of an agency's energy portfolio. Therefore, this program utilizes both existing and new data to help public agencies gain a holistic understanding of their energy portfolio and connect the opportunities within their energy infrastructure to their capital improvement planning.

One of the barriers to integrating energy efficiency into the process of public agencies is that training opportunities for staff have not been tailored to address local concerns or meet the specific needs of the agency. As a result, after attending webinars, classes, or receiving program materials, staff often find it difficult to build projects and take advantage of available incentives. There is currently no effective way to incorporate energy efficiency into routine equipment maintenance, repair, and replacement practices.

To address this issue, the program leverages existing resources from other administrators and programs, including those provided by non-utility program administrators to help

public agency staff implement energy efficiency solutions. Additionally, the program provides technical assistance to ensure that identified opportunities can be fully realized.

## 5. INNOVATION

This program is building upon the ongoing regional collaboration efforts in Monterey Bay to identify and pursue climate initiatives. The goal is to aggregate these initiatives at the regional level and develop regional projects that are more competitive for external state and federal funding. This approach has proven successful in other sectors, and this program looks to apply the same strategy to fund energy efficiency improvements in public facilities.

An example of this approach is the Monterey Bay Regional Climate Project Working Group, which successfully leveraged an initial grant of \$150,000 from a CCA and annual contributions of \$10,000 from five member agencies to secure a \$15 million grant for electric vehicle charging infrastructure at ten public agencies across 44 sites.

## 6. PILOTS

Not applicable.

## 7. WORKFORCE EDUCATION AND TRAINING

Not applicable.

## 8. WORKFORCE STANDARDS

Not applicable.

## 9. DISADVANTAGED WORK PLAN

Not applicable.

## 10. MARKET ACCESS PROGRAMS

Not applicable.

## 11. ADDITIONAL INFORMATION

Not applicable.

## SUPPORTING DOCUMENTS

### 12. PROGRAM MANUALS AND PROGRAM RULES

#### 1.1 ELIGIBLE MEASURES AND MEASURE ELIGIBILITY

This program does not offer any measures. Not applicable.

#### 1.2 CUSTOMER ELIGIBILITY REQUIREMENTS

Public agencies that qualify as HTR and/or serve communities that qualify either as Disadvantaged or Underserved.

#### 1.3 CONTRACTOR ELIGIBILITY REQUIREMENTS

Not applicable.

#### 1.4 UPSTREAM AND MIDSTREAM PARTNERS

Not applicable.

#### 1.5 ADDITIONAL SERVICES

Not applicable.

#### 1.6 CUSTOMER SITE SURVEYS

Not applicable.

