SDG&E LEARN Implementation Plan

Energy Efficiency
Energy Division
California Public Utilities Commission

Version 2.1
May 2020

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Appendix A: Implementation Plan Template (2.0)

Program Overview

The Learning Energy and Resources Nexus (LEARN) program is designed to advance energy efficiency (EE) knowledge and skills across various sectors, focusing on upskilling workforce and trade professionals, as well as educating SDG&E customers. By leveraging a blend of modern educational techniques, including flexible online courses, video-based microlearning, and interactive webinars, the program aims to make learning accessible and engaging for all participants. The program will also establish and nurture partnerships with educational organizations to enrich their curricula with EE resources and content, fostering a collaborative approach known as the Core Energy Education Collaboration (CEEC).

Our innovative learning platform caters to the evolving needs of learners, featuring mobile-friendly coursework, dynamic animations, and simulations designed to simulate real-world applications. Interactive webinars further enhance the learning experience, offering participants the opportunity to engage directly with EE experts and peers. Additionally, the program's website serves as a valuable resource, offering access to career pathway maps, educational materials, and immersive virtual experiences, such as a 360-degree walk-through of an energy-efficient home.

By integrating cutting-edge educational content with practical tools and resources, the LEARN Program aims not only to educate about but also to inspire action towards energy efficiency. Through this comprehensive approach, we seek to empower individuals and organizations to make informed decisions and implement sustainable practices, contributing to a more energy-efficient future.

Program Budget and Savings

As a WE&T program, the LEARN program will not generate any savings but will support other efforts and programs that produce savings. At the heart of our program lies the objective to empower workforce/trade professionals, customers, and students with the knowledge and skills necessary to navigate and implement energy efficiency measures effectively. While the program may not directly result in energy savings, its indirect impact is significant and multifaceted, leading to substantial energy conservation outcomes over time.

By providing upskill training to workforce and trade professionals, the program ensures that those responsible for implementing energy efficiency measures are well-equipped with the latest knowledge and techniques. This education leads to higher quality installations and maintenance of energy-efficient technologies and practices, resulting in more effective energy use and significant savings over time. As these professionals apply their knowledge across projects and sectors, the cumulative effect on energy conservation can be substantial.

Educating customers on energy efficiency not only raises awareness but also influences behavior change. Armed with knowledge about energy-saving practices and the benefits of energy-efficient appliances, customers are more likely to make informed decisions that reduce energy consumption. This shift in consumer behavior indirectly contributes to overall energy savings as more individuals and businesses adopt energy-efficient practices and technologies.

By providing free educational resources to institutions, the program ensures that the next generation enters the workforce with a strong foundation in sustainability principles, leading to long-term systemic changes that favor energy conservation.

Education and training programs play a crucial role in accelerating the adoption of new energy-efficient technologies. As workforce and trade professionals become more knowledgeable about cutting-edge technologies, they are more likely to recommend and implement these solutions, driving innovation and efficiency in the industry.

Table 1: Program Summary

Program and/or Sub-Program Name	Learning Energy and Resources Nexus (LEARN) Program
Program / Sub-Program ID number	SDGE4174
Program / Sub-program Budget Table	See Table 2: Program / Sub-program Budget Table
Program / Sub-program Gross Impacts Table	See Table 3: Program / Sub-program Gross Impacts
Program / Sub-Program Cost Effectiveness (TRC)	N/A
Program / Sub-Program Cost Effectiveness (PAC)	N/A
Type of Program / Sub-Program Implementer (PA-delivered, third party-delivered or Partnership)	Third-Party Delivered
Market Sector(s) (i.e., residential, commercial, industrial, agricultural, public)	Cross-Cutting
Program / Sub-program Type (i.e., Non-resource, Resource)	Market Support
Market channel(s) (i.e., downstream,	Downstream

midstream, and/or upstream) and Intervention Strategies (e.g., direct install, incentive, finance, audit, technical assistance, etc.), campaign goals, and timeline.	

Table 2: Program / Sub-program Budget Table

Admin	9%	$923,829.60
Marketing	6%	$645,812.00
DI	85%	$9,225,378.78
EE Budget	100%	$10,795,020.38

Table 3: Program / Sub-program Gross Impacts

Category	Description	Program Goal
Program Performance: Expanding WE&T reach via collaborations	Number of collaborations, with contextual descriptions, by business plan sector to jointly develop or share training materials or resources	6
Program Performance: Program / reach of training	Number of participants by sector	7,000
Program Performance: Program / reach of training	Percentage of unique participants relative to eligible target population	9%
Disadvantaged Worker	Percent of participants who meet the definition of DAW	51%

Implementation Plan Narrative

1. Program Description:

The LEARN program will educate and train workforce and trade professionals and customers and collaborate with organizations that provide workforce education and training on recognizing energy savings opportunities and providing them with the skills and resources to act upon those opportunities. In keeping with CPUC Decision 21-05-021, the primary purpose of the program is to provide education and training to the current workforce and customers on energy efficiency but also to prepare the future workforce to be better able to successfully perform the jobs needed to help achieve increased energy savings targets for the IOUs and California's clean energy goals. This no-cost training for SDG&E customers will be delivered through two core initiatives: Technical Upskill and Core Energy Education Collaborations (CEEC). A detailed description of each of these components is provided in the sections below.

Technical Upskill

Technical Upskill offers innovative training to workers seeking energy efficiency upskilling (engineering, design, trade professionals, contractors, etc.) and customers who could benefit from energy efficiency education (homeowners, tenants, building owners, property/facility managers, business owners, etc.). To ensure training meets the needs of the rapidly evolving energy efficiency industry, the LEARN program works with partners and subject matter experts (SMEs) to develop tailored training and educational content for workers and customers across all segments and sectors related to energy efficiency and electrification. Topics that will be addressed include:

- Building Design and Construction
- Building Performance
- Commercial/Industrial (C/I) Energy Processes & Technology
- Decarbonization
- Electrification
- Energy Codes & Standards
- Foodservice
- HVAC
- Lighting
- Marketing, Finance, and Sales
- Rates, Rebate & Incentive Programs
- Real Estate
- Renewable Energy & Sustainability
- Zero-Net Energy

Topics offered to various customer/contractor sectors are listed in Table 4: Topics by Sector.

Table 4: Topics by Sector

Sector	Topics
Multiple Sectors	• Appliances • Benefits of electrification • Energy assessments and understanding rates • HVAC systems • Lighting • Programs and incentives • Renewable energy and battery storage • Smart controls, building automation. • Time of use / DR programs • Water energy nexus • Water heating
Residential Contractors	• Building codes and standards • Sales challenges / homeowner communication • Retrofitting strategies
Architects, Designers and Engineers	• Building energy modeling • Designing for all-electric buildings • Grid-interactive efficient buildings (GEBs) • High performance building materials • Net Zero and Carbon Neutral design
Residential Customers	• Electrification planning for homeowners • Engaging a contractor
Multifamily Tenants	• Energy efficiency checklist for renters • Renewable energy options
Commercial Contractors	• Building codes and standards • Commercial refrigeration
Agricultural Market Actors and Customers	• Efficient cooling and refrigerating units • Electric irrigation pumps and motors • Electrification in agricultural processing and storage
Industrial Building Owners/Managers	• Electric fleet management • Industrial energy storage solutions • Managing industrial electrical demand

Technical Upskill training is primarily delivered through live webinars, on-demand pre-recorded webinars, and online microlearning courses in a Learning Management System. These include simulations, animations and interactive 3D content. Some live in-person classes may be offered periodically. The educational offerings are developed and delivered by national and local SMEs with a special focus on creating engaging and interactive content accessible to diverse populations. Much of the content is in both English and Spanish.

Certification exams are available to be taken at no cost for qualified participants, including Building Performance Institute (BPI) certificates (Building Science Principles, Total Building

Performance), North American Technical Excellence (NATE) HVAC certifications, the Building Operator Certification (BOC) exam, "Designation" certifications from the Energy and Environmental Building Alliance (EEBA), and Earth Advantage).

Continuing Education Units (CEUs) are available for many courses. Examples include the American Institute of Architects (AIA), Building Performance Institute (BPI), Building Operator Certificate (BOC), North American Board of Certified Energy Practitioners® (NABCEP®), North American Technical Excellence (NATE) and International Accreditors for Continuing Education and Training (IACET).

Partnerships with workforce development organizations and community-based organizations (CBOs) enable broad community awareness of the LEARN program. Partnerships with other industry organizations allow the sharing of training resources and leveraging of collective expertise.

The LEARN website (www.sandiegolearn.com) is an informational portal that offers interactive customer education resources and downloadable PDFs, career maps, training calendars, and partner information and links. It also includes information on and links to SDG&E programs. There is an informational page specific to DAW certification opportunities and a link to the LMS where there is the online application form for people to fill out if they qualify for no-cost certifications (Disadvantaged Workers [DAW])[1]. The website supports seamless participant access to the Learning Management System.

Core Energy Education Collaborations

The LEARN program forges ongoing relationships with educational organizations, such as community colleges, four-year colleges, job training organizations, vocational schools and trade associations. This includes certificate programs, continuing education and contract training within these programs. LEARN offers CEEC partners resources as they are available and requested. These may include instructional resources, including textbooks, demonstration units, industry standards, codes, technical manuals and guides. Specific short webinars from industry experts may be arranged.

The program periodically coordinates with CEEC partners to discuss gaps in existing course content and determine where SDG&E's Technical Upskill can be used to enhance existing coursework. Based on findings, the Technical Upskill content can be modified for instructor use with trainer guides and student support materials. Train-the-trainer webinars can be held to increase the knowledge base of educational instructors. This keeps course content current without requiring a complete redesign of curricula.

CEEC students will also have access to the program website and LMS portal for additional educational content and technical training, further supporting their energy efficiency knowledge and career awareness.

[1] D.18-10-008 "Disadvantaged Worker" means a worker that meets at least one of the following criteria: lives in a household where total income is below 50 percent of Area Median Income; is a recipient of public assistance; lacks a high school diploma or GED; has previous history of incarceration lasting one year or more following a conviction under the criminal justice system; is a custodial single parent; is chronically unemployed; has been aged out or emancipated from the foster care system; has limited English proficiency; or lives in a high unemployment ZIP code that is in the top 25 percent of only the unemployment indicator of the CalEnviroScreen Tool.

2. Program Delivery and Customer Services:

The LEARN program delivers educational services to participants from each target market both directly through the Technical Upskill element and through collaborations developed with CEEC partners. For Technical Upskill, participants from residential, commercial, industrial and agricultural market segments will learn about the program offerings through various market outreach mechanisms, including email campaigns, social media, industry partnerships and community-based organizations receiving mini-grants for outreach activities.

Marketing efforts for the LEARN program will be closely aligned with its objectives, ensuring a unified approach. Here is an overview of our marketing delivery methods:

- Marketing initiatives will consistently reflect the LEARN program's goals, with strategies adjusted based on regular reviews and performance data.
- Ongoing market research and analysis will drive informed marketing decisions, ensuring our approach is responsive to trends, customer behavior, and the industry landscape.
- We will maintain uniform branding across all channels, with regular checks to ensure our messaging is cohesive and aligned with our brand guidelines.
- Marketing messages will be tailored to our segmented target audience, enhancing message effectiveness.
- A balanced use of both offline and online channels will ensure broad and effective audience reach.
- Monthly reviews of our marketing budget will guarantee efficient and impactful resource allocation.
- Planned and executed marketing campaigns will have clear objectives, with detailed plans outlining timelines, target metrics, and KPIs.
- Success will be measured using established metrics, with regular KPI reviews to refine our marketing approach.

