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Advice No. 5822

(Southern California Gas Company – U 904 G)

Advice No. 4519-E

(Southern California Edison Company – U 338 E)

Advice No. 14-E-G

(Southern California Regional Energy Network – #940)

Public Utilities Commission of the State of California

Subject: 2022 Joint Cooperation Memorandum (JCM) of SoCalGas, SCE, and SoCalREN Pursuant to Decision (D.) 18-05-041

Purpose

Southern California Gas Company (SoCalGas), on behalf of Southern California Edison Company (SCE) and Southern California Regional Energy Network (SoCalREN) hereby submits to the California Public Utilities Commission (Commission or CPUC) the 2022 Joint Cooperation Memo (JCM), as shown in Attachment A, pursuant to Ordering Paragraph (OP) 38 of Decision (D.) 18-05-041.

Background

On June 5, 2018, the Commission issued D.18-05-041 which adopted the Energy Efficiency Business Plans of Investor-Owned Utilities (IOUs) and Non-IOU Program Administrators (PAs) for the years between 2018 and 2025. D.18-05-041 acknowledged the potential overlaps between IOU PAs and non-IOU PAs and directed PAs with overlapping service areas to submit annual JCMs that show how the PAs would avoid or minimize duplication for programs that address a common sector in overlapping service territories. Specifically, OP 38 of D.18-05-041 directed the IOU PAs and Non-IOU PAs to submit their first annual JCMs for approval via Tier 2 Advice Letters (AL) no later than August 1, 2018, and subsequent annual JCMs for

approval via Tier 2 AL no later than June 15 prior to submitting their Annual Budget Advice Letters (ABAL).

2022 Joint Cooperation Memo

Attachment A of this AL contains the 2022 JCM between SoCalGas, SCE, and SoCalREN. The JCM provides (1) a summary of SoCalREN's program compliance with D.12-11-015; (2) a summary of the IOU PAs' 2022 comparable program offerings, if applicable; (3) a summary of all the programs SoCalREN intends to run and indicates which programs may overlap with SoCalGas and SCE; and (4) a summary of the coordination efforts between SoCalREN, SoCalGas, and SCE.

The Joint PAs make note that the budgets and programs outlined in this memo are the best estimates of 2022 offerings at the time of submittal and are not assumed to be approved. Programs and budgets will be reviewed and approved as part of the ABAL.

Protests

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

CPUC Energy Division
Attn: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102

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

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And

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Managing Director, Regulatory Relations
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Effective Date

SoCalGas believes this submittal is subject to Energy Division disposition and should be classified as Tier 2 (effective after staff approval) pursuant to General Order (GO) 96-B. SoCalGas respectfully requests that this submittal be approved on July 15, 2021, which is 30 calendar days from the date submitted.

Notice

A copy of this AL is being sent to SoCalGas' GO 96-B service list and the Commission's service list in R.13-11-005 and A.17-01-013. Address change requests to the GO 96-B service list should be directed via e-mail to Tariffs@socalgas.com or call 213-244-2837. For changes to all other service lists, please contact the Commission's Process Office at 415-703-2021 or via e-mail at Process_Office@cpuc.ca.gov.

/s/ Joseph Mock
Joseph Mock
Director – Regulatory Affairs

Attachments



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.:

Utility type:

- ELC GAS WATER
 PLC HEAT

Contact Person:

Phone #:
E-mail:
E-mail Disposition Notice to:

EXPLANATION OF UTILITY TYPE

ELC = Electric GAS = Gas WATER = Water
 PLC = Pipeline HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #:

Tier Designation:

Subject of AL:

Keywords (choose from CPUC listing):

AL Type: Monthly Quarterly Annual One-Time Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #:

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL:

Summarize differences between the AL and the prior withdrawn or rejected AL:

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:

No. of tariff sheets:

Estimated system annual revenue effect (%):

Estimated system average rate effect (%):

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:

Service affected and changes proposed¹:

Pending advice letters that revise the same tariff sheets:

¹Discuss in AL if more space is needed.

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:

CPUC, Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102
Email: EDTariffUnit@cpuc.ca.gov

Name:
Title:
Utility Name:
Address:
City: State:
Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

Name:
Title:
Utility Name:
Address:
City: State:
Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

ATTACHMENT A

Advice No. 5822

**SoCalREN, SCE, and SoCalGas
2022 Joint Cooperation Memorandum**

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

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

The SoCalREN, SCE, and SoCalGas’ (hereinafter referred to as the “Joint PAs”) 2022 portfolio will continue to focus on collaboration with respect to the Joint PAs’ overlapping programs. As part of the Joint PAs’ focused transition to performance-based and comparatively cost-effective and cost-efficient 2022 portfolios, the Joint PAs will be continuing to collaborate to ensure that their respective overlapping regional programs do not result in unnecessary duplication or cause customer confusion. PAs can derive additional value by providing information and referrals to programs across all program implementers, including those outside each other’s implementation focus.

In addition, the Joint PAs will use 2022 to continue to conduct ongoing performance assessments, introduce program administrative and implementation adjustments to reduce costs and increase energy savings, and optimize performance of all their portfolios.

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

II. SUMMARY OF SOCALREN PORTFOLIO OF PROGRAMS OFFERED FOR 2022 AND COMPARABLE PARTNER IOU 2022 PROGRAMS

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

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

In addition, the SoCalREN Multifamily Program utilizes a collaborative approach that provides direct account management services to participating program contractors. This includes regular communication through various channels (e.g., conference calls, emails), as well as intensive follow-up to develop project scopes and facilitate project completion. SoCalREN also utilizes a multi-industry profession project delivery approach that a "turn-key contractor model" with the goal of achieving higher levels of energy savings through comprehensive projects.

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

Addition of A Multi-language SPOC

In mid-year 2020, SoCalREN acknowledged that in-person workshops or outreach would not be viable in the current EE market due to Covid-19 dangers and protocol. SoCalREN formally closed the Residential Community Coordinator (RCC) program due to the program's original strategies regarding "in-person" engagement, and community workshops outreach. 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.

However, SoCalREN believed there still existed 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. In 2021, SoCalREN rolled into its existing Multifamily Program the RCC Multilanguage SPOC as a sub-strategy and the supporting multi-language tools. By moving the value-added multi-language strategies and SPOC into the current Multifamily Program, the SoCalREN has realized administrative efficiencies and eliminated non-viable strategies in the current market. Specifically, strategies that no longer are feasible given the current pandemic. Most importantly, these sub-strategies have been key to reaching small MF property owners and hard-to-reach customers that English is not their primary language.

1. Summary of SoCalREN’s Program Objectives

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

2. Summary of Program Differentiation

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

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

Program Parameters	SoCalREN	SCE Willdan Third-Party Program	SoCalGas
Target Audience(s)	<ul style="list-style-type: none"> · Multifamily property owners within SoCalREN Territory; · HTR-Multifamily property owners - Primary language spoken is a language other than English; · Multifamily property owners within DACs/DAC Communities. 	<ul style="list-style-type: none"> · Property owners and managers of existing multifamily properties within SCE’s service area. The program targets all levels of multifamily buildings (i.e., low-income, affordable-to- moderate income, market-rate), including those located in DACs. 	<ul style="list-style-type: none"> · Property owners and managers within the SoCalGas territory who seek to make energy-efficient upgrades to their properties while making well-informed decisions regarding cost and investment for the future. · Low income, affordable-to- moderate income, and market rate are eligible to participate. · Property owners of multifamily complexes within DAC/DAC communities .
Program Delivery Approach	<ul style="list-style-type: none"> · Whole Building · Common Area 	<ul style="list-style-type: none"> · Measure 	<ul style="list-style-type: none"> · Whole Building
Differentiating Programmatic Features	<ul style="list-style-type: none"> · 60% Incentive Cost- Cap · 75% Incentive Cost- Cap for DACs/HTR · Tiered Incentive Structure · Utilizes a multi-industry project delivery approach · Offers Program with Partner Gas Muni’s · Multi-language SPOC 	<ul style="list-style-type: none"> · Provides customers choice of incentive, financing, and/or services. · Full-service building approach delivered through Trade Pros and Community-based Organization networks specializing in MF segment · Integrated delivery team provides comprehensive services · Intelligent outreach using proprietary software and modeling · Simple, customer-friendly offer providing customers choice of financing, technical assistance, and flexible incentives. 	<p>The program will implement maximum incentive levels based on the type of property.</p> <ul style="list-style-type: none"> · Market Rate Projects will be incentivized up to 50% of total project cost. · Affordable Projects can be incentivized up to 65% project cost. To qualify for the Affordable Incentive Path, a project must be classified as a Disadvantaged Community (DAC) or Hard to Reach (HTR). Additionally, projects that meet the Energy Savings Assistance program (ESA) guidelines are also eligible for the Affordable Incentive path. <p>Four incentive tiers are available.</p>

Resource or Non-Resource	Resource	Resource	Resource
Eligible Measures	The program offers a variety of deemed incentives for energy-efficiency measures for both common and dwelling areas of multifamily properties. Eligible measures include: Appliances, HVAC, Lighting, Pumping, and Water Heating.	The program offers deemed, customized calculated, and NMEC-based site specific approach measures for energy-saving equipment for both common and in-unit areas of multifamily properties; end uses include HVAC and Lighting, and Water Heating.	Home Upgrade Program-Multifamily Whole Building Program promotes long-term energy benefits through comprehensive EE retrofit measures - including building shell upgrades, high-efficiency HVAC units, central heating and cooling systems, central domestic hot water heating, and other deep energy reduction opportunities.
Budget³	\$7,000,000	\$6,300,000	\$2,361,124

Similar to the SoCalGas Multifamily Whole Building Program that is currently offered to customers, SoCalREN’s multifamily projects must install at least three EE measures. However, SoCalREN’s Multifamily Program currently only offers a \$5,000 assessment incentive, which is paid in two installments to participating raters (\$2,500 when assessment is submitted and \$2,500 upon project completion. SoCalREN’s Multifamily program includes a 60% total project incentive cost-cap for non-DAC/HTR (75% total project incentive cost-cap for DAC/HTR) multifamily properties.

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

SoCalGas’s Multifamily Whole Building Program has an incentive cost-cap of 50% of total project cost for Market Rate Properties and 65% for properties deemed as Affordable Projects; SoCalGas also promotes its On Bill financing Program (OBF) to be bundled in all projects eligible. SCE’s Multifamily Program utilizes a different approach, offering financing, engineering services, and/or incentives for deemed, calculated, and/or NMEC approach EE measures energy-saving

products for both common and dwelling areas of multifamily properties. There are no whole building requirements in SCE's Multifamily Program.