#### 1.7 PROGRAM QUALITY ASSURANCE PROVISIONS

##### Quality Assurance

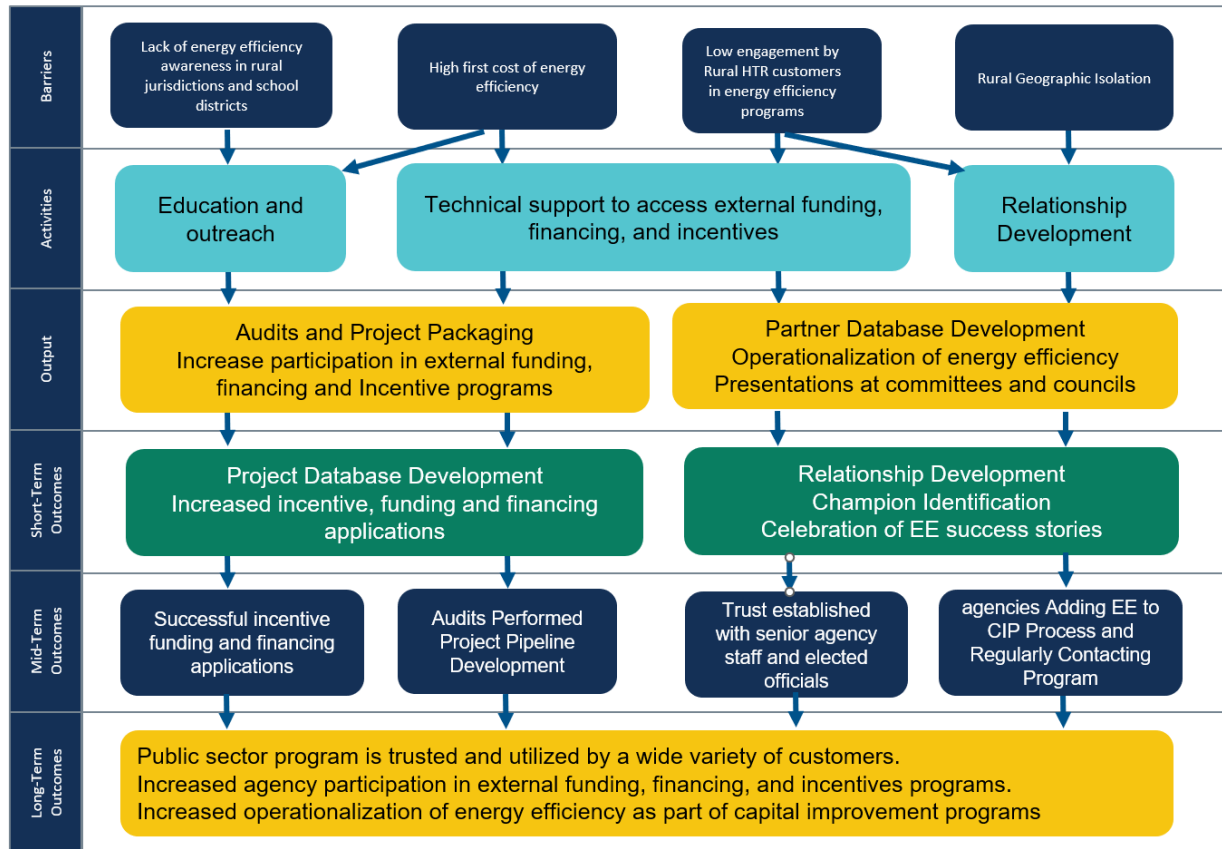
- **Customer Eligibility:** Use pre-qualification checklists to ensure customer eligibility is confirmed.
- **Equity Qualifications:** Confirm that a qualified customer is further identified as HTR, Underserved, and/or serving Disadvantaged Communities, as defined by the CPUC.
- **Technical Assistance:** Identify and confirm the technical assistance the program provides. Verify documentation supporting the technical assistance services.
- **Project Referrals:** Review and confirm that customer project referrals were completed by the program for the customer.
- **External Funding Applications:** Review and confirm external funding applications completed on behalf of the customer(s).

## 1.8 OTHER PROGRAM METRICS

Not applicable.