Detailed strategy and tactics for marketing and outreach are detailed in Attachment 7: Evaluation, Measurement and Verification (EM&V)
.

For the CEEC element, the LEARN program will partner with local community colleges and other learning centers to provide various supportive services to enhance the quality and availability of relevant energy efficiency training and career advancement opportunities. As detailed below, the CEEC will provide educational materials, resources, equipment and train-the-trainer services to support this goal.

For both program elements, program staff will carefully track all relevant metrics and KPIs described in this plan through both proprietary program management software and cutting-edge learning management systems to ensure program success.

Technical Upskill
The primary initial outreach and awareness-building activities include the following:

- Presence at relevant local events to distribute general information about the program
- Targeted marketing campaigns for specific sectors with information about upcoming webinars and other training opportunities, including social media, print fliers and email
- Outreach to partners, including CBOs, Industry Partners and Workforce Development

Organizations, to provide information for them to distribute to their constituents. (Industry Partners will include decarbonization coalitions, contractor associations, realtor groups, agricultural associations and local unions)

Outreach materials direct participants to the LEARN website, www.sandiegolearn.com. This website includes the following features:

- Portal to the LMS, where all webinars and courses are accessed. The portal clearly demarcates different market sector pathways and filters for different training material Artificial Intelligence also suggests content based on any previous course interactions.
- Energy efficiency education maps showing different career growth pathways
- "Learn more" pages with content and links to related energy efficiency, DR and IDSM programs, continuing education and workforce development partner websites
- Training calendar for all live webinars and other educational events
- Links to partner websites, SDG&E programs, incentives and rebates
- Third-party certification information for DAWs
- 3-D interactive virtual energy efficiency and electrification education house

The LMS has a simple registration and login process. Once the participant enters the LMS, customized course content is presented based on pre-selected preferences established during account registration. Each time the participant returns, the customized content is updated based on previous selections, providing options pertinent to their interests. At any time, all course content can be viewed and filtered as desired by the participant.

Course Content
Course content in the LEARN program includes the following:

- Live original webinar content of 30 minutes to 1 hour, delivered by SMEs. These webinars are recorded and made available in the LMS as E-learning content.
- Existing webinar content of 30 minutes to 1 hour, delivered by SMEs. These webinars are recorded and available in the LMS for a limited time for those who missed them.
- E-learning content, which includes pre-recorded content and short courses. Most LMS courses will have video or scrollytelling content and include simulations, animations, 360 explorations or puzzles.
- Much of the content will have Spanish dubbing, sub-titles or original Spanish content.
- E-learning content varies in length but can be stopped and restarted as the participant requires.
- E-learning courses have a Certificate of Completion that can be downloaded by the participant at the end of a course. This certificate can be submitted by the participant to organizations that require CEUs, if relevant to the course. Note: a Certificate of Knowledge gives no industry certification.
- Most E-learning courses have ungraded interactive knowledge checks, including flashcards and puzzles, for the participant to check their learning.

The participant is asked to complete an evaluation survey to provide feedback at the end of a course, whether a live webinar or e-learning.

Core Energy Education Collaborations
Community colleges, trade schools and other similar educational institutions are encouraged to

contact the LEARN program for opportunities to collaborate and receive no-cost resources and educational opportunities. LEARN also proactively contacts educational institutions with offerings. Once an educational resource that is beneficial to an educational institution has been identified, a collaborative agreement is signed, and LEARN will work with partners to provide the resource at no cost to the institution. See Workforce Education and Training Participation

Disadvantaged Workers No-Cost Industry Certification
As noted in Appendix A, disadvantaged workers are encouraged to contact LEARN to take advantage of no-cost certifications. These are industry-recognized certifications or designations that have a rigorous assessment component. The online contact form link is provided to our partners, noted on relevant outreach information and highlighted on the LEARN website. The LEARN website lists all approved certifications and designations. This list is regularly updated.

Eligibility

- **Technical Upskill:** Any customer/contractor/service provider in the SDG&E service territory may participate in the energy efficiency educational trainings offered through the WE&T program. The WE&T program also allows any contractor/service provider outside SDG&E's service territory to attend trainings as they may provide services to those living within the SDG&E service territory. However, the primary target audience is the customer/contractor/service provider in SDG&E's service territory.

- **CEEC:** Any two- or four-year college, trades school, vocational school, trades associations, job training organizations, labor / unions, apprenticeships or similar program in the SDG&E service territory that offers energy efficiency and electrification training or is looking to add these subjects to their curriculum is eligible to participate in the CEEC program.

- **DAW No-Cost Industry Certifications:** As noted in Appendix A, anyone who meets the definition of disadvantaged worker based on Cal-Enviroscreen 4.0 and lives in SDG&E service territory is eligible to apply for a no-cost industry certification.

3. Program Design and Best Practices:

The LEARN program has been designed to deliver needed training using the following program strategies and tactics to reduce market barriers.

A. Customized Upskill Training and Education

Strategy: Provide no-cost, specialized upskill training for workforce/trade professionals and comprehensive energy efficiency education to customers. This includes developing new content on emerging technologies and practices to be integrated into existing courses through collaborations with educational organizations (CEEC).

Tactic: Use mobile-friendly online coursework, video-based microlearning, animations, simulations and live webinars. This is complemented by AI-driven personalized learning in the LMS for informed reporting and targeted engagement. Engage with CEEC partners to identify needed training resources.

Market Barrier Addressed: Aims to reduce the knowledge gap and enhance the skills of the current and future workforce, making it easier for them to adapt to and implement energy-efficient technologies and practices. Free education and resources remove the financial burden for participants and CEEC partners. This strategy not only democratizes access to upskill opportunities but also encourages wider participation by eliminating cost as a barrier to entry, which is crucial for engaging underrepresented and disadvantaged groups.

B. Collaborative Community Engagement and Outreach

Strategy: Leverage a network of key partners, including workforce programs, CBOs and pro bono partners, for culturally relevant, tailored outreach, especially targeting disadvantaged communities and workers.

Tactic: Employ mini-grants for CBOs to conduct targeted outreach, recruit workforce programs and pro bono partners to supplement efforts and use trusted community connections to deliver program information effectively.

Market Barrier Addressed: Addresses barriers related to accessibility and engagement in disadvantaged communities, ensuring the program reaches and benefits those most in need.

C. Industry Group Collaborations

Strategy: Establish partnerships with industry groups to share training resources and maintain alignment with the latest standards and practices.

Tactic: Develop and share training materials with industry groups, organize joint educational events and align our programs with current industry certifications. This collaboration aims to ensure our training is relevant, up-to-date and accessible.

Market Barrier Addressed: Combats the challenge of keeping pace with the fast-evolving industry landscape, ensuring our training programs are both current and widely available. These partnerships facilitate a broader reach and deeper industry integration, preparing participants effectively for the energy efficiency and electrification sectors.

D. Enhanced Accessibility, User Experience

Strategy: Prioritize user experience with a clear, intuitive design for the program's digital platforms, ensuring easy access to learning resources and information.

Tactic: Offer a central, market-specific website with clear demarcation of sector pathways, energy efficiency education maps and LMS integration that is mobile-friendly, catering to the high mobile device reliance among disadvantaged workers.

Market Barrier Addressed: Overcomes technological and informational barriers, making it easier for participants to access information and resources and engage with and complete the training.

E. Enhanced Collaboration for Supporting Disadvantaged Workers

Strategy: Foster support for disadvantaged communities and workers through enhanced collaboration, offering resources like multilingual content and accessible certification opportunities.

Tactic: Engage in active coordination with existing organizations such as CalAdvocates and workforce readiness initiatives, aiming to complement and extend their efforts. This will involve regular dialogue and strategic adjustments to align our contributions, ensuring clarity and avoiding redundancy.

Market Barrier Addressed: This collaborative effort is designed to assist disadvantaged workers more effectively by overcoming language, financial and navigational hurdles. Our goal is to enhance their engagement and success within the program through thoughtful partnership and resource sharing.

F. Promoting Program Opportunities

Strategy: Utilize the LEARN website, RHA program partner portals and other digital platforms to highlight program opportunities, especially for low-income customers and contractors serving them.

Tactic: Highlight the program on the LEARN website for the public and the RHA ESA portal, an internal site for subcontractors, ensuring wide visibility and accessibility of program opportunities.

Market Barrier Addressed: Tackles the information gap by leveraging established communication channels to inform potential participants about the program, increasing participation from low-income and disadvantaged communities.

These strategies, grounded in best practices and informed by lessons learned, are designed to effectively reduce market barriers and ensure that the program is accessible, engaging and beneficial for all targeted customer groups and market actors.

Justification of Integrated Best Practices and Lessons Learned

Our program approach, which considers the strategies and tactics above, also incorporates best practices and lessons from past initiatives:

- **Interactive and accessible learning:** The adoption of video-based microlearning and AI-driven personalized content aligns with best practices for engaging diverse learners and enhancing knowledge retention[2][3].

- **Community-centric outreach:** Using a broad network of community partners for outreach reflects a best practice in reaching and engaging disadvantaged groups effectively, leveraging trusted relationships for program dissemination.

- **Industry Collaborations:** Engaging with industry groups ensures LEARN content aligns with standards and practices, ensuring relevance and applicability. This approach bridges theoretical knowledge with practical application, which is crucial for energy efficiency and electrification sectors. Sharing resources allows maximum program reach.

- **User-centered design:** Emphasizing an intuitive, mobile-friendly user experience is informed by the lesson that accessibility is key to engaging participants, especially those from disadvantaged backgrounds4.

- **Comprehensive support:** Offering targeted support, such as multilingual resources and

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[2] 7 Ways Microlearning Engages the Learners of Today | ATD. (n.d.). Www.td.org. Retrieved March 8, 2024, from https://www.td.org/professional-partner-content/7-ways-microlearning-engages-the-learners-of-today

[3] Bhatt, P. K., & Muduli, A. (2022). Artificial intelligence in learning and development: a systematic literature review. European Journal of Training and Development, 47(7/8), 677–694. https://doi.org/10.1108/ejtd-09-2021-0143

[4] Inclusive Design for a Digital World: Designing with Accessibility in Mind (Design Thinking): Gilbert, Regine M.: 9781484250150: Amazon.com: Books. (n.d.). https://www.amazon.com/Inclusive-Design-Digital-World-Accessibility/dp/148425015X

personalized follow-ups as necessary, demonstrates to participants that ongoing engagement and support are available to ensure their success.

By integrating these strategies, the program aims to address market barriers effectively, ensuring broad and inclusive participation while setting a benchmark for best practices in energy efficiency workforce development.

Key Software Tools for Learn Program Implementation

To ensure the successful delivery of our Technical Upskill training and education, the LEARN program will leverage a suite of advanced software tools designed to enhance user engagement, content accessibility and learning efficiency. These tools have been carefully selected for their proven effectiveness in creating an intuitive, interactive, and inclusive learning environment:

- **Docebo Learning Management Software:** A leading user and mobile-friendly LMS known for its intuitive design. Docebo supports delivering comprehensive training programs, ensuring easy access and a seamless participant learning experience.