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

³ The budgets provided herein are estimates. Final 2022 budgets will be provided in the PAs' Annual Budget Advice Letters that will be filed on September 1, 2021

Table 2: Multifamily Program Comparison

Program Parameters	SCR Multifamily Program	SCE Willdan Multifamily Program	SCG - under the HUP umbrella
Project Delivery Model	Program team and Contractors identify project opportunities and work with program engineers to assess current property conditions and identify project scope. Incentive opportunity and financing options are presented to the customers. Contractor then completes project installation based upon the agreed scope of work. Engineering team models energy savings in EnergyPro and incentive is paid based on savings.	Measures are implemented through contractors or customers may also choose to self-install or select contractor of choice for all incentivized measures.	All projects go through SoCalGas Consultant for review. Consultant provides technical and program assistance to encourage customers to add measures to their scope of work and educate them on the energy savings achieved. Customers install the agreed upon set of measures through the installer of their choice.
Minimum Energy Savings Required per Project	10% (electric and gas savings)	N/A	5% (gas savings)
Minimum Number of Measures	3 measure minimum. must include both electric and gas efficiency measures	1 measure	3 measure minimum and must include a core measure (installation of a major capital improvement).
Minimum Number of Dwelling Units	5 units	10 or more units	3 units
Deemed vs Calculated	Calculated	Deemed, Calculated, NMEC-Based Site Specific Approaches	Measures are calculated using a combination of energy modeling results and ED approved workpapers or custom calculations. Energy models are calibrated when possible to historical energy use.
Program Delivery Approach	Whole Building	Measure	Whole Building

Program Parameters	SCR Multifamily Program	SCE Multifamily Program	SCG - under the HUP umbrella																																																										
Total Incentive Project Cost-Cap	60% non-DAC properties 75% DAC/HTR properties	None	50% Market Rate 65% Affordable (DAC, HTR, ESA qualified).																																																										
Assessment Structure	The program is currently offering an assessment payment of \$5,000 for assessments. \$2,500 paid when assessment is submitted and approved and \$2,500 paid when improvement is completed and approved. In 2019, assessment incentive increased and is only paid on project completion to ensure project conversion rate increases (similar to PG&E).	SCE Third Party Contractor provides assessment as well as technical assistance and recommendations to assist customer and or customer's contractor	SoCalGas Consultant and program SPOC provides assessment as well as technical assistance and recommendations to assist customer and or customer's contractor.																																																										
Improvement Incentive Structure	<p>Program Tiered</p> <table border="1" data-bbox="423 961 732 1205"> <thead> <tr> <th>Energy Savings Achieved per site</th> <th>Incentive Per Dwelling Unit</th> <th>Energy Savings Achieved per site</th> <th>Incentive Per Dwelling Unit</th> </tr> </thead> <tbody> <tr><td>10%</td><td>\$550</td><td>21%</td><td>\$913</td></tr> <tr><td>11%</td><td>\$583</td><td>22%</td><td>\$946</td></tr> <tr><td>12%</td><td>\$616</td><td>23%</td><td>\$979</td></tr> <tr><td>13%</td><td>\$649</td><td>24%</td><td>\$1,012</td></tr> <tr><td>14%</td><td>\$682</td><td>25%</td><td>\$1,045</td></tr> <tr><td>15%</td><td>\$715</td><td>26%</td><td>\$1,078</td></tr> <tr><td>16%</td><td>\$748</td><td>27%</td><td>\$1,111</td></tr> <tr><td>17%</td><td>\$781</td><td>28%</td><td>\$1,144</td></tr> <tr><td>18%</td><td>\$814</td><td>29%</td><td>\$1,177</td></tr> <tr><td>19%</td><td>\$847</td><td>30%</td><td>\$1,200</td></tr> <tr><td>20%</td><td>\$880</td><td></td><td></td></tr> </tbody> </table>	Energy Savings Achieved per site	Incentive Per Dwelling Unit	Energy Savings Achieved per site	Incentive Per Dwelling Unit	10%	\$550	21%	\$913	11%	\$583	22%	\$946	12%	\$616	23%	\$979	13%	\$649	24%	\$1,012	14%	\$682	25%	\$1,045	15%	\$715	26%	\$1,078	16%	\$748	27%	\$1,111	17%	\$781	28%	\$1,144	18%	\$814	29%	\$1,177	19%	\$847	30%	\$1,200	20%	\$880			Customer's choice of incentive, financing, and/or services as agreed upon between Customer and Third-Party Contractor.	<p>Incentives are tiered based on percent improvement in site gas energy use, and multiplied times the number of units in the property. Total amount cannot exceed corresponding caps for Market Rate or Affordable projects.</p> <p>Energy Efficiency Incentives The incentive amount corresponds to the level of energy efficiency achieved.</p> <table border="1" data-bbox="1073 1367 1390 1465"> <thead> <tr> <th>Natural Gas Savings*</th> <th>Incentive Per Dwelling Unit**</th> </tr> </thead> <tbody> <tr><td>7%</td><td>\$400</td></tr> <tr><td>10%</td><td>\$570</td></tr> <tr><td>12%</td><td>\$800</td></tr> <tr><td>15%</td><td>\$750</td></tr> </tbody> </table>	Natural Gas Savings*	Incentive Per Dwelling Unit**	7%	\$400	10%	\$570	12%	\$800	15%	\$750
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Program Parameters	SCR Multifamily Program	SCE Multifamily Program	SCG - under the HUP umbrella
CAS Testing Requirements	CAS testing required; all critical issues to be fixed prior to submitting for payment of the Assessment and all other corrections must be completed prior to submissions of the improvement incentive so that corrections can be integrated into the scope of work.	None	Requires diagnostic “test-in” and “test-out” whole house assessments. The “test-in” assessments will generate a comprehensive work scope and the “test-out” assessments will be used to document that specified improvements have been properly sized and installed
Documentation Required	ASHRAE Level 2 assessment report, EnergyPro simulations files, building sketch, Multifamily CAS workbook documenting CAS results, job and building information, proposed scope of work.	Verification of EE measure eligibility, approved workpaper (for Deemed measures), Pre-Installation Inspection Report and/or Post-Installation Inspection Report, and Early Screening Document, and Project Feasibility Study (for Calculated and NMEC measures).	Paid itemized sales receipt, contractor invoices, paid home improvement contracts, permit closure, product cut sheets, savings calculations workbook generated by consultant, and application forms (Investment Grade Energy Audit Request Form, Energy Audit Report, Energy Report with recommended improvements and cost).
Project Measures Incentivized	Gas/water/electric measures (please see eligible measure list)	Lighting, HVAC, Water Heater, and other technologies	All typical gas EE measures are eligible assuming savings can be modeled according to ED guidelines for whole building programs (EP5 simulation engine or outside calculations). No generation measures are eligible (solar thermal, solar PV). No fuel switching measures are eligible.

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

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

The Multifamily Whole Building Program seeks deeper energy savings through a comprehensive approach and provide guidance to customers across all their portfolios, while addressing the energy needs specific to each property. The program collaborates with customers' contractors/installers to address specific opportunities at any given property and develop achievable installation timelines. The program targets property owners/managers with scheduled project rehabilitation who are willing to invest in a performance-based whole-building approach. This performance-based approach aims to assist property owners and managers with making informed decisions, identify measures for energy savings, and maximize energy reductions for each property owner, manager, and tenant, as applicable. The incentives are designed to influence the implementation of comprehensive measures, and therefore are based on gas energy reduction achieved.

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

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

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

comprehensive approach.

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

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

The two Third Party Programs offered are as follows:

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

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

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

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

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

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

The SCE Willdan Multifamily Third-Party Program serves the entire Multifamily (MF) segment of the Residential sector. It complies with Southern California Edison (SCE) and California Public Utilities Commission (CPUC) requirements and offers a consolidated approach that includes segment-specific marketing, technical assistance, technologies, whole-facility opportunities, financing, and measurement and verification (M&V). Integrated Demand Side Management (IDSM) and electrification upgrades are offered to customers, excluding any storage technology. This approach minimizes the barrier of customer confusion, unlike the existing siloed programs. Energy efficiency

(EE) / IDSM upgrades are delivered with a full-service, pay-for-performance approach.

The program will offer a full-service building approach to MF properties throughout the SCE territory. The new MF program will offer a single point of contact (SPOC) and with a significant share of program services provided through open trade pro & community-based organization (CBO) networks, local contractors, and subcontractors who specialize in the MF segment.

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

The program delivers increased savings through comprehensive multi-technology solutions. An integrated team located within SCE's service territory draws on existing customer relationships with property owners to increase the number of completed projects.

5. SCE Willdan Multifamily Third Party Program Coordination Protocol Between Programs

A focus on collaboration of the PAs is critical to all multifamily programs' successes. For its residential programs, SoCalREN and the IOUs will communicate via email or in regular coordination meetings. Joint PAs will participate in Energy Division-led Program Coordination Groups (PCG), with the goal of reaffirming clearly defined program goals and messaging.

The Joint PAs realize there is an opportunity to continue and deepen coordination to serve the multifamily segment. Coordination within multifamily programs has the potential to lead to deeper EE retrofits by combining their offerings with SoCalREN's whole-building program. The IOUs will make the SoCalREN aware of programs and resources available; including multifamily residential programs. The IOU's will provide notice once advice letters have been filed and implementation plans have been uploaded to CEDARS of any new program similar to SoCalREN's residential programs that may result from the third party solicitation process. Through SoCalREN's Residential Community Coordinator (RCC), all available information regarding all possible IOU and third-party program and incentive

opportunities will be made available so that the Joint PAs’ constituents are allotted all available options, thus gaining deeper energy savings for the state.

6. Coordination Between SW Program(s)

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

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

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

Table 3: SoCalREN’s 2022 Multifamily Program Compliance With D.12-11-015

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

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

The SoCalREN Kits for Kids program provides an energy-saving measures to families within the service area who have fourth grade students attending schools. A set of measures will be offered at no cost to participating students and their families. These no-cost measures will provide realized energy savings for each household. In addition to the energy and cost saving achieved by the student, Kits for Kids will provide educators with a classroom 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. 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.