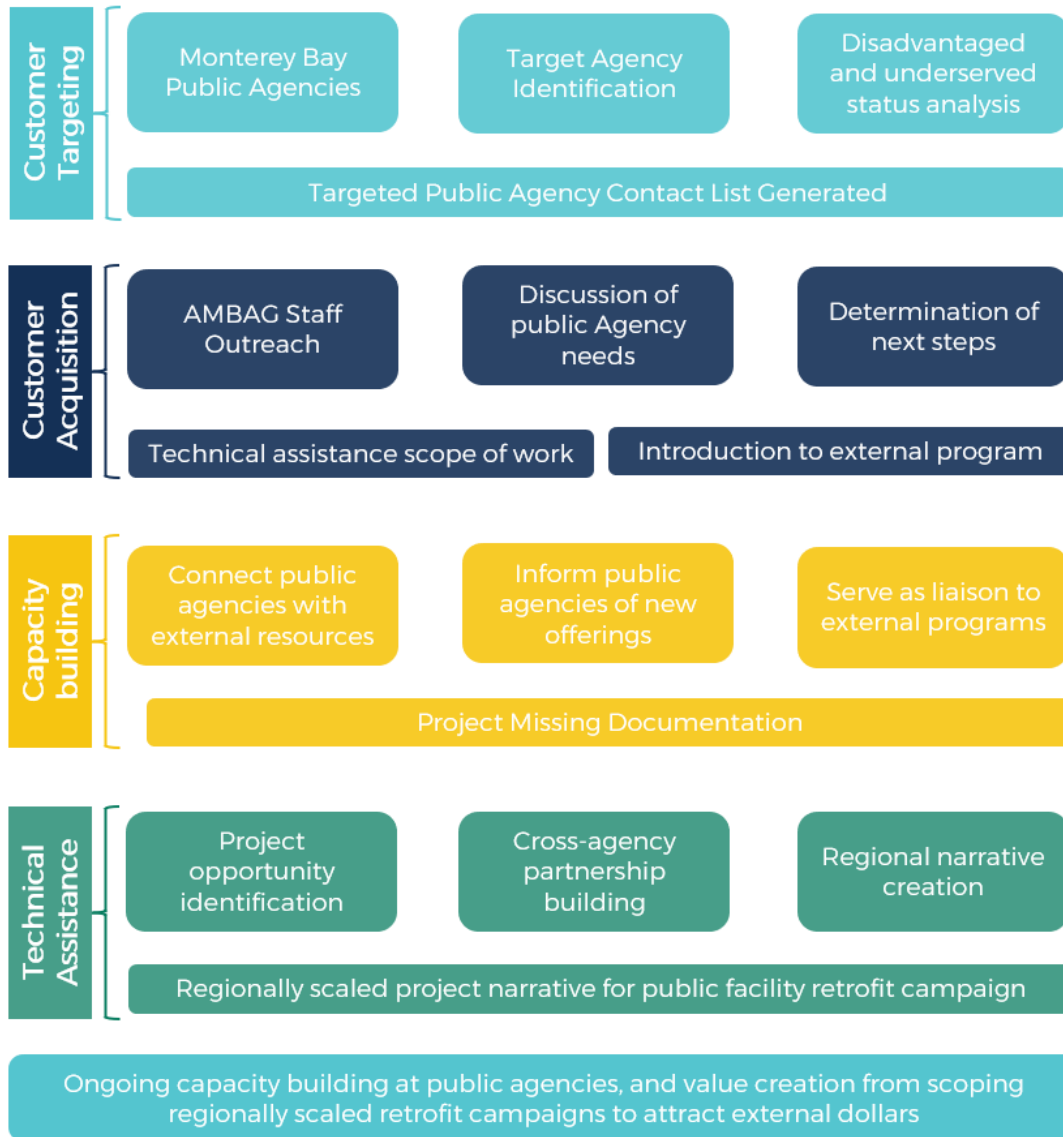
## 13. PROGRAM THEORY AND PROGRAM LOGIC MODEL