  Role in Strategy: Docebo will be the backbone of our online training delivery, enabling efficient management of courses, learners, and results tracking.

- **Articulate Suite (Especially Rise):** A powerful instructional design platform that includes the software tool Rise, specifically geared towards facilitating the development of microlearning content. Articulate Suite allows for the creation of engaging, interactive courses tailored to the needs of adult learners.

  Role in Strategy: Articulate Suite will be utilized for developing concise, impactful microlearning modules that support quick learning and retention, aligning with our strategy for flexible, bite-sized education.

- **Amuse Labs:** Innovative puzzle-making software that provides an alternative approach to learning by engaging participants through interactive puzzles. This tool introduces an element of fun and challenge, enhancing learner engagement.

  Role in Strategy: Amuse Labs will be used to create interactive learning opportunities and stimulating engagement.

- **Shorthand:** A microlearning content development tool known for its "scrollytelling" capability, which combines scrolling with storytelling for an immersive learning experience. Shorthand enables the creation of visually rich, engaging content that captures learners' attention.

  Role in Strategy: Shorthand will facilitate the production of captivating, scrolly learning content that enhances engagement and facilitates the absorption of complex information in an accessible format.

- **Eleven Labs:** Advanced AI software specializing in video translation, making it possible to translate video content into Spanish efficiently. This tool enhances the accessibility of our training materials for Spanish-speaking participants.

  Role in Strategy: Eleven Labs will be instrumental in broadening our program reach, ensuring that our Spanish-speaking learners have equal access to training materials, thereby promoting inclusivity and removing language barriers.

- **ThingLink:** An innovative interactive media platform that enables users to create and share rich visual content, such as images, videos, and virtual tours, annotated with informative tags, links, videos, and audio. Its intuitive interface allows for the easy embedding of multimedia resources to make educational content more engaging and informative.

  Role in Strategy: ThingLink will create immersive learning experiences that can visually captivate learners, making complex concepts easier to understand and retain. Its use will not only make the learning experience more engaging but also support the program's goal of delivering accessible, high-quality education that resonates with adult learners across diverse educational backgrounds.

By integrating these software tools into the LEARN program's strategy and implementation, we aim to create a dynamic, engaging and accessible learning environment that meets the diverse needs of our participants, ensuring that everyone can benefit from our training offerings.

4. Innovation

The LEARN program is utilizing innovative learning strategies and tools, seamlessly blending technology with personalized educational experiences. By leveraging key software tools and artificial intelligence (AI), LEARN offers training and education that is not only flexible and mobile-friendly but deeply engaging and interactive.

Our approach includes the integration of video-based microlearning, animations, and simulations, all designed to make complex concepts more accessible and memorable. To reinforce learning and self-assessment, interactive visual quizzes and puzzles will enable participants to gauge their understanding immediately after engaging with the content. Live participatory webinars will further enrich the learning experience, utilizing breakout rooms for small group discussions and collaborative whiteboards for real-time brainstorming and problem-solving.

The program's website serves as a central hub, offering detailed career pathway maps and informative resources such as PDFs and immersive 360-degree walkthroughs of an energy-efficient home, complete with embedded videos and consumer checklists. This comprehensive resource platform is designed to support learners at every stage of their educational journey, from initial exploration to advanced specialization.

Central to our innovative approach is the use of AI within the Learning Management System (LMS) to deliver personalized learning experiences. By analyzing participants' viewing histories, the LMS can tailor course recommendations, ensuring that each learner's path is optimized for their interests and educational needs. This capability extends to skill-tagging and content auto-tagging, facilitating a highly customized and relevant learning environment.

The LEARN website will feature a user-friendly portal to the LMS, clearly delineating various market sector pathways and energy efficiency education maps. These features aim to guide learners through their career growth pathways with ease, supported by "Learn more" pages that offer deep dives into related topics, programs, and partner websites.

Furthermore, the program's commitment to innovation is evident in its strategic use of AI for informed reporting, feedback, and targeted engagement. By gathering detailed metrics on collaborations, participant demographics, and engagement levels, LEARN can continuously refine and expand offerings, ensuring they remain at the forefront of energy efficiency education.

To ensure training meets the needs of the rapidly evolving energy efficiency industry, RHA will first inventory existing content[5] from the Company, local/statewide programs and educational partners. RHA will then locate gaps to determine additional content needed, review priorities with SDG&E, and work with partners and Subject Matter Experts (SMEs) to develop tailored training and educational content for workers and customers across all sectors and segments as it relates to energy efficiency and electrification.

5. Metrics:

To gauge the effectiveness and impact of our program, it is crucial to track and evaluate specific metrics that reflect our core objectives and operational efficiency. The selection of these metrics is driven by the need to understand participant engagement, market sector representation and the inclusivity of our offerings. By monitoring the number of attendees across residential and non-residential sectors and the participation of disadvantaged workers, we aim to ensure our program is accessible and relevant to a diverse audience.

Additionally, evaluating participant feedback through course surveys and monitoring our collaborations with our training and industry partners allows us to assess the quality and reach of our training content. Tracking CEEC collaborations enables us to monitor the effectiveness of our partnerships with educational organizations. Website engagement metrics further provide insights into our program's visibility and the effectiveness of our digital outreach. Together, these metrics form a holistic view of our program's success, enabling us to identify strengths, address areas for improvement and ultimately drive positive outcomes for all stakeholders involved.

Note: Please see for quantitative data relevant to Key Performance Indicators.

Table 5: Metrics Tracked and Data Source

Tracked Items	Evaluation Data Gathered From
Number of attendees/participants by residential sector that attend trainings	Data pulled from LMS, collected when participant registers
Number of attendees/participants by non-residential sector that attend trainings	Data pulled from LMS, collected when participant registers
Percentage of Technical Upskill participants from each market sector	Data pulled from LMS, collected when participant registers
Percentage of participants relative to eligible target population for curriculum	Data pulled from LMS, collected when participant registers
Percentage of total WE&T IEET training program participants who meet the definition of disadvantaged worker based on Cal-Enviroscreen 4.0	Data pulled from LMS, collected when participant registers
Number of collaborations with training partners by industry sector	Documentation of activities with training partners, stored in RHA database
Course feedback survey scores	Data pulled from LMS

[5] Content is defined as 2023 title of classes and descriptions. Presentations, curriculum, and training material is not owned by Company and Implementer cannot use it for their own purpose.

Number of collaborations with CEEC partners	Collaboration agreements stored in RHA database
Website views	Website analytics, stored in RHA database
Click-throughs to partner websites	Website analytics, stored in RHA database
Percentage of trainings delivered by market sector	Data pulled from LMS
Number of enhanced course content and other support activities delivered to CEEC collaborators	Activity and resource delivery logs stored in RHA database
Invoicing and billing accuracy	All information stored in and pulled from RHA database

6. For Programs claiming to-code savings:
Not applicable for this program.

7. Pilots:
Not applicable for this program.

8. Workforce Education and Training:[6]
The LEARN program is a WE&T program and, at its core, supports workforce education and training by providing a wide range of free energy efficiency and electrification content in easily accessible, engaging, contemporary formats to workers seeking energy efficiency upskilling (engineering, design, trade professionals, contractors, etc.) and customers who could benefit from energy efficiency education (homeowners, tenants, building owners, property/facility managers, business owners. The LEARN program also supports student education at educational organizations.

Partnerships with workforce training programs
By collaborating with existing workforce training programs, we aim to extend our reach and impact. Our partnerships will focus on promoting and marketing our courses to their clients, unlocking new training opportunities and enhancing the workforce's skill sets.

Outreach through CBOs
To engage DAWs, we will work closely with CBOs. Our collaboration will focus on ensuring access to nationally recognized certifications, free of charge to DAW participants. This initiative is pivotal in breaking down barriers to professional advancement and certification for those in underserved communities.

Establishing ongoing relationships with educational organizations
We are committed to forging lasting partnerships with various educational institutions, including community colleges, four-year universities, job training organizations, vocational schools and trade associations. These relationships will provide these organizations with training opportunities for their staff and students. Additionally, we will supply resources, including textbooks, demonstration units, industry standards, codes, technical manuals and guides, to enrich the educational landscape and support the development of a skilled, informed workforce.

Collaboration with industry groups to share training resources
Recognizing the value of broad-based industry collaboration, the LEARN program will also

[6] D.18-05-041, page 20-21 and Ordering Paragraph 7

establish partnerships with key industry groups to share training resources and leverage collective expertise. This collaboration will not only enhance the quality and diversity of our training materials but also amplify our outreach efforts. By pooling resources and promoting each other's materials, we aim to create a more cohesive and comprehensive educational ecosystem that benefits all stakeholders. These industry partnerships will facilitate access to the latest industry trends, standards and practices, ensuring that our training programs remain at the forefront of the energy efficiency and electrification fields. Through this collaborative approach, we aim to dismantle barriers to entry and advancement in the energy efficiency sector, creating a more inclusive and dynamic workforce.

9. Workforce Standards:[7]

Workforce standards required by the LEARN program include the following:

- All educational content will align with industry guidelines and standards.
- All trainers will hold relevant industry and/or safety certifications if relevant to the course content. Trainer resumes and certifications will be stored in the RHA Industry database.

10. Disadvantaged Worker Plan:[13]

The LEARN program will coordinate with workforce readiness initiatives focusing on DAWs, aiming to complement and extend their efforts to provide DAWs with enhanced access to career opportunities within the energy efficiency and electrification industry.

We recognize that duplication of efforts in the DAW space can dilute the impact of support provided to disadvantaged workers. Understanding the critical importance of coordinating our efforts, our strategy focuses on complementing and enhancing the work of organizations already making significant strides in this area.

Our approach includes identifying opportunities where our resources, training programs and certifications can fill gaps rather than overlap with existing services.

This support may manifest in various forms, including sharing educational content, offering access to our training materials for use in existing programs or providing no-cost certifications that can add value to the skill sets developed through other organizations' initiatives.

Metrics Used

To track DAWs in the LEARN program, zip codes will be collected as participants register for courses. The percentage of total WE&T IEET training program participants who meet the definition of disadvantaged worker will be calculated based on zip codes from Cal-Enviroscreen 4.0.

11. Additional information:

None

[7] D.18-10-008, Ordering Paragraph 1-2 and Attachment B, Section A-B, page B-1.

Supporting Documents

Attach the following documents (in PDF format):

1. **Program Manuals and Program Rules**
2. **Program Theory[8] and Program Logic Model[9]:** Program Theory and Logic Models should visually explain underlying program theory supporting the sub-program intervention approach, referring as needed to the relevant literature (e.g., past evaluations, best practices documents, journal articles, books, etc.).

3. **Process Flow Chart:** Provide a program or, if applicable, a sub-program process flow chart that describes the administrative and procedural components of the sub-program. For example, the flow chart might describe a how a customer submits an application, how the implementer screens the application, the application approval/disapproval process, verification of purchase or installation, incentive processing and payment, and any quality control activities.

4. **Incentive Tables, Workpapers, Software Tools:** Provide a summary table of measures and incentive levels, along with links to the associated workpapers.