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

1. Summary of Program Objectives

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

2. Summary of Program Differentiation

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

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

Program Parameters	SoCalREN	SCE	SoCalGas
Target Audience (s)	4 th grade students and their families residing in single and multifamily homes		

Resource or Non-Resource	Resource		
Eligible Measures	(2) LED Light bulbs (1) Showerhead (2) Faucet Aerators -1 Kitchen 1.5GPM -1 bath 1.0GPM		
Budget	\$1,200,000		

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

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

Table 5: REN and IOU Program Comparison

Program Parameters	SCR Kits 4 Kids Program	SCE	SCG
Program Delivery Approach	<p>Utilizes an interactive online game platform to inform kids about the benefits energy savings while engaging them on the installation process with the supervision of their parents;</p> <p>Program model also utilizes public agency partners specifically schools, school districts and Counties Education Offices to promote energy leadership and drive energy efficiency beyond the classrooms;</p>		
Deemed vs Calculated	Deemed		
Incentive Structure	<p>65% of Students must install measures for classroom incentive;</p> <p>Each Classroom to receive \$500 grant</p>		
Approval	<p>Postcard Installation submitted to Teacher and online platform game captures installation progress as kids/family's complete activity;</p> <p>SoCalREN to process and verify via postcard submittal/online collection;</p>		
Project Measures Incentivized	Gas/water electric measures provided but not qualified as deemed at this time		

Baseline/Data Collection	SoCalREN is leveraging this program to collect measures replaced so annually incremental estimation of attributable electric savings can be measures (i.e. CFL replacements)		
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3. Comparable SoCalGas Program – N/A

4. Coordination Protocol Between Programs – N/A

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

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

Table 6: SoCalREN’s 2022 Kits for Kids Program Compliance With D.12-11-015

REN Criteria	SoCalREN Kits for Kids Program (SCR-RES- A3)
1. Activities IOU cannot or does not intend to undertake	Kits for Kids offers and online platform for students to learn about energy efficiency
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	Will emphasize HTR customers, DAC and Rural Communities

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

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

Services include:

- ✓ Energy portfolio analysis tools and benchmarking support that help identify potential opportunities.
- ✓ Start-to-finish project management support
- ✓ Facility energy audit
- ✓ Exterior lighting retrofit audit and technical expertise
- ✓ Water and wastewater pumping and process optimization retrofits and other measures
- ✓ Retro-commissioning support
- ✓ Project financing analysis

Support in access to financing, including EE financing and grant application services

- ✓ Development of contractor scope of work elements with EE performance specifications
- ✓ Access to competitively bid specialty contractors
- ✓ Assistance with utility incentive and rebate processing
- ✓ Construction management support
- ✓ Project close-out support and training
- ✓ Access to EE tools, resources & peer-to-peer learning opportunities
- ✓ Customized support to celebrate project success

1. Summary of Program Objectives

- a) Fill market gaps in the public sector and provide public agencies with an integrated, objective, and comprehensive EE solution for their facilities and non-facility infrastructure.
- b) Increase the percentage of public agencies that engage their communities in energy actions and EE strategies, thereby reducing overall community energy consumption, with a focus on disadvantaged and HTR communities.
- c) Increase the ability of public agencies to meet local, regional, and state energy targets and policy goals.

- d) Increase the number of participating public agencies in the SoCalREN EE PDP across the entire regional territory, with an emphasis on HTR and DACs.
- e) To position public agencies and strategic regional partners to lead community awareness campaigns; engage stakeholders; build public awareness of local, regional, and state efforts; develop energy action plans with shovel ready project scopes; and drive participation in PA core resource programs.
- f) Expand the implementation of cost-effective EE projects

2. Summary of Program Differentiation

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

Table 7: SoCalREN Public Agency Energy Efficiency Project Delivery Program and IOU Partners Comparable Programs Summary

Program Parameters	SoCalREN	SCE⁶	SoCalGas⁷
Target Audience (s)	Public Agencies: <ul style="list-style-type: none"> · Cities, counties, tribes, K–12 schools, local government hospitals and hospital districts, water districts, wastewater districts, sanitation districts, ports, airports, and other special districts. 	All eligible: <ul style="list-style-type: none"> · Cities · Counties · Water/wastewater Districts · K–12 Schools · Special Districts · Tribes 	All eligible: <ul style="list-style-type: none"> · Cities · Counties · Water/wastewater Districts · K–12 Schools · Special Districts · Tribes · POUs · Any Public Agencies
Resource or Non-Resource	Non-Resource	Resource	Resource & Non-Resource
Eligible Measures	N/A	Lighting, HVAC, Process, Food Service, Whole Building, Motors, Office Equipment, Building Envelope, Refrigeration	Pipe and Tank Insulation, Boilers, Water Heaters, Pool Covers, Food Service, HVAC, Building envelope, Central Plant, Non-building or systems
Budget⁸	\$6,000,000	\$7,800,000	\$5,300,000

⁴ _____ Note: This includes active Local Government Partnership Programs and other Public Sector Programs, Public Sector HOPPs, and Water Infrastructure Systems EE Program only. However, SCE and SoCalGas do provide EE services to all public sector customers through the programs outlined in the section below. Third-party solicited program(s) may differ in the eligible measures and segments served.

⁵ Note: This includes all Public Sector programs listed in Appendix C.

⁸ The budgets provided herein are estimates. Final 2022 budgets will be provided in the PAs’ Annual Budget Advice Letters that will be filed on September 1, 2021.

SoCalREN’s EE PDP offers services customized to serve the specialized needs of public sector customers. For example, in SoCalREN’s EE PDP, project management and technical support are offered throughout the entire project lifecycle, including technical assistance, procurement assistance, construction management support, financing support, and access to actionable reports on energy data. The IOUs’ public sector technical assistance primarily focuses on project technical and financial details, but does not include detailed financial analysis, pre-OBF financing support, non-OBF financing support, procurement assistance, or construction management support. SoCalREN EE PDP participants only need to be a SoCalREN enrolled agency to be eligible to participate in the program. In 2019, after an identification of a gap was presented due to the reduction of local government partnerships, the SoCalREN added the regional partnership strategy to its EE PDP. The goal of regional partnership strategy is to increase energy efficiency impacts through enrollments, enhanced engagement, and ultimately increase EE projects and their associated savings through IOU resource program pipelines. The following table compares the key program parameters of PAs’ public sector programs.

Table 8: Public Sector Program Comparison

Program Parameters	SoCalREN: EE Project Delivery Program	SCE Public Sector Programs	SoCalGas Public Sector Programs
Types of Public Agencies Served	All eligible: <ul style="list-style-type: none"> ● Cities ● Counties ● Water/wastewater Districts ● K–12 Schools ● Special Districts ● Tribes 	All eligible: <ul style="list-style-type: none"> ● Cities ● Counties ● State Government ● Federal Government ● Water/wastewater Districts ● K–12 Schools ● Community Colleges & Universities ● Special Districts ● Tribes 	All eligible: <ul style="list-style-type: none"> ● Cities ● Counties ● State Government ● Federal Government ● Water/wastewater Districts ● K–12 Schools ● Community Colleges & Universities ● Special Districts ● Tribes ● POU's ● Any Public Agencies

Resource/ Non-resource	Non-resource	Resource	Resource and Non-Resource
Procurement Assistance	Procurement and project delivery option analysis Access and extensive support to both customized and turnkey procurement approaches for energy projects Proposal and bid analysis Development of contractor scope of work with performance specifications Contractor cost estimate review	None	None

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

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

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

SCE’s Public Sector Programs focus on four major segments: local governments (City, County, Special Districts, other Public Agencies), state government (Correctional Facilities, Hospitals, State Agencies & Departments), federal government (Military, Hospitals, Other Federal Agencies, Native American Tribes), and education (K-12, Higher Education, University Hospitals). SCE intends to meet its Public Sector goals by utilizing third-party implementers currently under solicitation for the 2022 period.

SCE’s Local Government Partnership Program provides support to local governments in SCE’s service territory to address EE opportunities in municipal facilities. A key goal of SCE’s Local Government Partnerships is helping cities and counties to lead by example by addressing EE first in their own municipal facilities through enhanced incentives for core savings projects. SCE’s Local Government Partnership Programs will continue until new third party programs begin implementation.

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

implementation.

SCE will offer a portfolio of third-party implemented programs to support Public Sector customers in 2022. SCE is soliciting new third-party programs for the Public Sector in 2021 with a goal of implementation in 2022.¹ SCE's local public solicitation is in the RFP stage with an expected selection by the end of 2021. SCE's statewide water/wastewater solicitation will be releasing RFP in Q3 2021 with an expected selection by Q2 2022. The statewide higher education solicitation is in the RFP stage with an expected selection by Q1 2022. SCE will provide notice once advice letters have been filed and implementation plans have been uploaded to CEDARS of any new program similar to SoCalREN's public programs that may result from the third-party solicitation process.

4. Comparable SoCalGas Public Sector Programs

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

In 2022, SoCalGas Public Sector Programs will transition from the 12 Local Government Partnership Programs (LGP) to a regional model (Public Sector Energy Pathways) that provides services and support to the broader public sector customers along with Public Sector Third Party programs. A Third Party implemented resource program (SCG3846) for small and medium public sector customers has been launched in 2021. This Third Party program is a turnkey cost-effective end-to-end solution for small and medium public sector customers. A Third Party program aimed at large public sector customers is currently being solicited and scheduled to launch in 2022. SoCalGas Public Sector Programs portfolio is

¹ More Information on SCE's EE third-party solicitation can be found at: <https://www.sce.com/partners/Energy-Efficiency-Solicitations>

designed to support all Public Sector customers including local governments and special districts in the following areas:

**Government and Public
Agency Facilities**

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

Sustainability Support

- ✓ Local Code Compliance & Education Support
- ✓ Local Reach Code Support
- ✓ Benchmarking
- ✓ Guiding Document Support
- ✓ Peer to Peer Support, Best Practices

Core and Third Party Program Coordination

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

SoCalGas intends to expand its EE offerings and services in 2022 to all Public Sector customers, including those Public Agencies that are not in the current LGP through a suite of new program designs, improved strategies, offerings, and services, such as EE Direct Install, Public Sector Deemed and Calculated programs and new programs resulting from the Third-Party Solicitation process. Focused or tailored local and regional solutions may be adopted to achieve Public Sector goals. SoCalGas also has partnerships with many municipal utilities to jointly design and deliver EE programs to the shared customer base.

5. Coordination Protocol Between Programs

In 2013, the Joint PAs worked closely together to produce a clear, concise project coordination strategy titled “SoCalREN-IOU Coordination Plan for Public Agencies” for SoCalREN’s Public Sector Programs. This same document will be used as the coordination protocol for the EE PD Program, DER

DAC Program, and Public Agency NMEC Program (discussed in the next sections). This plan is closely followed by all parties and lays out all coordination regarding agency enrollment, commitment, and ongoing SoCalREN project delivery services. This document is provided in Appendix E.