Figure 1: Program Theory and Logic Model



## 14. PROCESS FLOW CHART

Figure 2: Process Flow Chart

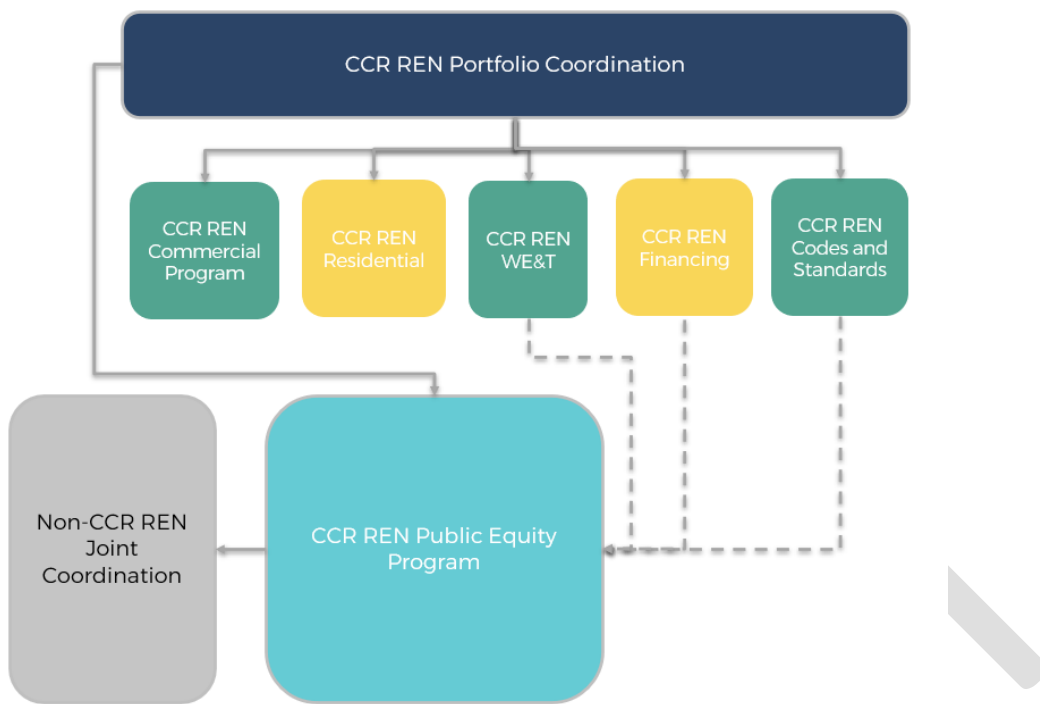


## 15. MEASURES AND INCENTIVES

Not Applicable

## 16. DIAGRAM OF THE PROGRAM LINKAGES

Figure 3: Program Linkages



## 17. PROGRAM MEASUREMENT & VERIFICATION (M&V)

Data collection activities are embedded in the program design to capture the information necessary to meet evaluation requirements and to expand the understanding of the participating public agencies.

A database will be used to track information about the participating public agencies, including EE project opportunities, referrals to other programs, and external funding opportunities as presented in Table 3. All data collected will be available for process evaluation upon request by the CPUC.

*Table 3: M&V Timeline, Actions, and Key Performance Indicators*

Timeline	Action	Key Performance Indicators
Monthly	Review program progress, discuss emerging barriers, and deploy optimizations.	<ul style="list-style-type: none"> <li>Number of public agencies' touchpoints</li> <li>Number of agencies referred to external programs</li> <li>Number of opportunities being supported</li> </ul>
Quarterly	Review program progress in the past quarter, discuss trends and	<ul style="list-style-type: none"> <li>Representation of public agencies in statewide meetings</li> </ul>

Timeline	Action	Key Performance Indicators
	opportunities, and explore pathways to educate public customers.	<ul style="list-style-type: none"> <li>Opportunity tracking of external funding sources</li> </ul>
Annual	Review program progress in the past year, compare achievements to program goals	<ul style="list-style-type: none"> <li>Compare forecast to delivered metrics and indicators</li> </ul>

## DATA COLLECTION STRATEGIES

The Public Equity Program uses the following data collection strategies embedded in the program design to support near-term feedback and internal performance analysis. All data collected will also be retained to support the CPUC's future process evaluation studies.

1. The use of a secure CRM Solution and file transfer protocol to store and share all contact information to ensure accurate tracking of program relationships and customer contacts
2. The use of a project tracking spreadsheet to analyze a project where technical assistance was provided.

## PERFORMANCE METRICS

The program will track and report on its key performance metrics as presented in Table 2, Performance Targets.

### 18. NORMALIZED METERED ENERGY CONSUMPTION (NMEC) PROGRAM M&V PLAN

Not applicable.

### 19. MULTI-DER IDSM PILOTS

Not applicable.

### 20. SEM PROGRAMS ONLY

Not applicable.