   N/A

5. **Quantitative Program Targets**: Provide estimated quantitative information on number of projects, companies, non-incentive customer services and/or incentives that program aims to deliver and/or complete annually. Provide references where available.[13]

6. **Diagram of Program**: Provide a one-page diagram of the program including sub-programs. This should visually illustrate the program/sub-program linkages to areas such as:
   - **a.** Statewide and individual IOU marketing and outreach
   - **b.** Workforce Education & Training programs
   - **c.** Emerging Technologies and Codes and Standards
   - **d.** Integrated efforts across demand-side management programs

7. **Evaluation, Measurement & Verification (EM&V):** Describe any process evaluation or other evaluation efforts that the program administrator (PA) or program implementor (PI) will undertake to identify the evaluation needs that the must be built into the program, clearly identifying who will be responsible for which evaluation activity.

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[8] The expected causal relationships between program goals and program activities in a way that allows the reader to understand why the proposed program activities are expected to result in the accomplishment of the program goals. A well-developed program theory can (and should) also describe the barriers that will be overcome in order to accomplish the goals and clearly describe how the program activities are expected to overcome those barriers. California Evaluation Framework, June 2004.

[9] The graphical representation of the program theory showing the flow between activities, their outputs, and subsequent short-term, intermediate, and long-term outcomes. California Evaluation Framework, June 2004.

8. **Normalized Metered Energy Consumption (NMEC):** If NMEC is applicable please include a detailed Program-level M&V plan, as called for in the most recently updated NMEC Rulebook.

   N/A

9. **Marketing Plan**

10. **Quality Assurance Plan**

Attachment 1: Program Manuals and Program Rules

1.1 Policy and Procedures Manual

1. Invoicing and Reporting

A. Overview of the Reporting and Invoicing Process

Objective: To ensure timely, accurate and compliant invoicing and reporting for the LEARN program services provided to SDG&E.

Scope: This covers all financial transactions, program reporting and document retention related to the LEARN program.

i. Monthly Reporting Requirements

Monthly Invoicing Procedure: Monthly invoicing includes the following items with supporting documentation:

- CEEC participant fees
- Technical Upskill participation fees
- Operational support
- Course development
- DAW certification fees
- Marketing development and implementation pay for deliveries
- Any other tasks as requested by SDG&E

The invoice will be prepared by the Manager based on the appropriate budget line-item details.

Electronic Submission: The report shall initially be submitted to SDG&E by email, specifically the Electronic Data Transfer (EDT) site, using a provided file EXCEL template. This template shall be completed in full. All findings on the required tabs will follow a standardized format. In addition, there shall be no hidden formulas in the spreadsheet, and references shall be listed for any formulas used. All project-level findings and supporting information will be submitted via SDG&E's Energy Efficiency Collaboration Platform (EECP) system.

A back-up PDF invoice with supporting documentation will also be sent to SDG&E.

Approval Process: Invoices are prepared by the Program Operations Manager and reviewed and approved by the Program Manager. The RHA Controller then completes a final review and approval before submission to SDG&E.

Submission Timeline: 7th business day after the previous month.

ii. Monthly Program Reporting

Content: Monthly program reporting will include the following items with supporting documentation:

A forecast of the monthly spend, accruals and commitments

A summary of the results and status of the LEARN program. This will include a narrative of all activities related to outreach to industry partners, marketing, CBO grantees, CEEC participation, Technical Upskill participation, DAW certifications, customer satisfaction surveys and continuous improvement activities, customer complaints and key performance indicators

Information on any DBE contractors hired, added to the sempra.com database

Format and Submission: Monthly reporting must include the program ID and name. All reporting will use the SDG&E Energy Efficiency Collaboration Platform (EECP) system.

Deadline: By the 10th business day after the preceding month.

iii. Quarterly Reporting Requirements

The quarterly program reporting will outline the prior quarter's activities, accomplishments and expenditures, including all items in the monthly reporting, with supporting documentation. This report will also include:

- Administrative activities
- Implementer's assessment of program performance and status
- Status of program achievements
- Any revisions to program theory and logic model
- Key performance indicators summary for the quarter
- Customer satisfaction from surveys for the quarter

Budgets:

- Annual program budget
- Total expenditures reported for the quarter and year-to-date (billed amounts and percentages using the cost categories below):
    - Administrative costs
    - Marketing/advertising/outreach costs
    - Non-incentive direct implementation costs
    - Incentive direct implementation costs
- Total forecast/commitments (year-to-date dollar amounts and percentages using the cost categories below):
    - Administrative costs
    - Marketing/advertising/outreach costs
    - Non-incentive direct implementation costs
    - Incentive direct implementation costs

Job Creation as a Result of Program: Any new job position descriptions are sent to SDG&E.

Format and Submission: Must include program ID and name. All reporting will use the SDG&E Energy Efficiency Collaboration Platform (EECP)system.

Deadline: 10th calendar day of January (for the preceding year), April, July and October.

iv. Annual Reporting Requirements

Content: To include all information to fulfill the CPUC annual reporting obligations for the program.

Format and Submission: All reporting will use the SDG&E Energy Efficiency Collaboration Platform (EECP) system.

Deadline: 10th business day of January of each year

v. Document Retention Policy

Documents to be Retained: All LEARN program documentation, including subcontracts, subcontractor invoices, subcontractor expense receipts, presentation/training material, student handouts, instructor manuals, attendance lists, customer satisfaction results and marketing materials.

Retention Period: Program related material is kept for the duration of the contract. Historical program data is kept for 4 years.

Storage and Security: All documents are stored in the RHA Industry database as digital copies. We leverage secure and encrypted connections to all externally hosted systems. Our web applications are stored in Azure and the data is encrypted in transmission and at rest.

Access Control: Access is granted on a least privileged basis by an administrator of the system. Access is role-based and granted to individuals with unique login credentials.

vi. Ad-hoc Reporting Procedure

Request Process: SDG&E may require RHA to provide other reports and documentation as necessary. RHA will comply with all such requests within a reasonable time or in a specified timeframe if required by the CPUC.

vii. Compliance and Auditing

Compliance Standards: RHA maintains financial records according to the Generally Accepted Accounting Principles and complies with all other applicable laws and regulations. The financial statements are audited annually.

Auditing Process: Each invoice is prepared and reviewed by the manager/ director of the program, and then a secondary review is performed by accounting to ensure accuracy and contract compliance.

viii. Amendments and Updates

Procedure for Updates: These policies and procedures will be reviewed annually and updated as necessary.

ix. Contact Information

Support Contacts:

Alex Kaiser. Controller akaiser@rhainc.com
Amanda Hatherly. LEARN Program Manager. Ahatherly@rhainc.com
Jackie Kembi. LEARN Program Operations Manager. Jkembi@rhainc.com

B. Template Examples

Figure 1. LEARN Program Invoice Template

RHA delivering solutions

LEARN

Richard Heath & Associates Inc
590 W LOCUST, Unit: 103
FRESNO, CA 93650
Phone Number: 559-447-7023
Email: akaiser@rhainc.com

Bill To:

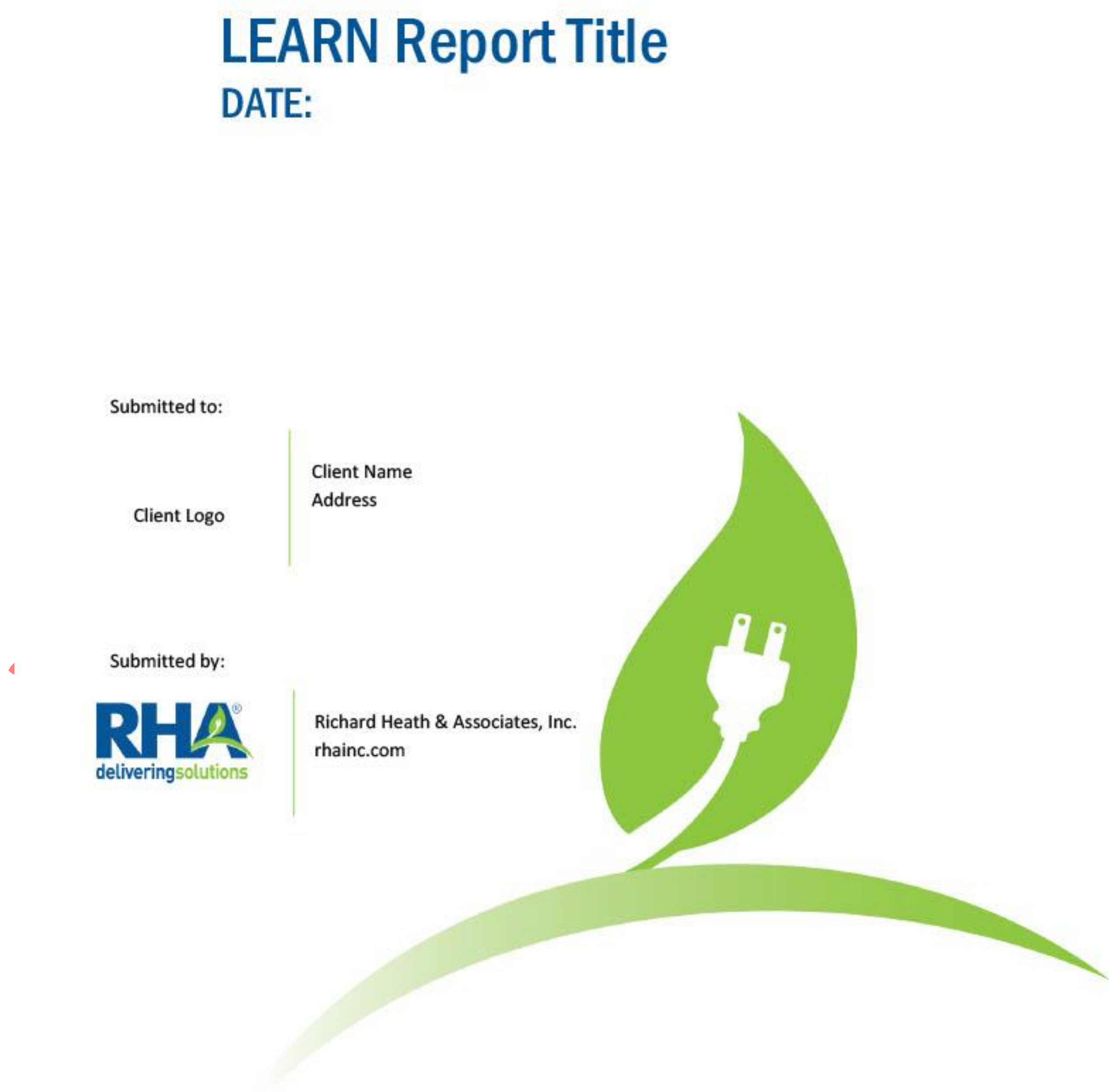
Invoice #:
Invoice Date:
Purchase Order:

Start 2024: 2/11/2024
End 2024: 12/31/2024
Annual NTE:
Remaining Balance:

LEARN PROGRAM # 1234567

Category	Description	Units	NTE Amount	Line Total	Amount
					$0.00
					$0.00
					$0.00
					$0.00
					$0.00
					$0.00
	Total	#DIV/0!	$0.00	**Sub-Total**	**$0.00**
				Shipping & Handling	**$0.00**
				Tax	**$0.00**
				****Total Cost**	**$0.00**

Figure 2. LEARN Program Report Template



LEARN Report Title

DATE:

Submitted to:

Client Logo

Client Name
Address

Submitted by:

RHA deliveringsolutions

Richard Heath & Associates, Inc.
rhainc.com

REPORT TITLE

TABLE OF CONTENTS

1. MONTHLY / QUARTERLY / ANNUAL ACTIVITY OVERVIEW

Add in an overview of the activities for the timeframe.