In addition to the SoCalREN-IOU Coordination Plan implemented by the Joint PAs, there is also a monthly "program coordination call" and monthly SCE-specific "project coordination call." The IOUs will make the SoCalREN aware of programs and resources available, including public sector programs. The IOU's will also provide notice once advice letters have been filed and implementation plans have been uploaded to CEDARS of any new program similar to SoCalREN's public programs that may result from the third-party solicitation process. Once third-party programs have been selected, the Joint PAs will work to update coordination documents.

SoCalREN coordinates with the IOUs and other relevant third-party or LGP stakeholders prior to any in-person engagement meeting to enroll a new agency. This "pre-coordination" helps to mitigate customer confusion and serves to keep all parties informed of ongoing projects. The Joint PAs will leverage this successful approach for other sectors in their 2022 portfolios.

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

6. Coordination between SW program (s)

The IOU's will also provide notice once advice letters have been filed and implementation plans have been uploaded to CEDARS for the statewide water/wastewater program(s). Once third-party program(s) have been selected, the Joint PAs will work to determine best method of coordination with the statewide water/wastewater program(s).

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

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

Table 9: SoCalREN’s 2022 EE PD Program Compliance with D.12-11-015

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

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

To further support the Public Sector and to expand on lessons learned from existing strategies utilized by SoCalREN in the Public Sector, the SoCalREN expanded its one-stop EE project delivery to include consideration of Distributed Energy Resources (DER) during EE audits and provide recommendation for the integration of DERs in implementation of EE projects. This Program is offered within DACs, rural, and low-income communities. Similar to SoCalREN’s existing Public Agency Energy Efficiency Project Delivery Program, the Distributed Energy Resource DAC Project Delivery (DER DAC PDP) sub-program will provide all customized EE project management and educational services as listed in

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

1. Summary of Program Objectives

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

2. Summary of Program Differentiation

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

Table 10: SoCalREN Public Agency DER DAC Project Delivery Program Summary

Program Parameters	SoCalREN	SCE	SoCalGas
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Target Audience (s)	Public Agencies in Disadvantaged Communities: <ul style="list-style-type: none"> · Cities, counties, tribes, local government hospitals and hospital districts, K-12 schools, water districts, wastewater districts, sanitation districts, ports, airports, and other 	N/A	N/A
Resource or Non-Resource	Non-Resource	N/A	N/A
Eligible Measures	N/A	N/A	N/A
Budget	\$2,615,000	N/A	N/A

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

Unique DER elements of this program enhancement include:

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

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

⁹ The budgets provided herein are estimates. Final 2022 budgets will be provided in the PAs’ Annual Budget Advice Letters that will be filed on September 1, 2021.

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

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

Table 11: Public Agency DER DAC Program Comparison

Program Parameters	SoCalREN DER DAC PDP	SCG/SCE Customized Program
Eligible Facilities	Buildings and Non-building facilities; e.g., exterior lighting (incl. Street lighting)	Buildings and Non-facilities
Eligible Agencies	Eligible DAC, rural, and low-income Public Agencies only	All non-residential customers
Eligible Measures	Measures that may result in energy savings, energy generation, demand response savings or water savings	Measures that deliver above-code energy savings
Technical Assistance	Benchmarking support, Project Management, Financial Analysis & Services, Incentives Support, Auditing, Procurement support, technical specifications, and construction support	Incentive application support offered by Account Executive, Public Sector Staff or Third Party implementer
Performance Payment	No monetary incentives	Monetary incentives

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

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

3. Comparable Partner Program

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

4. Coordination Protocol Between Programs

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

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

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

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

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

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

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

Under the Public Agency NMEC Projects Program, SoCalREN employs a NMEC framework and targets projects that are identified by the SoCalREN EE PDP or SoCalREN DER DAC program are limited by support and incentives through existing EE programs. This Program provides an alternative to the existing utility programs, while pursuing stranded potential in public agency facilities and buildings. This Program is a resource program, so EE savings from these projects contribute to SoCalREN program goals and cost-effectiveness calculations. The program targets DAC, rural, and low-income communities by offering increased incentives for these equity communities.

1. Summary of Program Objectives

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

2. Summary of Program Differentiation

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

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

Program Parameters	SoCalREN Public Agency NMEC Program, (SCR-PUBL-B3)	SCE Public Sector Third-Party Programs	SoCalGas High Opportunity Projects and Program - Metered and Performance-Based Retrofits (MPBR) Program
Target Audience (s)	Public Agencies: <ul style="list-style-type: none"> · Cities, counties, tribes, local government hospitals and hospital districts, water districts, K-12 schools, wastewater districts, sanitation districts, ports, airports, and other special districts. 	Public Sector	Public Sector
Resource or Non-Resource	Resource	Resource	Resource
Eligible Measures	CMPA Methodology – includes whole building retrofits and behavioral and operational savings	Design dependent on third-party solicitation outcome.	CMPA Methodology – includes whole building retrofits and behavioral and operational savings
Budget¹³	\$1,550,000	\$1,400,000	\$450,000 ¹⁴

SoCalREN will target agencies who are enrolled in the EE PDP and DER DAC EE PDP and have facilities that have not recently participated in utility programs. Participating agencies also benefit from the SoCalREN Program’s project management expertise and technical services. Similar to the partner

IOU NMEC programs, engineers with experience in ASHRAE energy savings calculation standards and International Performance Measurement and Verification Protocols (IPMVP) will be prioritized in executing NMEC projects. The SoCalREN Public Agency NMEC Program provides technical assistance, application technical review, staff training, and facility savings reports to ensure persistence of savings while adhering to CPUC NMEC Guidelines that go through the CMPA process. The SoCalREN Public Agency NMEC Program differs from the IOUs NMEC programs by providing staff training, regular savings reports post installation, and a focus on equity through the provision of enhanced incentives for equity communities.

This approach road-tests critical elements of NMEC implementation in a public agency context, such as normalized usage data and metered savings verification, as a comprehensive, whole-building approach to energy upgrades.

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

Table 14: NMEC-Based Program Comparison

Program Parameters	SoCalREN NMEC Program	SCE Public Sector Third Party	SoCalGas HOPPs Program
Eligible Facilities	Buildings	Design dependent on third-party solicitation outcome.	Buildings
Eligible Agencies	Eligible sub-segment of Public Agencies (target DACs, rural, low-income communities)	Design dependent on third-party solicitation outcome.	All Public Sector
Eligible Measures	Any measure that reduces energy usage	Design dependent on third-party solicitation outcome.	Any measure that reduces energy usage to achieve 20% savings and a minimum of 7,000 Therms

Technical Assistance	Modeling and M&V Plan, post implementation training, performance tracking and savings persistence	Design dependent on third-party solicitation outcome.	M&V Plan, facility audits, energy efficiency education related to retrofits, performance tracking and savings persistence
Measurement	CMPA (IPMVP Option C)	Design dependent on third-party solicitation outcome.	CMPA (IPMVP Option C)
Baseline	Existing conditions	Design dependent on third-party solicitation outcome.	Existing Conditions
Performance Payment	Incentives provided post-implementation measurement and verification of savings	Design dependent on third-party solicitation outcome.	Incentives provided on a post-implementation measurement of energy savings based on meter data.
Resource or Non-Resource	Resource	Resource	Resource

Program Parameters	SoCalRENMEC Program	SCE Public Sector Third-Party Program	SoCalGas HOPPs Program
Approval Process	Streamlined Process within CPUC NMEC Guidelines that will go through the CMPA	Design dependent on third-party solicitation outcome.	CPUC HOPPs Guidelines
2022 status	In the market as of April 2019, accepting new projects	Will begin accepting new projects upon approval by CPUC	Accepting new projects

3. Comparable SCE Public Sector Program – Public Sector Third-Party Program [SCE-TBD]

Projects are eligible for On-Bill Financing.

As stated in section C above, SCE offers a portfolio of third-party implemented programs to support Public Sector customers and will be soliciting new third-party programs for the Public Sector in 2021 for implementation in 2022. SCE’s local public solicitation is in the RFP stage with an expected selection by the end of 2021. While SCE does not yet know the composition of these programs, SCE will continue to work with SoCalREN to coordinate activities.

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

The SoCalGas MPBR Program assists Public Sector customers in retrofitting existing facilities and incorporating innovative monitoring-based commissioning (MBCs). The Program established a “proof of concept” that EE equipment retrofits in combination with monitoring-based commissioning of public sector buildings can achieve a higher level of cost-effective energy savings compared to traditional retrofits or retro-commissioning. Customers can streamline project implementation timelines by combining formerly separate EE actions. The MPBR Program is designed to incentivize projects to go

from an existing condition baseline to or above code in order to encourage customers to implement retrofits that they would not have completed absent the Program incentive. These incentives are provided both on a pre- and post-measurement of energy savings. In support of participants employing a whole- building retrofit, the program offers other non-resource benefits such as facility audits, technical assistance, and EE retrofit education.

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

5. Coordination Protocol Between Programs

As part of the Public Sector program coordination call, SoCalREN, SCE, and SoCalGas program teams will discuss marketing campaigns, continued coordination, any issues impacting the IOU implemented programs, and to learn about updates of other programs. The IOU's will also provide notice once advice letters have been filed and implementation plans have been uploaded to CEDARS of any new program similar to SoCalREN's public programs that may result from the third-party solicitation process. The Joint PAs developed and maintain an "NMEC Participation Coordination for Public Agencies" document. This document will serve as the coordination protocol for the Joint PAs' in which all REN and IOU NMEC projects can coordinate and is attached in Appendix E. Once third-party programs have been selected, the Joint PAs will work to update coordination documents.

6. Coordination Between SW Program (s)

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

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

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

Table 15: SoCalREN's 2022 Public Agency NMEC Program Compliance with D.12-11-015

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

F. PLACEHOLDER: SOCALREN PUBLIC AGENCY STREAMLINED SAVINGS PATHWAY, (SCR-PUBL-B4)

The SoCalREN Streamlined Savings Pathway (SSP) program serves as a temporary gap-filling program that will supplement the public sector segment while waiting for new third party IOU programs to be on-boarded and enter the market. The program is designed to leverage both a deemed and custom approach to processing public agency projects that maximizes savings opportunities while minimizing processing times and will focus on electric measures only due to SoCalGas’s holistic Third Party public agency program already in place. Public Agencies and the SoCalREN non-resource programs are highly dependent on IOU incentive programs. The SSP’s primary objective is to ensure there is no gap in the market and to support the continued momentum of public agency project delivery.

This program is proposed to be piloted in 2022, and if needed 2023. The program will target local

public agency projects that emphasize energy efficiency improvements in DACs, rural and underserved communities.