Monthly Program Reporting will include the following items, with supporting documentation:

- A forecast of the monthly spend, accruals and commitments.
- A summary of the results and status of the LEARN program. Include narrative of all activities related to: Outreach to industry partners, marketing, CBO Grantees, CEEC participation, Technical Upskill participation, DW Certifications, Customer satisfaction surveys and continuous improvement activities, Customer complaints and Key Performance Indicators.
- Information on any DBE contractors hired, added to the sempra.com database

The **quarterly** program reporting will outline the prior quarter's activities, accomplishments, and expenditures, including all items in the monthly reporting, with supporting documentation. This report will also include:

- Administrative Activities
- Implementer's Assessment of Program Performance and Status
- Status of Program Achievements
- Any revisions to Program Theory and Logic Model
- Key Performance Indicators Summary for the Quarter
- Customer Satisfaction from Surveys for the Quarter

Budgets:

1. Annual Program Budget
2. Total Expenditures reported for the quarter and year-to-date (billed amounts and percentages using the cost categories below);
   i. Administrative Costs;
   ii. Marketing/Advertising/Outreach Costs,
   iii. Non-Incentive Direct Implementation Costs, and
   iv. Incentive Direct Implementation Costs.
3. Total forecast/commitments (year-to-date dollar amounts and percentages using the cost categories below);
   i. Administrative Costs;
   ii. Marketing/Advertising/Outreach Costs,
   iii. Non-Incentive Direct Implementation Costs, and
   iv. Incentive Direct Implementation Costs.

Job Creation as a Result of Program:

1. Any new job position descriptions are sent to the Company

Annual details to include all of the above, to fulfil CPUC reporting requirements.

2. MONTHLY / QUARTERLY / ANNUAL DETAILS

Add in the details for the above activities. Include as attachments all backup documentation (see above).

2. Submitting Final Program Report

Objective: To establish a standardized process for compiling and submitting a comprehensive final report at the conclusion of the contract, detailing program achievements, challenges, and lessons learned.

Scope: This policy applies to all team members involved in the program, including project managers, coordinators, and any other staff responsible for program implementation and documentation.

A. Final Report Timeline

The final report must be submitted within 60 calendar days of the end of the program. A timeline for report preparation will be established, with sufficient time for data collection, writing, review and revisions.

B. Report Content and Structure

The report is intended to summarize the program's activities and results. It will include an executive summary, program objectives, activities conducted, outcomes achieved, evaluation results, challenges faced, lessons learned and recommendations for future initiatives.

C. Data Collection

Data will be compiled from program databases, interviews, surveys and feedback. All team members will contribute to the report, providing insights and reflections on their areas of responsibility. Feedback from stakeholders and partners will be incorporated where relevant.

D. Review and Approval

An internal review of the draft report will be done to ensure accuracy and completeness. The final draft will be approved by the Vice President and Program Manager before submission.

E. Submission

The report will be submitted electronically using Microsoft Office software, and a confirmation of receipt will be filed.

F. Archiving

The LEARN program will retain a copy of the final report in the program's records.

3. Marketing Policies and Procedures

A. Overview of Marketing Policies

Purpose: This document outlines a structured approach for marketing activities, ensuring alignment with the LEARN program's goals and strategic objectives. It provides guidelines for preparing, distributing, developing, and implementing marketing strategies.

Scope: This policy ensures consistency in marketing efforts and includes guidelines for preparing, distributing, developing, and implementing marketing strategies.

i. Prepare and Distribute Marketing Collateral

The Marketing and Outreach Manager will be responsible for collateral creation, adhering to approved branding guidelines and emphasizing clarity, consistency and inclusiveness in line with the LEARN program goals.

Collateral Creation: Collateral creation involves various materials such as brochures, flyers, posters, banners and digital graphics. The Marketing and Outreach Manager will ensure accuracy, compliance, and alignment with brand standards. To reach the desired target audience, RHA will select distribution channels, including print media, digital platforms, email campaigns, social media, and events, based on audience preferences and behavior.

Evaluation: Metrics and analytics tools are used to track marketing collateral distribution and performance. Regular evaluations are necessary to inform adjustments to distribution strategies.

Legal and Compliance Considerations: Marketing collateral must comply with all relevant laws, regulations, and industry standards, including advertising standards, data privacy and intellectual property rights.

Review and Approval Process: Before material distribution to CBOs and industry partners, the Marketing and Outreach Manager will receive necessary input and approvals from SGD&E to proceed. Approval of materials must allow a minimum of three full business days for review, not to exceed five business days. If changes are required, three full business days, not to exceed five business days, are required for subsequent reviews.

ii. Develop and Implement Social Media Strategy

Market research shall be conducted to identify the target audience and the appropriate platforms to use.

- **Social Media Goals & Objectives:** The social media goals must be aligned with overall marketing and program objectives. A comprehensive analysis shall be conducted to set specific, measurable, achievable, relevant and time-bound objectives.
- **Content Creation and Calendar:** A content calendar will be created to define the post types, frequencies and themes. The posts shall remain consistent in brand voice and visual elements.
- **Brand Guidelines and Messaging:** Adhering to brand guidelines will support a consistent brand image that aligns with the values of the LEARN program. Messaging guidelines shall be cohesive across all platforms, including branding, introductory messages, tone, language and style.
- **Virtual Engagement and Community Management:** Positive engagement shall be encouraged, and Marketing and Outreach Manager will respond promptly to comments and messages, actively participate in discussions, and manage community guidelines.

- **Monitoring and Analytics:** Social media channels shall be monitored for brand mentions and industry trends. Analytics tools will be used to measure the performance of social media efforts, analyze data and make data-driven recommendations.

iii. Outreach to Industry Partners

The objective is to ensure that industry partner outreach aligns with overall marketing and LEARN Program objectives.

Target Identification: Potential industry partners will be identified and prioritized based on alignment with LEARN program goals. The industry partners' relevance, influence and alignment with strategic objectives will be taken into consideration prior to forming partnerships.

Personalized Communication: A personalized approach will be developed when communicating with industry partners. Outreach messages will be tailored toward individual partners to emphasize the unique benefits of collaboration with the LEARN program.

Relationship Building: Relationships with industry partners will be established and nurtured through meaningful communication and ongoing support to foster long-term partnerships. Regular check-ins will allow for transparent communication and feedback to enhance the partnership experience.

Event Participation: Active participation in industry events will support LEARN program visibility and provide networking opportunities. Relevant events will be identified, followed by participation strategies to ensure the LEARN program is well-represented to maximize the networking potential and program reach.

Metrics and Evaluation: Key performance indicators are established to track industry partner outreach and collaboration. Outreach efforts' effectiveness will be assessed through metrics like number of partnerships and partner satisfaction.

Documentation and Reporting: Comprehensive documentation of industry partner interactions will be housed in RHA Industry, allowing reporting tools to track the progress and success of industry partnerships.

Cross-Promotional Opportunities: Cross promotional activities mutually beneficial for the LEARN program and its partners will be identified and assessed to extend the program's reach.

iv. Implement Overall Marketing Strategy

Marketing efforts will be aligned with the LEARN program goals for consistency and cohesion. The strategy will be regularly assessed based on performance data to achieve respective goals.

Strategic Alignment: All marketing initiatives will align with the overall LEARN program strategy. Regular review of goals and objectives will help adjust marketing strategies to remain in alignment with the LEARN program.

Market Research and Analysis: Thorough market research shall be conducted to inform marketing decisions. Market trends, customer behavior and industry landscape will be regularly analyzed to make data-driven decisions.

Brand Consistency: Consistent branding shall be maintained across all marketing channels. Brand guidelines and branding materials will be regularly reviewed to ensure cohesive messaging.

Target Audience: The target audience will be segmented based on demographics, behaviors and preferences to tailor marketing messages effectively.

Integrated Marketing Approach: A mix of offline and online channels will be implemented to reach the desired audience.

Budget Allocation: The marketing budget will be reviewed monthly to ensure resources are allocated efficiently and effectively.

Campaign Planning and Execution: Marketing campaigns shall be planned and executed with clear objectives. Detailed campaign plans, including timelines, target metrics and KPIs, will provide clarity and direction.

Performance Measurement: Metrics shall be established to measure the success of marketing efforts (see Attachment 9: Marketing Plan
). Regular reviews of KPIs will be scheduled to analyze and adjust strategies based on performance data.

Customer Feedback Integration: A continuous improvement loop created to integrate customer feedback into the program.

v. Engage CBO Mini-grantees for DAW No-Cost Certification Participation

The Marketing and Outreach Manager will lead the engagement of CBO mini-grantees for DAW no-cost certification participation. Potential candidates will be considered and assessed for qualification before receiving certification support.

Identification of Potential Candidates: After thorough market research has been conducted, potential candidates for the mini-grants will be identified and awarded.

Requirements and Expectations: Requirements and expectations shall be defined and communicated to mini-grantee recipients. A comprehensive document outlining the requirements and expectations will be provided to the recipient, ensuring clarity and transparency.

Relationship Building: Relationships with mini-grantee recipients will be established and nurtured through meaningful communication and ongoing support to foster long-term partnerships. Regular check-ins will allow for transparent communication and support for CBOs to encourage DAW participants to utilize the LEARN certification program to enhance their technical skills.

4. Workforce Education and Training Participation

A. CEEC Participation

Overview of Collaboration Agreements

Purpose: Outline the process for establishing collaboration agreements with CEEC providers to enhance their training programs with energy efficiency and electrification resources.

Scope: Includes all activities related to initiating, documenting, tracking, and managing collaboration agreements.

i. Identification of Potential Collaborators and Content

The LEARN CEEC program will target community colleges, four-year colleges, job training organizations, vocational schools and trade associations in the San Diego area. This will include certificate, continuing education and contract training programs.

The Program Manager will leverage existing connections and develop new connections to form partnerships with organizations offering educational pathways aligned with program goals.

A gap analysis survey will be sent to each collaborating organization to gauge interest in different energy efficiency and electrification topics and to guide CEEC offerings.

ii. Agreement Template and Email Procedure

The LEARN program will use the approved Collaboration Agreement template provided by SDG&E to obtain agreement from all parties involved. Signed Collaboration Agreements can be exchanged via email or as a hard copy. SDG&E may modify the template and provide the LEARN program with the latest template as needed.

iii. Documentation and Tracking

All Collaboration Agreements will be stored in the RHA LEARN database and reported monthly to SDG&E. Contact information, status updates, collaboration details and timelines of deliverables, including completion dates, will be stored in the RHA LEARN database and reported monthly.

iv. Collaboration Content

Collaboration content will include (but is not exclusive of) the following:

- Instructional resources, including textbooks, demonstration units, industry standards, codes, technical manuals and guides. Specific short webinars from industry experts may also be arranged.
- Train-the-trainer webinars, utilizing Technical Upskill content, will offer CEEC instructors short modular curricula components to embed into their current curricula. This allows instructors to update and refresh current course content. Train-the-trainer opportunities will include PowerPoints, instructor outlines, student guides and other course materials.
- Additional technical training on the LEARN LMS will be accessible to CEEC students.

All collaborative content offerings will be approved by SDG&E beforehand and will meet industry standards and educational objectives.

v. Quality Assurance

At least annually, the LEARN program will request feedback from all collaboration partners to ensure the collaborations are meeting their needs and objectives. At least annually, the LEARN program will review all offerings to ensure they are maintaining quality standards.

vi. Contact Information and Support

Amanda Hatherly. ahatherly@rhainc.com, 505-690-2603

vii. CEEC Collaboration Agreement Template

Figure 3: CEEC Collaboration Agreement Template

RHA LEARN Workforce Education and Training (WE&T) Statement of Collaboration

Collaboration Name:	
Target Audience:	
Collaborating Org.(s):	
Collaborating Lead Name, Title, and Contact Information:	
RHA Lead Contact Info:	First Last, email, phone

As part of its efforts to prepare California's energy workforce to meet California's, RHA's and customers' energy efficiency and greenhouse gas reduction goals, RHA LEARN program will collaborate with professional/trade organizations and education/training institutions to leverage each other's strengths and resources. The overarching goals of these collaborations, include expanding one or both organization's reach; and introducing, enhancing, or expanding relevant training content; expanding awareness of jobs and careers in energy efficiency, electrification, decarbonization demand response, and distributed generation.

Collaboration Type, Outcomes, and Outputs

This Collaboration is intended to achieve the following **outcomes** with the associated quantifiable **outputs**.

Collaboration Type	Outcomes	Quantifiable Outputs	Reporting Lead
Curriculum Development	▪ Adoption of training materials by educators ▪ Use of training materials by educational organizations	▪ Number of educational institutions or organizations using materials developed ▪ Number of trainers using materials ▪ Number of topics covered by training materials (HVACR, lighting, etc.)	RHA
		▪ Number of students attending trainings where materials are utilized ▪ Number of Disadvantaged Workers attending trainings where materials are utilized	TBD
Student Awareness	▪ Awareness of EE career opportunities ▪ Participation in technical trainings ▪ Interest in jobs in the EE industry ▪ Knowledge gain of energy efficiency concepts and skills.	▪ Number of students aware of careers that have opportunities to apply EE skills ▪ Number of students considering a career that has opportunities to apply EE skills ▪ Measure of student knowledge and skills related to EE concepts ▪ Number of students enrolling in additional WE&T training	RHA

Collaboration Type	Outcomes	Quantifiable Outputs	Reporting Lead
Technical Training	▪ Participation in technical/EE training ▪ Knowledge gain of energy efficiency concepts and skills. Interest in jobs in the EE industry	▪ Number of technical trainings offered ▪ Percent of participation relative to eligible target populations	RHA
		▪ Number of attendees at trainings offered by Business Plan sector ▪ Number of disadvantaged worker attendees	TBD
Training Capacity	▪ Adoption of training materials by educators Availability of educators knowledgeable about specific EE topics	▪ Number of trainers directly trained ▪ Number of educators knowledgeable about specific EE topics available to teach courses ▪ Number of training opportunities promoted by Business Plan sector	TBD
Tools and Equipment Loans	▪ Awareness of, familiarity with, and use of tools and equipment in projects	▪ Number of tools and equipment loaned ▪ Number of loan transactions ▪ Number of first-time tool and equipment borrowers ▪ Number of repeat tool and equipment borrowers ▪ Number of days of training using specialized PG&E facilities	TBD
Certifications	▪ Knowledge gain of energy efficiency concepts and skills.	▪ Number of trainings offered ▪ Number of attendees ▪ Number of attendees who received certification upon completion of the course	TBD

RHA LEARN WE&T will perform/provide the following:

1. Provide curriculum development and technical training delivery of TBD workshops. Including in-house or contracted subject matter experts to teach TBD sessions and updated training material.
2. Assist in marketing the training sessions to qualified candidates in RHA LEARN WE&T contact database.
3. Administer and track post-course evaluations conducted at the conclusion of each workshop to survey the participants regarding awareness of careers that have opportunities to apply EE skills, number of participants currently in or considering a career that has opportunities to apply EE skills, and self-reported measure of participant knowledge and skills related to EE concepts.
4. Provide an online survey to the Collaboration Partner at regular intervals to collect information about how the Collaboration can be improved.
5. Distribute information to participants about other WE&T training opportunities.
6. Maintain a communication plan outlining due dates for deliverables, reporting milestones and regularly occurring coordination meetings with the Collaboration Partner(s).
7. Conduct a lessons-learned session with the Collaboration Partner(s) at the completion of the Collaboration.
8. Host the technical training sessions online or at TBD

Collaboration Partner(s) will perform/provide the following:

1. Identify and recruit through Marketing and Outreach, a minimum of 50 participants with a focus on Disadvantaged Workers or other underserved populations.
2. Host the technical training sessions online or at TBD.
3. Administer and track participant sign in and required releases, if applicable.
4. Provide RHA with monthly updates on marketing and registration.
5. Provide final attendance figures to RHA including participant name, email, employer name (if applicable), home zip code, occupation……
6. Attend regularly occurring coordination meetings hosted by RHA
7. Attend a lessons-learned session hosted by RHA at the completion of the Collaboration.

B. WE&T Technical Upskill Participation

Overview of Technical Upskill
Purpose: To provide comprehensive energy efficiency training to a diverse target audience, including trade professionals, utility customers and other market actors.

Scope: Involves designing, developing and delivering training materials, including webinars and self-paced courses in English and Spanish. LEARN content will be free to the participant. Subsidies for courses outside of the LEARN program may be offered.

i. Participant Tracking

LEARN program participants will be tracked in the following ways:

- A sign-in to a course or webinar through the LEARN LMS, with name, email and zip code
- A sign-in to a LEARN partner LMS or webinar, with name, email and zip code
- Optional sign-in information gathered includes topic of interest, level of content and professional field

ii. Participant Records

On a monthly basis, the LEARN program will track and report the number of participants who have taken part in trainings. This will be reported as:

- The number of participants in the program
- The number of new "unique" participants in the program
- The zip code of participants

iii. Participant Outreach

Please see the Marketing and Outreach Plan and related activities (Attachment 9: Marketing Plan).

iv. Training Partner Handbook

Please see Attachment 1: Program Manuals and Program Rules for all policies and procedures related to Technical Upskill training.

C. Database Operation Support, Course Development and DAW fees

Database Operation Support
The LEARN program uses the RHA Industry database to track and report on all aspects of the program. The information collected includes:

- Customer data fields from the LMS, including unique customer ID, disadvantaged worker status (collected through zip code entry), main area of interest and professional information
- Course evaluation data

- Collaborations with CEEC partners, industry partners and CBOs, including contact information and all outreach and engagement activities
- Training partner contact information
- Tracked course development and delivery
- Tracked goals and KPIs
- Copies of curricula and other supporting documents
- Copies of all marketing materials

RHA Industry enables the LEARN program to run data queries and export data for program reporting and invoicing.

RHA places a high value on protecting confidential customer data and other information for our clients. As such, we embed data security into the core design of all our systems and processes. RHA's specific efforts to maintain data security and adhere to relevant security requirements include:

- Training all users on the importance of protecting confidential data. We define which data is confidential, explain the importance of keeping that data secure and require anyone with access to confidential customer data to execute a Non-Disclosure Agreement (tracked and renewed annually).
- Requiring all employees must pass background screening prior to hire.
- Using role-based security to limit customer data access to only those who need it for a required business purpose and for only the specific customers to whom they need access.
- Requiring each user to store data on devices secured with a unique and complex password. Passwords are changed at scheduled intervals to comply with industry best practices and SDG&E's data standards.
- Using multifactor authentication for user login. For internal systems, passwords are salted, hashed and encrypted with 512-bit encryption.
- Revoking immediately all security and access rights to our corporate network, databases and program applications upon employee termination.
- Protecting server-based data from unauthorized access by multiple layers of security, including actively managed corporate firewalls, locked and access-restricted server rooms, encrypted data storage, secure and encrypted data transfer and secure Microsoft Azure cloud storage. Data is stored in Azure cloud and follows the ISO 27001:2013 compliance standard. When we access the program database, we do so only over encrypted and secure channels.
- Using a third party for penetration and security testing and audits. A security audit report is provided to the Information Technology and Information Systems (IT/IS) director, and an action plan is developed when necessary.
- Removing customer information and associated files from the database in Azure's encrypted cloud structure based on contract and term requirements.
- Maintaining written security policies regarding data backup, business continuity and

disaster recovery.

- Following our notification policy in the event of a security breach or unauthorized access to customer information to inform SDG&E of the nature and circumstances of the breach and take immediate measures to stop unauthorized access or disclosure of confidential information.

These comprehensive security policy measures protect and secure confidential customer data.

Course Development
Please see Attachment 1.2 Training Partner Manual, for all policies and procedures related to the LEARN program and course development.

No Cost Certifications Trainings for DAW
Eligibility Criteria: Applicants must reside within specific zip codes identified as serving disadvantaged communities.

Application Process: Eligible individuals are encouraged to apply for no-cost certifications through an online form available on the LEARN LMS and sent as a digital link to participating CBOs and CEEC partners.

The application form will ask participants to confirm their zip code for eligibility as a DAW. Eligible zip codes are those identified in the Cal Enviro Screen Tool: https://oehha.ca.gov/calenviroscreen.

Applicants must indicate the specific certification exam they wish to take, including the certifying body and the desired examination date (if applicable). Applicants will confirm that they meet any pre-requisites for the exam.

Certification Exam Fee Waiver: Upon verification of eligibility and training completion, applicants will be approved for a certification exam fee waiver. The LEARN program will issue a unique waiver code or voucher to the applicant, which can be used to register for the exam without incurring fees.

Verification of Eligibility: LEARN staff will review submitted applications for completeness and verify the applicant's eligibility based on the documentation provided, including that any pre-requisites have been met. LEARN staff will communicate approval or request for additional information within a week of the application.

Issuance of Exam Fee Waivers: LEARN will generate a unique waiver code or voucher for each eligible applicant, specific to the certifying body and exam.

Coordination with Certifying Bodies: LEARN will work with certifying bodies to ensure that waiver codes/vouchers are acceptable and will request certifying bodies invoice the program directly for each exam taken using the waiver code or voucher.

Tracking and Reporting: LEARN's RHA Industry database will track the issuance and redemption of waiver codes or vouchers, including exam dates and the number of participants taking exams. This will be reported to SDG&E monthly.

Feedback and Continuous Improvement: LEARN will collect feedback from participants and certifying bodies on the process and any challenges encountered and use this to continuously improve the policies and procedures, ensuring the initiative remains accessible, efficient and effective in supporting DAWs.

Support: LEARN will ensure clear and accessible information about the no-cost DAW certification trainings initiative is available on the program's website, including eligibility criteria, application instructions, current certifications offered and FAQs.