The following placeholder regarding SoCalREN’s proposed Streamlined Savings Pathway program is provided for informative and near-term coordination purposes. Pursuant to D.18-05-041, new programs are subject to Commission Advice Letter approval and must be included for consideration in Program Administrators Annual Budget Advice Letter filings. SoCalREN will file a Tier 2 advice letter [AL #15-E-G] on September 1, 2021 which include all programmatic implementation elements proposing the SSP program for Commission consideration and approval.

1. Summary of Program Objectives

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

2. Summary of Program Differentiation

The following table provides a summary of the PAs’ available programs for 2022 Public Sector.

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

Program Parameters	SoCalREN SSP (SCR-PUBL-B4)	SCE – Public Sector Third Party Programs(s)	SoCalGas Public – Deemed Public - Calculated 3PP for Public
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Target Audience (s)	Public Agencies: • Cities, counties, tribes, local government hospitals and hospital districts, water districts, K-12 schools, wastewater districts, sanitation districts, ports, airports, and other special districts	Design dependent on third-party solicitation outcome	All Public Agencies that include but not limit to cities, counties, local governments, public K-12 schools, special districts, federal governments and agencies, Indian tribes, water districts
Resource or Non-Resource	Resource	Resource	Resource
Eligible Measures	Custom and deemed	Design dependent on third-party solicitation outcome	Custom, Deemed and Direct Install,
Budget²	\$1,150,000	\$7,800,000	\$1,332,000

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

Table 17: Public Agency Resource Incentive Programs Comparison

Program Parameters	SoCalRENSSP Program	SCE Public Sector Third Party Program	SoCalGas
Eligible Facilities	Buildings and Non-building facilities; e.g., exterior lighting (incl. Street lighting)	Design dependent on third-party solicitation outcome	Buildings and Non-buildings, Systems

² The budgets provided herein are estimates. Final 2022 budgets will be provided in the PAs’ Annual Budget Advice Letters that will be filed on September 1, 2021.

Eligible Agencies	Eligible sub-segment of Public Agencies (target DACs, rural, low-income communities)	Design dependent on third-party solicitation outcome	All Public Agencies
Eligible Measures	HVAC, Lighting, Commercial Refrigeration, Food Service, building envelope, appliance plug load, Service and domestic hot water, pumping, process optimization	Design dependent on third-party solicitation outcome	HVAC, water heating, steam plant/system, building envelope, food service equipment; gas engine, system optimization
Technical Assistance	Will leverage PDP offerings included above under program details.	Design dependent on third-party solicitation outcome	Technical assistance and EE audits
Measurement	Deemed and Custom	Design dependent on third-party solicitation	Custom, Deemed and Direct Install
Approval	Deemed and Custom	Design dependent on third-party solicitation	
Performance Payment	Incentives based on savings achieved (kWh)	Design dependent on third-party solicitation outcome	Incentive and rebate
Resource or Non-Resource	Resource	Design dependent on third-party solicitation	Resource

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

SCE will offer a portfolio of third-party implemented programs to support Public Sector customers in 2022. SCE is soliciting new third-party programs for the Public Sector in 2021 with a goal of

implementation in 2022.³ SCE’s local public solicitation is in the RFP stage with an expected selection by the end of 2021. SCE’s statewide water/wastewater solicitation will be releasing RFP in Q3 2021 with an expected selection by Q2 2022. The statewide higher education solicitation is in the RFP stage with an expected selection by Q1 2022. SCE will provide notice once advice letters have been filed and implementation plans have been uploaded to CEDARS of any new program similar to SoCalREN’s public programs that may result from the third-party solicitation process.

4. Comparable SoCalGas Public Program –

N/A – No gas measures

5. Coordination Protocol Between Programs

A focus on collaboration of the PAs is critical to this program’s successes. As with SoCalREN’s other programs, SoCalREN will include coordination on this program with its monthly project coordination meetings specifically with its partner IOU partners. SoCalREN will also utilize the document titled “SoCalREN-IOU Coordination Plan for Public Agencies” as the coordination protocol for this program as it does for its other programs. This plan is closely followed by all parties and lays out all coordination regarding agency enrollment, commitment, and ongoing SoCalREN project delivery services. This document is provided in Appendix E.

In addition to the SoCalREN-IOU Coordination Plan implemented by the Joint PAs, there is also a monthly "program coordination call" and monthly SCE IOU-specific “project coordination call.” The IOUs will make the SoCalREN aware of programs and resources available, including public sector programs. The IOU’s will also provide notice once advice letters have been filed and implementation plans have been uploaded to CEDARS of any new program similar to SoCalREN’s public programs that may result from the third-party solicitation process. Once third-party programs have been selected, the Joint PAs will work to update coordination documents.

³ More information on SCE’s third-party solicitation can be found at: <https://www.sce.com/partners/Energy-Efficiency-Solicitations>

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

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

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

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

REN Criteria	SoCalREN Public Agency Streamlined Savings Program (SCR-PUBL- B4)
1. Activities IOU cannot or does not intend to undertake	
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	<ul style="list-style-type: none"> • Program addresses gaps left by IOU program closures and third party program limitations; SoCalREN will launch the Streamlined savings pathway in Q1 of 2022 and adjust as needed to not duplicate offerings as new third party programs are introduced to the market. • This program offers Public Agencies no loss in available services
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	

G. SOCALREN PUBLIC AGENCY REVOLVING LOAN FUND, (SCR-FIN-C1)

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

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

1. Summary of Program Objectives

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

2. Summary of Program Differentiation

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

Table 19: SoCalREN, SCE and SoCalGas Public Sector Financing Programs Summary

Program Parameters	SoCalREN Public Agency RLF, (SCR-FIN-C1)	SCE On-Bill Financing [SCE-13-SW-007A]	SoCalGas Statewide Finance Program – On-Bill Financing [SCG3735]
Target Audience (s)	Public Agencies: <ul style="list-style-type: none"> · Cities, counties, tribes, K-12, local government hospitals and hospital districts, water districts, wastewater districts, sanitation districts, ports, airports, and other special districts. 	All non-residential customers, including all Public Sector customers	All non-residential customers, including all Public Sector customers
Resource or Non-Resource	Non-resource	Resource	Resource
Eligible Measures	N/A	N/A	N/A
Budget¹¹	\$550,000 (CPUC Funds) (\$2,100,000 Non CPUC funds)	\$800,000 (implementation budget) \$15,000,000 (total loan pool)	\$658,531 (Implementation Budget) \$5,500,000 (total loan pool)

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

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

¹¹ The budgets provided herein are estimates. Final 2022 budgets will be provided in the PAs’ Annual Budget Advice Letters that will be filed on September 1, 2021

Table 20: Public Sector Financing Program Comparison

Program Parameters	SoCalREN: Revolving Loan Fund (RLF)	SCE comparable program: On-Bill Financing (OBF)	SoCalGas comparable program: On-Bill Financing (OBF)
Amount Financed	100% of project costs up to Program cap (no incentive provided)	Qualifying project cost, less approved rebates and incentives, up to Program cap by meter	Qualifying project cost, less approved rebates and incentives, up to Program cap by meter
Timing of Loan Funds Distribution	Upfront - before project installation and upon receipt of signed RLF Loan Agreement	Post-Installation - After project installation, Installation Report approval and signed OBF Loan Agreement submitted	Post-Installation - After project installation, installation approval and signed OBF Loan Agreement submitted. Additionally, Public Sector customers are eligible to receive milestone payments during installation. After installation is complete, the prefunded loan amount will convert to a standard OBF loan.
Source of funds leveraged for financing	Non-ratepayer funding	Ratepayer funding	Ratepayer funding
Term	Up to 5 years, regardless of installed equipment	Up to 10 years or EUL of installed equipment	Up to 15 years or EUL of installed equipment
Eligible Measures	All measures related to an EE project	Measures with Utility rebates and incentives	Measures with Utility rebates and incentives
Annual % interest rate	0%	0%	0%
Other Fees	One-time Administrative Fee	None	None
Repayment	Off-Bill	On-Bill	On-Bill

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

The On-Bill Financing (OBF) Program offers zero-percent interest financing for the installation of

qualifying EE measures. Loans are available to qualifying non-residential customers, including commercial, industrial, government, and institutional customers, and customers repay their loan as a line item on their bill. This Program supports the Strategic Plan's Commercial Sector goals and strategies. OBF is offered with other SCE and SoCalGas programs, including SW, Third-Party, Retro-commissioning, and Local Government Partnership offerings.

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

4. Coordination Protocol Between Programs

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

In addition, these calls will be utilized to discuss project status, updates, and coordination between the projects' participation in SoCalREN's RLF and IOU OBF Programs. These calls will also be utilized to identify any overlaps and mitigate customer confusion. Additionally, should the IOU's third-party solicitation result in a similar program design, the IOUs will notify SoCalREN as above.

5. Coordination Between SW Program(s)

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

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

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

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

Table 21: SoCalREN’s 2022 Public Agency RLF Program Compliance with D.12-11-015

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

H. SOCIALREN RESIDENTIAL LOAN LOSS RESERVE, (SCR-FIN-C2)

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

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

partner does and funds revolve as loans amortize.

1. Summary of Program Objectives

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

2. Summary of Program Differentiation

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

Table 22: SoCalREN, SCE, and SoCalGas Loan Loss Reserve/Financing Programs Summary

Program Parameters	SoCalREN Residential LLR, (SCR-FIN-C2)	SCE New Finance Offerings [SCE-13-SW-007C]	SoCalGas New Finance Offerings [SCG3737]
Target Audience (s)	Multifamily property owners	Residential customers, Affordable Multifamily Property Owners and Small Businesses	Residential customers, Affordable Multifamily Property Owners and Small Business
Resource or Non-Resource	Non-resource	Non-resource	Resource
Eligible Measures	N/A	See gogreenfinancing.com	See gogreenfinancing.com
Budget¹²	\$650,000	\$1,800,000 for New Finance Offerings Program	Residential - \$21 million in credit enhancements Multifamily Program- \$2.1 million in credit enhancements

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

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

Table 23: Residential Loan Loss Reserve Program Comparison

¹² The budgets provided herein are estimates. Final 2022 budgets will be provided in the PAs’ Annual Budget Advice Letters that will be filed on September 1, 2021

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

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

¹⁴ Ibid.

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

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

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

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

funds.

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

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

4. Coordination Protocol Between Programs

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

5. Coordination Between SW Program (s)

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

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

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

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

Table 24: SoCalREN’s 2022 Residential LLR Program Compliance with D.12-11-015

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

I. SOCIALREN WORKFORCE EDUCATION & TRAINING, (SCR-WET-D1)

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

The SoCalREN WE&T Program provides: 1) **comprehensive** regional workforce education, training, and resources for DAW/HTRs and SWMDVBE contractors of all skill levels; 2) entry-level

workforce skills training for in-school youths 3) SWMDVBE contractors’ local government public agency training and capacity building in regard to sustainability projects and RFPs; and 4) a green career pathway for classified at-risk and or homeless individuals, such as transition age at-risk foster youth.

1. Summary of Program Objectives

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

2. Summary of Program Differentiation

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

Table 25: SoCalREN, SCE, and SoCalGas WE&T Programs Summary

Program Parameters	SoCalREN WE&T (SCR-WET-D1)	SCE WE&T Integrated Energy Education & Training Program – [SCE-13-SW-010A]	SoCalGas WE&T Integrated Energy Efficiency Training (IEET) [SCG3729]
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Target Audience (s)	<ul style="list-style-type: none"> · Architects, designers, engineers, contractors, building operators, technicians, craft/tradesmen, customers, youth, classified disadvantaged workers, and building owners · SWMDVBE that can potentially support IOU resource program sectors and local public agencies sustainability projects. · Homeless (i.e., at-risk transition youth) 	Occupations supporting IOU resource program sectors.	Workers in or pursuing occupations that can provide professional and technical capabilities needed by IOU resource program sectors.
Resource or Non-Resource	Non-resource	Non-resource	Non-resource
Eligible Measures	N/A	N/A	N/A
Budget¹⁵	\$700,000	\$3,850,000	\$2,808,149

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

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

Table 26: WE&T Program Comparison

Program Parameters	SoCalREN WE&T	SCE WE&T Integrated Energy Education & Training Program	SoCalGas WE&T Integrate Energy Education Training Program
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¹⁵ The budgets provided herein are estimates. Final 2022 budgets will be provided in the PAs’ Annual Budget Advice Letters that will be filed on September 1, 2021.

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

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

The SoCalGas WE&T Integrated Energy Efficiency Training (IEET) subprogram (formerly Centergies) offers both technical and foodservice workforce trainings that can leverage SoCalREN local contacts to inform and equip workforce talent with skills to assist in meeting the State’s energy and climate goals.

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

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

The SCE Workforce WE&T Integrated Energy Education & Training Program (formerly Centergies) offers resources to help shape the future energy workforce through occupational, employer, and technology-focused workshops and seminars, along with workplace-based hands-on technical training. These programs aim to provide pathways and training for certifications and credentials in energy-related industries. In addition to the training courses offered, the Foodservice Technology Center conducts standards-based equipment testing and evaluation that enhance commercialization of emerging energy efficient technologies and programs. These services are delivered with technical integrity and scientific rigor in order to ensure our partners stay competitive and maintain cost effectiveness. The Energy Centers provide a host of other value-added customer programs and services such as the Tool Lending Library, tours, and on-site energy audits at no-cost to the customer.

5. Coordination Protocol Between REN and IOU Programs

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

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

6. Coordination Between SW Program(s)

The IOU partners will coordinate with organizations that offer soft skills training and workforce development support as part of the SW Career and Workforce Readiness (CWR) Program in 2022. This Program will also be leveraged by SoCalREN to support the core WE&T activities of SoCalREN. In addition, the IOU local Integrated EE Training post-secondary program component can be leveraged to collaborate with post-secondary and similarly positioned education and training entities to increase the quantity and competency of all workers at all levels of EE industry sectors.

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

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

Table 27: SoCalREN’s 2022 WE&T Program Compliance with D.12-11-015

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

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

In D.12-11-015 and reaffirmed in D.19-12-021, the CPUC directed the RENs to deliver programs and activities that met a threshold of criteria:^{20,21,22}

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

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

²⁰ D.12-11-015, p. 17.

²¹ D.19-12-021, p. 32.

²² D.16-08-019, pp. 11-12.

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

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

As a peer-driven organization, SoCalREN’s portfolio utilizes its local expertise and direct relationship networks to quickly survey the market in which they serve and undertake activities that IOUs cannot or do not intend to undertake, in other words “RENs fill the Gap”.

Since the inception of SoCalREN, these activities have been developed based on market needs, lessons learned from historical IOU programs and peer-to-peer sharing which has brought innovation at a small replicable scale. **Table 28** describes in detail many, but not all, the activities and strategies to be implemented in 2022 that “fill the gap” and define SoCalREN’s unique value.

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

	delivery path for all public agencies	provided in EE PDP section
DER DAC PD Program	<ul style="list-style-type: none"> · Comprehensive DER audits not available through EE portfolio 	<ul style="list-style-type: none"> ➤ Full Scale project services offered which include DER audits and DER technical services
Public Agency RLF	<ul style="list-style-type: none"> · No short-term construction financing offered for public agencies 	<ul style="list-style-type: none"> ➤ Short term 0% interest loan for public agency EE projects
Residential Community Coordinator (RCC) <i>Closed due to COVID-19</i>	<ul style="list-style-type: none"> · No SPOC offerings for non-primary English-speaking small MF property owners 	<ul style="list-style-type: none"> ➤ Leverages public agency energy champions/leaders to engage the HTR ➤ A multi-language SPOC offered throughout the entire project path that assist small MF property owners
Multifamily Program	<ul style="list-style-type: none"> · Currently no regional electric Multifamily whole building retrofits offering 	<ul style="list-style-type: none"> ➤ Whole building electric and gas measure retrofits offered
WE&T Program	<ul style="list-style-type: none"> · No local workforce offering for homeless and DAWs · No training offered to assist WMDVBE's participate in public agency EE project RFPs 	<ul style="list-style-type: none"> ➤ Workforce offering that provides certified pathways for homeless and DAWs ➤ Full-service training offered to assist WMDVBE's in public agency EE project RFPs
Streamlined Savings Pathway	<ul style="list-style-type: none"> · Program addresses gaps left by IOU program closures and third party program limitations; SoCalREN will launch the Streamlined savings pathway in Q1 of 2022 and adjust as needed to not duplicate offerings as new third party programs are introduced to the market. · This program offers Public Agencies no loss in available services 	<ul style="list-style-type: none"> ➤ Provide a streamlined incentives pathway for public agencies projects ➤ Focus on projects serving or in rural, DAC and low-income communities
Kits for Kids	<ul style="list-style-type: none"> · Currently no online interactive gaming platform that teaches 4th grade students · EE incentives for classrooms that support, promote EE installations. 	<ul style="list-style-type: none"> ➤ Online interactive gaming platform that educates elementary school children and their families while offering them no cost energy savings measures

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

In addition, the SoCalREN public agencies offerings successfully complement and supplement the activities of existing LGP programs, as well as other Public Sector EE programs administered by partner utilities, SCE, and SoCalGas. Public agencies face unique challenges and barriers that include limited technical resources to identify, develop, and implement projects; inadequate and limited access to data about building performance; financing hurdles; unique procurement requirements; protracted decision-making processes; and managing within a political environment, among others. SoCalREN's Public Agency EE PDP, DER DAC PDP, and NMEC Program aim to address these unique challenges and provide the necessary services different from or not currently offered by IOU programs for public agencies.

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

The SoCalREN strategies for its 2022 portfolio strive to enhance cross-cutting activities, collaboration, and leverage with the IOUs; but to also adjust and reform its overall program portfolio, consistent with and in furtherance of the Commission's mandate for RENs to pilot new approaches and models that are scalable and replicable (D. 12-11-015). These approaches include:

- Public Agency Revolving Loan Fund – short-term construction financing [no current utility undertaking].
- Residential Community Coordinator – public sector coordinator targeting multifamily property owners and upgrade education & outreach at a community not individual level [no current utility undertaking]. (*Closed due to COVID-19*)
- Public Agency NMEC Program – NMEC Program for public agencies with streamlined project application reviews, staff training, and support to ensure persistence of savings.
- DER DAC Program – comprehensive program that offers technical assistance and DER energy audits alongside EE project implementation.
- Workforce Education & Training Program – targets homeless (specifically transition at -risk youth) and provides a certified career path to the EE industry.

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

SoCalREN’s 2022 Portfolio meets the criteria outlined in D.12-11-015 and D.19-12-021 by utilizing strategies intended to be unique, scalable, and cost-effective, with the potential to be long term.

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

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

SoCalREN’s Multifamily Program will work in parallel with its RCC to build relationships among its HTR constituents, such as multifamily property owners whose

primary language is not English and who currently own properties in DACs. Public agency relationships will help to gain trust and confidence in REN offerings as well as their IOU partner program offerings. Building trust will in turn help these HTR constituents understand the value proposition of EE.

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

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

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

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

Check D.12-11-015 Threshold Criteria that apply for each program	Comparable IOU Program, if applicable	1. Activities that utilities cannot or do not intend to undertake.	2. Pilot activities where there is no current offering, and where there is potential for scalability to a broader geographic reach, if successful.	3. Pilot activities in hard-to-reach markets, whether or not there is a current utility program that may overlap.
Multifamily Program [SCR-RES-A1]	SCE Willdan Multifamily Program [SCE_3P_2020RCI_004] – SoCalGas Multifamily Upgrade [SCG3705]	XX		XX
Kits for Kids [SCR-RES-A3]		XX		XX
Energy Efficiency Project Delivery Program [SCR-PUBL-B1]	SCE Third Party Public Sector Program(s) [SCE-TBD] SoCalGas Government	XX		

²¹ This includes all SoCalGas partnership programs with local governments.