There is dedicated support through email and phone for applicants requiring assistance with the application process or with questions about the program.

Contact: Crystal Dyer, cdyer@rhainc.com, 559-214-2505

D. Address and Resolve All Customer Issues

Customer Feedback Surveys

The LEARN program uses customer feedback surveys (also known as course evaluations) to gather feedback on overall and specific aspects of the course and program.

Following each live webinar, participants are sent a survey link to assess the course.

At the conclusion of courses within the LMS, participants are prompted to complete the survey, ensuring consistent feedback collection across all learning formats. Survey responses are kept anonymous to encourage honest feedback, although there is the option to add contact information if the participant has a specific comment to make that requires feedback. The survey content, including specific questions, is detailed in Attachment 1.2 Training Partner Manual.

The primary indicator of course quality, derived from the first survey question, is reported monthly to SDG&E. Achievement thresholds are set at a minimum of 90% of participants who complete surveys must rate the course as "Very Good" for basic goals, escalating to 95% for the attainment of specified KPIs.

Customer Satisfaction

The LEARN program pursues continuous improvement to promote customer satisfaction. All survey responses, including qualitative feedback, are used to improve courses and the program. Direct customer questions, feedback or complaints are addressed within 3 business days by telephone or email.

Feedback Management

The LEARN program keeps all customer feedback in the RHA Industry database, which tracks all dates and details related to communication on the item in question. This information is included in monthly reports to SDG&E, and cumulative information will be provided to SDG&E on a quarterly basis.

Resolution of Customer Complaints

Information regarding unresolved customer complaints is communicated to SDG&E within 5 business days. The LEARN program will immediately provide SDG&E with a detailed description of the complaint, including the name and contact information of the customer and any other information requested by SDG&E.

Continuous Improvement

LEARN is committed to fostering a culture of continuous improvement centered around the feedback and experiences of its customers. By regularly analyzing feedback and performance data, LEARN identifies areas for enhancement and implements targeted improvements to better meet the needs and expectations of its diverse audience. This customer-centric approach ensures that LEARN's programs and services evolve in alignment with the needs of its participants and customers. (**Error! Reference source not found.**

E. Shut Down Program

i. Draft Shutdown Plan Submission

Responsibility: The LEARN program is responsible for defining the shutdown requirements and developing a comprehensive plan outlining the procedures for the program's cessation.

Development: The LEARN program will compile a draft plan that details the steps, timelines, and responsibilities associated with winding down the program. This plan will include, but is not limited to, final reporting, customer communication strategies, data archiving and resource reallocation.

Submission: The draft plan will be submitted for SDG&E review 30 calendar days before the shutdown.

SDG&E Feedback: Upon receipt, SDG&E may provide specific directions or requests for adjustments to the shutdown activities and/or public announcements associated with the program's conclusion.

ii. Revisions to Shutdown Plan

Responsibility: The LEARN program shall incorporate feedback from SDG&E into the plan, refining the document to ensure it meets all stipulated requirements and addresses any concerns.

Review and Revision: The LEARN program will thoroughly review feedback and make necessary revisions.

Final Submission: The revised Shutdown Plan must be completed and submitted to SDG&E within 60 days of the program shutdown date.

Approval: The final Shutdown Plan and the completed project results require SDG&E approval to ensure compliance with all specified directives and standards.

iii. Implementing the Shutdown Plan

Responsibility: The LEARN program will execute the Shutdown Plan for a smooth, orderly program closure.

Execution: The LEARN program will carry out the shutdown activities as outlined in the approved Shutdown Plan, ensuring that all steps are completed within the specified timelines.

Minimizing Impact: Special consideration will be given to strategies that mitigate adverse effects on customers and the market. This includes clear communication with stakeholders, orderly cessation of services and managing customer inquiries and concerns throughout the shutdown process.

Final Reporting: Upon completion of the shutdown activities, the Implementer will prepare a final report detailing the execution of the Shutdown Plan, including any challenges encountered and how they were addressed. This report will be submitted to SDG&E for review and record-keeping.

1.2 Training Partner Manual

Thank you, Training Partners, for working with us on the LEARN program!
Here are our guidelines for the amazing work you will do.
Please let us know if you have any questions.

WHAT'S INSIDE

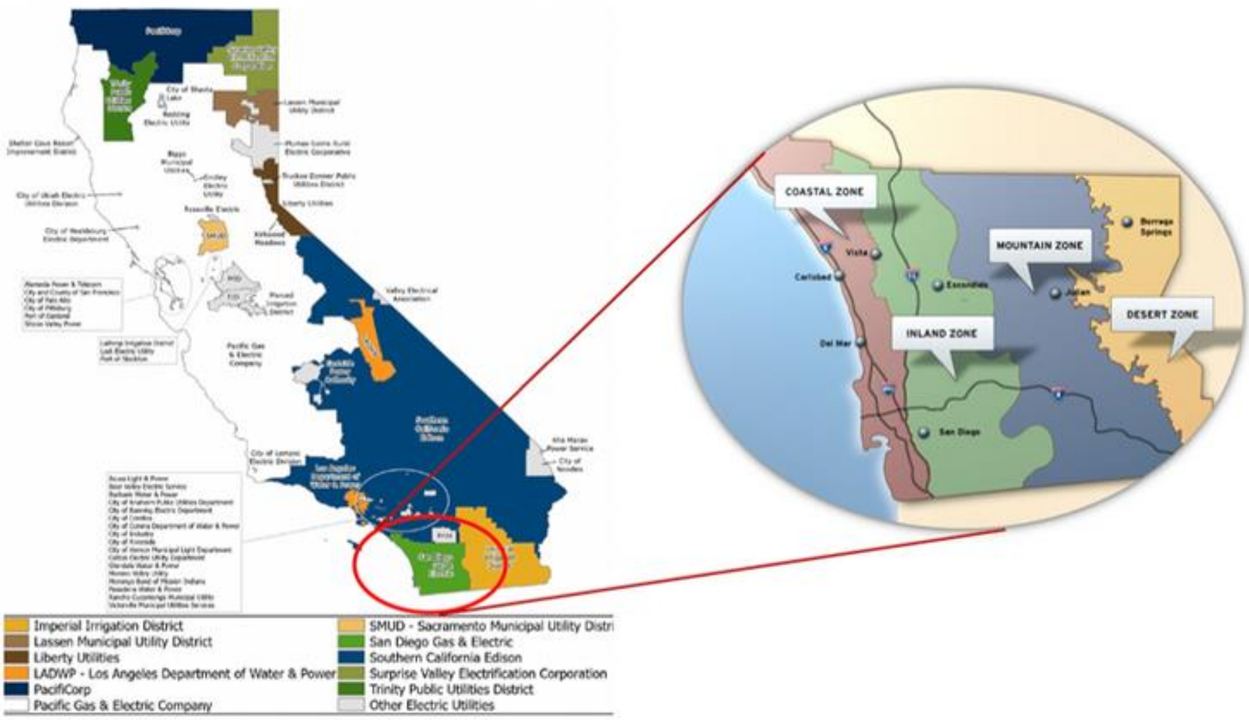
Contacts

Welcome to San Diego LEARN

A little about the utility program we are creating content for SDG&E:

- Distributes energy service to 3.7 million people through 1.49 million electric meters and 905,000 natural gas meters in San Diego and southern Orange counties.
- Supplies power to a population of 1.4 million business and residential accounts in a 4,100 square-mile service area spanning 2 counties and 25 communities.

Areas Served by SDG&E:



1. **SDG&E Review and Approval**

All curricula outlines must be sent to LEARN for SDG&E approval before content is developed or delivered. Once a course is ready to be delivered, additional content may be requested for review.

2. **Development of Training Materials**

A. New Webinars

Before you develop new materials for us, we'll meet to determine the topic, webinar audience and level (beginner, intermediate, advanced). Then you'll create learning objectives and use Course Outline. Send it to us for SDG&E approval. Once we have approval, we'll send you any relevant SDG&E slide content to include at the end of the webinar (available incentives, contact info) and you can start development.

You probably know this but . . .

When you're developing the content, think about how you will engage the participants. How about including surveys, white boards or breakout rooms?

Make sure your slides are engaging. Ask us for help if you're stuck. Don't put bullet points and text all over the slide. Use graphics, charts, and great images instead. You can put all the information into the slide notes, and when we send out the PowerPoint after the webinar, people will have your wonderful brain dump that way.

Check out the Accessibility Guidelines for Webinars. Please follow them or let the LEARN Director know if any cause problems for you. And all content must align with industry guidelines and standards.

We have to submit your materials to SDG&E for approval before you deliver the webinar. We'll give you clear timelines for each project.

B. Existing Webinars

If you are delivering a webinar that you have previously created, the first step is to send us the completed Course Outline for approval by SDG&E. All content must align with industry guidelines and standards.

Once the webinar has been approved, we'll send you any relevant SDG&E slide content to include at the end of the webinar (available incentives, contact info).

Please check out Accessibility Guidelines for Webinars. Let us know if you have any questions about them.

C. New Online E-Learning Content

Before you develop new materials, we'll meet with you to determine the topic, webinar audience and level (beginner, intermediate, advanced). Then you'll create learning objectives and use Course

Outline. Send it to us for SDG&E approval.

You probably know this but . . .

When you're developing the content, think about how you will engage the participants. How about including simulations or pop-up quizzes to reinforce content?

Make sure your content is engaging. Ask us for help if you're stuck. Use graphics, charts, and great images. Videos should be 3-5 minutes at most.

Check out E-Learning Course Development Guidelines and Accessibility Guidelines for Webinars. Please follow them or let the LEARN Director know if any cause problems for you. And all content must align with industry guidelines and standards.

LEARN staff and SDG&E will review and approve all content before it is marked complete.

3. Training Delivery Formats

A. Live Webinars

We'll work with you to schedule live webinars at a time and date that works for everyone. Our marketing team will create outreach materials which you are welcome to use (although not required). The LEARN team will do email, social media and print outreach to let participants know about the webinar. You're encouraged to do your own outreach to your network.

We use the LEARN LMS, (Docebo) for registration. You may also sign participants up through your platform. If so, please gather the participant zip code if possible.

Technical logistics, requirements, set up procedures and hosting requirements will be managed by the LEARN Coordinator and the Webinar Host. Please see:
Accessibility Guidelines for Webinars
Technical Logistics and Webinar Hosting
Safety Policies and Procedures In Webinars
Trainer Report Out

After the webinar, all participants will be sent Course Evaluation (digitally) and any webinar resources and materials.

If webinars are repeated, we ask that at least annually you review and update them as necessary.

B. E-Learning

We're using the Docebo LMS, so all E-learning content we license must be compatible, although it's such a major platform that most content will work. Let us know if you think your content might not work, or that it won't be mobile friendly.

We ask that E-Learning content follows Accessibility Guidelines for Webinars.

E-learning may be hosted on your LMS if it can be accessed through the LEARN Docebo LMS with API integration. If so, we ask for you to provide Course Evaluation (we will send a digital version as a link) in your LMS on course completion if feasible.

We will annually review courses and let you know if we think they need updating.