Check D.12-11-015 Threshold Criteria that apply for each program	Comparable IOU Program, if applicable	1. Activities that utilities cannot or do not intend to undertake.	2. Pilot activities where there is no current offering, and where there is potential for scalability to a broader geographic reach, if successful.	3. Pilot activities in hard-to-reach markets, whether or not there is a current utility program that may overlap.
DER DAC Project Delivery	Not Applicable	XX	XX	XX
Public Agency NMEC Program [SCR-PUBL-B3]	SCE Public Sector Third Party Program(s)[SCE-TBD] SoCalGas High Opportunity Projects and Programs - Metered and Performance-Based Retrofits (MPBR) Program	XX	XX	XX
Public Agency Streamlined Savings Pathway [SCR-PUBL-B4]			XX	
Public Agency Revolving Loan Fund [SCR-FIN-C1]	SCE Statewide Finance Program – On-Bill Financing [SCE-13-SW-007A] SoCalGas Statewide Finance Program – New Financing Offerings [SCG3737]	XX	XX	XX

Residential Loan Loss Reserve [SCR-FIN-C2]	SCE New Financing Offerings [SCE-13-SW-007C] SoCalGas New Financing Offerings – Residential Energy Efficiency Loan (REEL) [SCG3737]		XX	XX
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<p>Check D.12-11-015 Threshold Criteria that apply for each program</p>	<p>Comparable IOU Program, if applicable</p>	<p>1. Activities that utilities cannot or do not intend to undertake.</p>	<p>2. Pilot activities where there is no current offering, and where there is potential for scalability to a broader geographic reach, if successful.</p>	<p>3. Pilot activities in hard-to-reach markets, whether or not there is a current utility program that may overlap.</p>
<p>Workforce Education & Training [SCR-WET-D1]</p>	<p>SCE WE&T Integrated Energy Education & Training Program [SCE-13-SW-010A] SoCalGas' WE&T Integrated Energy Education Training Program [SCG3729]</p>	<p>XX</p>	<p>XX</p>	<p>XX</p>

APPENDIX B: SOCALREN SUMMARY OF PROGRAMS OFFERED FOR 2022

Table B-1. SoCalREN Summary of Programs, 2022⁴

REN Program Unique ID	Sector	Annual Budget	Eligible Measures
Multifamily Program [SCR-RES-A1]	Residential	\$7,000,000	Resource program.
Kits for Kids [SCR-RES-A3]	Residential	\$1,200,000	Not applicable. Non-resource program
Energy Efficiency Project Delivery Program [SCR-PUBL-B1]	Public	\$6,000,000	Not applicable. Non-resource program
DER DAC Project Delivery Program [SCR-PUBL-B2]	Public	\$1,550,000	Not applicable. Non-resource program
Public Agency NMEC Program [SCR-PUBL-B3]	Public	\$2,615,000	CMPA process; whole building measures
Public Agency Streamlined Savings Pathway [SCR-PUBL-B4]	Public	\$1,150,000	Resource Program
Public Agency Revolving Loan Fund [SCR-FIN-C1]	Cross-cutting: Financing	\$550,000	Not applicable. Non-resource program
Loan Loss Reserve [SCR-FIN-C2]	Cross-cutting: Financing	\$650,000	Not applicable. Non-resource program
Workforce Education & Training [SCR-WET-D1]	Cross-cutting: WE&T	\$700,000	Not applicable. Non-resource program

⁴ The budgets provided herein are estimates. Final 2022 budgets will be provided in the SoCalREN’s Annual Budget Advice Letters that will be filed on September 1, 2021.

APPENDIX C: SCE AND SOCALGAS SUMMARY OF COMPARABLE PROGRAMS

Table C-1. SCE Summary of Comparable 2022 programs

IOU Program Unique ID	Sector	Annual Budget	Eligible Measures²³
Willdan Multifamily Third- Party Energy Efficiency Program [SCE_3P_2020RCI_004]	Residential	\$6,300,000	Lighting, HVAC, and water heating technologies.
Statewide Finance Program – On-Bill Financing [SCE-13-SW-007A]	Cross-cutting: Financing	\$800,000 (implementation budget) \$15,000,000 (total loan pool)	Not applicable.
New Financing Offerings [SCE-13-SW-007C]	Cross-cutting: Financing	\$1,800,000	Not applicable. Non-resource program
Local Government Public Sector Third-Party Program(s) Note: Includes all local public sector program budgets	Public	\$7,600,000	Design dependent on third-party solicitation outcome.
WE&T Integrated Energy Education & Training Program [SCE-13-SW-010A]	Cross-cutting: WE&T	\$ \$3,850,000.	Not applicable. Non-resource program

Table C-2. SoCalGas Summary of Comparable 2022 Programs

IOU Program Unique ID	Sector	Annual Budget²⁴	Eligible Measures
Home Upgrade Program - Multifamily Home Upgrade Program [SCG3705]	Residential	\$2,361,124	Resource program
Residential Direct Install Program [SCG3820]	Residential	\$2,515,590	Resource program
Statewide Finance Program – On-Bill Financing [SCG3735]	Cross-cutting: Financing	\$5,500,000 loan pool	Resource
New Financing Offerings [SCG3737]	Cross-cutting: Financing	\$21,000,000 in credit enhancements available statewide	Resource
Public Sector Calculated Incentive [SCG3815]	Public	\$618,657	Resource
Public Sector Deemed Incentive [SCG3816]	Public	\$993,303	Resource
Public Small/Medium Program [SCG3846] [SCG3817]	Public	\$2,000,000	Resource
LA County Partnership [SCG3742]	Public	\$180,107	Non-Resource
Santa Barbara County Partnership [SCG3746]	Public	\$127,070	Non-Resource
South Bay Cities Partnership [SCG3747]	Public	\$151,554	Non-Resource
San Luis Obispo County Partnership	Public	\$92,206	Non-Resource

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

IOU Program Unique ID	Sector	Annual Budget²⁴	Eligible Measures
San Joaquin Valley Partnership [SCG3749]	Public	\$113,007	Non-Resource
Orange County Cities Partnership [SCG3750]	Public	\$256,467	Non-Resource
Ventura County Partnership	Public	\$202,737	Non-Resource
Gateway Cities Partnership [SCG3776]	Public	\$152,576	Non-Resource
San Gabriel Valley COG Partnership [SCG3777]	Public	\$166,896	Non-Resource
Westside Cities Community Partnership [SCG3779]	Public	\$151,194	Non-Resource
Western Riverside Energy Partnership [SCG3783]	Public	\$245,945	Non-Resource
San Bernardino Regional Energy Partnership [SCG3802]	Public	\$200,994	Non-Resource
Public Sector Resource Program [SCG3773]	Public	\$583,424	Non-resource
Large Public Sector Program (slated mid 2022)	Public	TBD	Resource
WE&T I EET [SCG3729]	Cross-cutting: WE&T	\$2,808,149	Not applicable. SW Non-resource program
Large Public Sector Program (slated mid 2022)	Public	TBD	Resource
WE&T I EET [SCG3729]	Cross-cutting: WE&T	\$2,808,149	Not applicable. SW Non-resource program

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

**SoCalREN, SCE, SoCalGas
Coordination Strategy for Public Agencies**

Last Updated: June 8, 2021

To be updated upon completion of utility local public sector solicitations (approximately Q1 2021). Document is for current program offerings.

SoCalREN and IOUs will coordinate their respective IOU programs including IOU's core and Third Party Programs (3PP) and resources to minimize duplicative offerings and work in an approach where the SoCalREN complements and supplements the IOU and IOU's 3PPs, yet understanding this is a reciprocal relationship. SoCalREN and IOUs should work toward a goal that minimizes duplication of programs consistent with the approved annual Joint Coordination Memo (JCM) and provides all public agencies a plethora of programs and offerings by Program Administrators allowing the customer to be the decision maker. This approach is in the best interest of the customer providing complementary tools that help bridge gaps in meeting their agency's goals.

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

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

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

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

SoCalREN, SCE and SoCalGas will work collaboratively to develop coordinated strategies that enrich respective program offerings and elevate services to public agencies. Direct communications between SoCalREN Program Representatives, SCE Program and Account Managers, SoCalGas Program Managers and Account Executives, and 3PP implementers are intended to successfully drive energy efficiency project delivery and foster public agency satisfaction. Key coordination strategies include the following:

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

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

Customer Data & Information

- SoCalREN's preference is to obtain customer information directly from the customer. SoCalREN must provide the IOU written customer authorization (i.e. signed CISR form) to obtain additional customer information related to energy efficiency project delivery, as needed.
- Upon request, IOUs will provide customer authorized project-level data to SoCalREN monthly upon request through the IOU/REN Data Transfer template for projects going through IOU programs (i.e. not third-party programs).
 - SoCalREN will acquire written documentation of the customer's authorization (i.e., signed CISR Form) to obtain project-level data or information from an IOU. . This documented authorization will be provided by SoCalREN to appropriate IOU's lead PM for IOU/REN coordination.

Customer Engagement & SoCalREN Enrollment Activities

- If a Public Sector IOU representative receives an inquiry about SoCalREN program services, the IOU representative will contact SoCalREN representatives and determine how best to set the follow-up meeting with the agency.
- Once the agency is enrolled, SoCalREN will provide regular updates to inform the IOU representatives on key project related SoCalREN activities when the agencies are pursuing IOU core or 3PPs and keep IOUs informed of activities with those agencies.
- Once the agency is enrolled, IOU representatives will inform SoCalREN about key SoCalREN project-related interactions with the agency and keep SoCalREN informed of activities with agencies.
- SoCalREN will timely inform appropriate SCE Account Managers and SoCalGas Account Executives/Public Sector/LGP Program Managers of any engagement meeting prior to enrollment in EE Project Delivery services, and send an email request to learn more about the client's needs and opportunities. Notification of the enrollment meeting would happen typically two weeks prior to a meeting. SoCalREN will make best efforts for advanced notice of enrollment meetings and accommodate utility representative schedules, as feasible, depending on the availability of the agency.
- Agency's past participation in utility programs will be addressed through pre-coordination communications to calibrate expectations of energy savings potential.
- IOU attendance at engagement meetings is optional; however, reasonable efforts to arrange for participation by interested IOU leads will be made by SoCalREN. SoCalREN will notify appropriate IOU partners of the meeting, and they may request to participate.
 - No more than two (2) representatives from each IOU may participate at the engagement meeting (unless additional representatives' participation is identified and discussed prior to the meeting). .
- SoCalREN may elect to conduct the customer meeting during the enrollment

process as a remote conference call or webinar. Preference stands for an in-person meeting, but consideration of travel related resources may lead to remote venues for cost-effective purposes.

- Enrollment meetings may include multiple eligible agencies to streamline coordination activities.
- If meeting is remote webinar, the meeting should use an application that is accessible to the IOUs.
- Remote facilitation for the engagement meeting may be requested by an agency or SoCalREN at any time. When facilitating a meeting in-person, remote participation may also be coordinated as needed or if an alternative utility representative cannot be identified to attend.

Project Specific Activities

- Efforts will be made to present applicable utility core and 3PPs to customers by SoCalREN representatives when evaluating projects. SoCalREN will connect agencies with appropriate utility or 3PP representatives when interest is expressed, and utility leads will connect interested parties to SoCalREN representatives when interest is expressed.
- SoCalREN will include the SCE Lead PM and SoCalGas Lead PM on all appropriate communications to other IOU representatives related to SoCalREN activity. Conversely, IOU representatives will include SoCalREN PMs and SCE Lead PM and/or SoCalGas Lead PM on agency directed communications where SoCalREN is supporting project development and implementation.
- SoCalREN will follow the existing process of submitting incentive/rebate applications as Trade Professional when the customer has asked SoCalREN to file the incentive/rebate applications on their behalf. SoCalREN will work with the appropriate IOU representative and/or 3PP implementer for timely completing items such as a Project Feasibility Study and collecting influence documentation to ensure a complete application for submittal.
- SoCalREN will provide a courtesy copy of Incentive applications and Early Screening Documents to Account Managers/Account Executives at the time of submittal to Business Incentives for applications going through the IOU core or 3P programs.

How will SoCalREN and SoCalGas Public Sector coordinate services and activities? (The portion referenced and related to LGP in this section is applicable until December 31st, 2021. SoCalGas continues to service all public sector customers through its Public Sector Energy Pathways. SoCalGas Public Sector program leads will continue to engage in IOU/REN coordination in 2022 and beyond.)

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

- SoCalREN will inform the appropriate SoCalGas Public Sector/LGP

- Program Manager when scheduling the engagement meeting with a public agency within a designated Public Sector/LGP region.
- When engaging non-LGP agencies or any public agency post 2021 within a SoCalREN Regional Partnership territory, SoCalGas will be extended the opportunity to educate agencies on the Public Sector/LGP Program availability during the engagement meeting. SoCalREN & SoCalGas will align on the presentation facilitation and content ahead of the meeting.
 - SoCalREN will work with the SoCalGas representatives (Public Sector/LGP Program Manager and/or Account Executive) via email prior to attending the engagement meeting to coordinate technical assistance offerings and determine how to best collaborate on a strategy that helps meet the client's needs, leveraging all feasible resources. For example: If an LGP or other Public Sector program has audit resources available, these should be evaluated (considering comprehensiveness and project needs) as a first step. Pre-coordination calls can be scheduled on an as-needed basis.
 - Agency contacts, roles, and responsibilities will be confirmed, and communication strategies discussed.
 - SoCalGas roles and responsibilities, including primary contact designation for unassigned and non-LGP agencies will be confirmed.
 - Agency's past activities through the Public Sector/LGP and participation in utility programs will be discussed to calibrate expectations of energy savings potential.
 - If a Public Sector/LGP Program Manager/Account Executive receives an inquiry about SoCalREN program services, the Public Sector/LGP Program manager will contact SoCalREN representatives and determine how best to set the follow up meeting with the agency.
 - Once the agency is enrolled, SoCalREN will provide regular updates to inform the IOU and Public Sector/LGP representatives on key project related SoCalREN activities with those agencies.
 - Once the agency is enrolled, IOU and Public Sector/LGP representatives will inform SoCalREN Representatives on key SoCalREN project-related interactions with the agency and keep SoCalREN informed of activities with agencies.

How will SoCalREN and other SCE/SoCalGas/3PPs coordinate services and activities?

SoCalREN may engage and coordinate with additional utility program leads in order to avoid duplication of efforts and offerings. Initial introductions to 3P or other utility Program Leads for coordination purposes will be initiated as follows:

- For SCE 3P programs, SoCalREN will coordinate directly with the 3P implementer.
- For SCG led programs, SoCalREN will coordinate directly with both SoCalGas and the 3P implementer.
- SoCalREN will engage with existing and new 3P implementers to coordinate engagement strategies from enrollment through project development subject to

- agreement by the 3P implementers.
- As projects are developed, SoCalREN will identify which 3PP will be applicable to the measures and sites audited and coordinate with the 3PP implementers as needed.

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

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

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

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

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

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

Opportunities to learn about the program include:

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

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

SCE will monitor the reviews of all SoCalREN public sector EE program applications to reduce project delays. This will be accomplished by:

- Bi-weekly check in meetings with the Commercial Custom Program Manager to review the status of all project applications including Early Screening Documents (ESD)
- SCE will adhere to the below timelines for project ESD and Application Reviews:
 - ESDs
 - SCE will acknowledge the receipt of the ESD within 1 business day of submission from SoCalREN.
 - SCE will provide an Approval, Revise and Resubmit, or Decline of the ESD within 10 business days after acknowledgement of receipt.
 - SoCalREN will respond to ESD declines or revise and resubmit requests within 10 business days. If within these 10 days, SoCalREN needs to discuss NRD issues with the IOU, SoCalREN will provide questions to be addressed at least 3 business days prior to the scheduled meeting..
 - SCE will acknowledge receipt of new ESD information within 1 business days and respond with approval or decline within 10 business days.
 - Project Applications
 - SCE will acknowledge receipt of application materials within 2 business days of submission from SoCalREN.
 - SCE will notify SoCalREN staff of required missing documents/information in the applications within 10 business days
 - SCE will aim for technical review, prior to upload to CMPA, to take no more than 30 business days per the Statewide California Program Administrator Custom Project Review Process Timeline Guide
 - SCE will issue NRDs through the established formal process and will not issue informal requests after technical review has been completed

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

**SoCalREN, SCE, SoCalGas
NMEC Participation Coordination for Public Agencies**

Last Updated: June 8, 2021

To be updated upon completion of utility local public sector solicitations (approximately Q1 2021). Document is for current program offerings.

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

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

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

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

How will SoCalREN and IOUs coordinate NMEC offerings?

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

Eligibility for Program Participation

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

program's Program Manual.

Additional Participation Considerations

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

- They are in the queue for HOPPs prior to June 1, 2019. The queue is defined as receiving predictability analysis⁵ through the respective program.
 - Any projects that are not in the HOPPs queue by June 1, 2019 will follow the established process established to jointly present IOU and SoCalREN NMEC programs to the agency using documentation such as the Project Proposal slide deck.
- The IOU has provided audit services within the last 18 months.
 - Going forward, if an agency is enrolled in SoCalREN Public Sector Programs, IOUs should coordinate with SoCalREN prior to performing an audit.

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

Communications with Public Agencies

When having the customer choose which path to pursue, the IOUs will be invited to be at the table, but their attendance is not mandatory. Conversely, when the IOUs are having HOPPs conversations with SoCalREN enrolled public agencies, SoCalREN will be invited to provide their service offerings. In addition, prior to SoCalREN presenting the NMEC program options to an agency for a project, applicable IOUs will receive the draft presentation slides to be presented to the agency. IOUs will have 7 business days to provide feedback ask questions, or request a pre-coordination call if required. If SoCalREN does not receive a response within those 7 business days, they will move forward with the slides for the scheduled meeting with the agency.

How will SoCalREN and IOUs prevent Double Dipping?

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

Can a single project participate in two NMEC programs?

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

⁵ Analysis of pre-installation energy usage patterns of a facility or site to evaluate the feasibility for an NMEC program approach

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

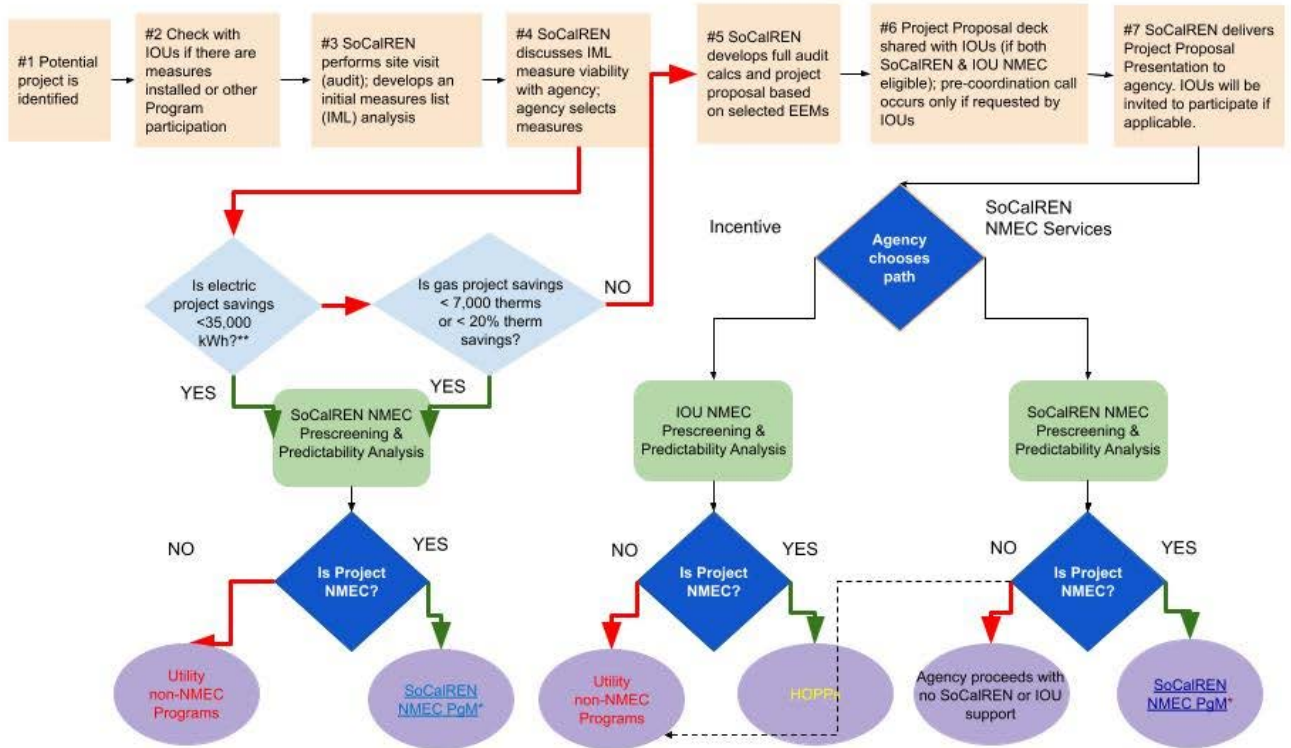
The SoCalREN Public Agency Energy Efficiency Project Delivery Program (EE PDP) and the Distributed Energy Resources for Disadvantaged Communities Program (DER DAC) are non-resource programs that provide comprehensive support services to energy efficiency projects from identification to completion. The EE PDP and DER DAC programs will continue to support agencies with project identification and audit services, from which NMEC potential projects may be developed. Following the delivery of the project proposal presentation (step 7 on the decision tree), the services will be available as follows to HOPPs projects:

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

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

Inquiries about the SoCalREN NMEC program should be directed to the program implementer. Any questions from utility staff should be directed to SCE/SCG lead PM.

NMEC Decision Tree



* The project could utilize the HOPPs program for electric savings if the SoCalREN NMEC services are utilized for gas savings and vice-versa
 **Electric savings must be greater than 10% of the energy use and EUL must be greater than the simple payback