C. In-Person Courses

In-person courses will be organized to comply with the following:
Accessibility Guidelines for In Person Courses
In-Person Course Coordinator Guidelines
In-Person Course Facility Attestation
Safety Statements and Attestation Page 1
Trainer Report Out

Participants will fill out Course Evaluation at the end of the course.

4. Accessibility and Diversity

We have developed accessibility guidelines for Training Partners to follow.

Accessibility Guidelines for Webinars
Accessibility Guidelines for Webinars
Accessibility Guidelines for In Person Courses

Please send us a document asking for a variance if any of these guidelines can't be followed.

Additionally, the LEARN program is committed to ensuring that content created for the program reflects the diversity of the San Diego population, including webinar presenters and content imagery. Please think about this as you develop or deliver content for us.

5. Continuing Education Units (CEUs)

If LEARN courses qualify for industry CEUs please note this in the course outline. It will be the responsibility of the participant to request or download the relevant Course Completion Certificate or other documentation and apply for the applicable CEUs from the accrediting body.

6. Curriculum Evaluation and Updating

All courses will have an evaluation survey for customer satisfaction, Course Evaluation. This will be emailed to participants after webinars and included in all online E-Learning and in-person courses. Based on feedback, changes to curriculum may be requested.

7. Trainer and Participant General Policies

Please see Trainer and Participant General Policies

.

8. Resumes and Qualifications

All curriculum developers, Subject Matter Experts and Trainers must have relevant industry experience and resumes will be kept on file by LEARN. SMEs and Trainers are expected to hold any relevant safety certifications for courses they develop or teach.

9. Safety and Compliance

We ask that webinar hosts read the LEARN webinar safety statement Safety Statements and Attestation Page 1 at the start of the webinar, comply with LEARN safety policies and Safety Policies and Procedures In Webinars.

In-person instructors will read the LEARN workshop safety statement in Safety Statements and Attestation Page 1 and each participant will sign the safety acknowledgement. All training materials will comply with relevant industry safety standards.

ATTACHMENTS	PAGE

Page 1

1.2.1. Course Outline

Course Title:	
Estimated Time	
Prerequisites	
Audience	Select One:
Level: Select all that apply	☐ Beginner ☐ Intermediate ☐ Advanced
Course Description	
Learning Objectives	
Type of Course Content	Select One:
Technology Requirements	
Continuing Education Units	
Subject Matter Expert Name and Short Bio	
Any additional information that you would like us to know?	

1.2.2. Accessibility Guidelines for Webinars

A. Pre-Webinar Accessibility Planning

Ensure the registration process is accessible, with forms that are screen-reader friendly and can be navigated using a keyboard. Ensure accessibility features (subtitles, etc.) that are available during the webinar are advertised in pre-webinar communications.

B. Platform Selection

Choose a webinar platform that supports accessibility features, including closed captioning and keyboard navigation. Conduct accessibility testing on the platform to identify and address potential barriers.

C. Content Preparation

Use high-contrast colors for slides and visual aids. Provide alternative text for images and ensure all information conveyed visually is also available in spoken form. Use large, legible fonts and clear headings for structure. Use descriptive titles for each slide to help participants follow along.

D. During the Webinar

Ensure clear audio quality. Consider using a high-quality microphone and a quiet environment to reduce background noise. Use real-time closed captioning. This can be done through the webinar platform itself or by using a third-party service. Verbally describe the content of slides, videos, and any visual materials for participants who cannot see them. Offer various ways for participants to ask questions or provide feedback, such as through chat, Q&A features, or voice.

E. Interaction and Engagement

Ensure the Q&A sessions are accessible. Repeat questions asked aloud before answering them and make sure written questions in chat are read aloud. Check that any polls or surveys are accessible to screen readers and keyboard users.

F. Post-Webinar Accessibility

Provide an accessible recording of the webinar, including captions and a transcript, to registered participants. Ensure that any supplementary materials shared after the webinar, like slides or handouts, are in accessible formats.

G. Technical Support

Offer support for participants who may need assistance with accessibility features.

H. Feedback and Improvement

After the webinar, solicit feedback specifically on accessibility to understand what worked well and what could be improved.

1.2.3. Accessibility Guidelines for E-Learning

This document outlines the accessibility policies and procedures to ensure that self- paced e-learning courses hosted on the LEARN Docebo LMS are accessible to all learners.

A. Content Accessibility

Use legible fonts and appropriate sizes.
Ensure high contrast between text and background.
Text should be resizable and compatible with screen magnifiers.
Provide descriptive alt text for all images, charts, and graphs.
Ensure that information conveyed through images is also available in text format.
Provide accurate closed captions for videos.
Include transcripts for all audio content.
Ensure that video and audio content does not auto-play and can be paused, stopped, and controlled by the user.
Provide Spanish language versions of classes wherever possible, using AI video translations or transcriptions.

B. Navigational and Structural Accessibility

Organize content in a logical order.
Use consistent navigation and interface elements throughout the course.
Ensure that all interactive elements are navigable and operable with a keyboard.
Ensure compatibility with popular screen readers.
Use proper HTML markup to structure content (e.g., headings, lists, links).
Ensure that all forms are labeled properly and can be completed using assistive technologies.

C. Testing and Compatibility

Test course content on various devices and browsers for accessibility.
Include testing on mobile devices to ensure accessibility.

D. Support and Resources

See <u>Contacts</u> page for accessibility queries and help.
Guidance materials or tutorials on how to use accessibility features will be included within the LEARN Docebo LMS.

E. Feedback and Continuous Improvement

Feedback survey forms will be included in the LEARN LMS specifically regarding accessibility.
Courses will be updated as needed to address issues and incorporate any new standards.

1.2.4 Accessibility Guidelines for In Person Courses

These guidelines are designed to ensure that all aspects of in-person workshops are accessible to a diverse range of participants, including those with various disabilities.

A. Venue Accessibility

Ensure the venue is wheelchair accessible, including entrances, exits, and restrooms.

Provide designated, accessible parking spaces close to the venue entrance.

Arrange seating to accommodate wheelchairs and provide various seating options.

B. Pre-Workshop Communication

Provide a way for participants to request specific accommodations in advance.

C. Presentation and Materials

Offer workshop materials in large print upon request.

Use high-contrast colors and large fonts in presentations and handouts.

Ensure any videos shown are captioned and described.

Include Spanish translated content if available.

D. Assistive Technologies and Services

Provide assistive listening devices or sign language interpreters as requested.

E. Interactive Components

Design workshop activities that provide alternative ways to participate.

Encourage diverse group formation and ensure that every member can contribute.

F. Breaks and Physical Comfort

Schedule regular breaks to accommodate rest and medication schedules.

Offer a quiet room or space for participants who might need a break from sensory stimulation.

G. Emergency Procedures

Ensure that emergency exits are accessible.

Brief participants on emergency procedures, including accommodations for those with disabilities.

H. Feedback and Continuous Improvement

Include questions about the accessibility of the workshop in the feedback survey.

Assess and improve accessibility features based on participant feedback.

I. Staff Training and Compliance

Provide training for on disability awareness and how to assist participants with diverse needs.

Ensure compliance with accessibility laws and standards.

1.2.5. E-Learning Course Development Guidelines

Here are guidelines to help with your E-Learning course development.

A. Course Initialization

Course Name

Level (e.g., beginner, intermediate, advanced)

Target Audience

B. Course Goal & Learning Objectives Formation

Discuss and brainstorm the overarching course goal

Develop terminal learning objectives (TLOs) for the entire course (Goal and LO template)

Circulate the course goal and TLOs amongst the broader team as required for feedback and validation

C. Sub- or Supporting-Learning Objectives (SLOs)

For each main learning objective, outline specific supporting learning objectives (SLOs)

D. Engagement Strategy and Available Assets

Outline engagement strategy

Document available assets

E. Content Creation First Draft

Draft content

Ensure content aligns with the TLO and SLOs

F. Content Revision & Enhancement

Review the first draft

Ensure alignment with learning objectives

Enhance the content by adding details or clarifications

(Iterative process of creation and review until final draft agreed on)

G. Final Quality Review

Review content for flow, accuracy, engagement and alignment

Ensure content meets accessibility guidelines

1.2.6. Technical Logistics and Webinar Hosting

This document provides detailed guidelines for the LEARN Coordinator and Webinar Host on the technical logistics, requirements, setup procedures, and hosting requirements for webinars within the Program.

A. Technical Requirements and Setup

The Webinar Host is responsible for a computer and internet connection that will allow for seamless delivery of the webinar, including those of any guests.

The Webinar Host will notify the LEARN program if they intend to use a platform other than Microsoft Teams or Zoom.

The Webinar Host will test internet connectivity, audio, video, and webinar software functionality before the webinar.

It is the Webinar Host's responsibility to set up a physical presentation environment with adequate sound and lighting, and free from background noise and distractions.

B. Webinar Hosting and Management

Role of the LEARN Coordinator

Oversee webinar scheduling, marketing and participant invitations.

Coordinate with speakers and hosts.

Manage webinar registration and attendance tracking.

Role of the Webinar Host

Initiate and close the webinar sessions.

Manage participant interaction, including Q&A sessions, polls, and chat moderation.

Ensure webinar runs smoothly and according to the agenda.

Include, where possible, webinar transcription services for accessibility.

Record the session as requested and if part of the agreement.

C. Post-Webinar Procedures

The LEARN Coordinator or Webinar Host will distribute evaluations and any additional resources to participants by email.

The LEARN Coordinator will upload the recorded webinar to the LMS.

The Webinar Host will provide LEARN with a detailed report on participant numbers and any feedback received during the webinar.

D. Emergency Protocols

In the event of an emergency or other unforeseen issue, the webinar will be rescheduled, and all participants notified.

E. Contact for Technical Support

See page 24: Contacts.

1.2.7. Course Evaluation

Course Title: **Course Date:**

Please help us improve this course by responding to the following statements and questions.

Please rate the overall quality of the course:
Very Poor Poor Fair Good Very Good

Please rate the instructor's knowledge and effectiveness in delivering the material:
Very Poor Poor Fair Good Very Good N/A

How well did the course content align with the course description in terms of relevance and appropriateness?
Very Poor Poor Fair Good Very Good

Rate your knowledge gain of the subject as a result of taking this course:
Very Poor Poor Fair Good Very Good

The course helped me understand a technology or rebate / incentive program better so that I could participate in an SDG&E Rebate / Incentive
Yes No Unsure

If you requested accessibility accommodations, how well were they provided?
Very badly Badly Fair Well Very Well Not Applicable

How did you hear about this course?
Email from the LEARN program
SDG&E website
LEARN website
Internet search
Professional / Trade / Community Organization
Colleague / Friend Social Media
SDG&E Flier
Other

What suggestions do you have for improving this course?

Are there any other energy efficiency topics you would like us to offer?

Other comments? Please contact us at: sdlearn@rhainc.com / 619-500-9334

1.2.8. In-Person Course Coordinator Guidelines

A. Prep Before the Course

- Participant-Trainer Ratio: Consider the ratio that is suitable for the course.
- Facility Attestation: Customize and send out the checklist for facility requirements.
- Review form upon return.
- Course Materials / Resources: Confirm trainer and participant materials with the trainer.
- Accommodation Requests: Arrange any participant requests and notify the trainer.
- Technology: Verify that all technology needed for the course is functional.
- Course Trainer Folder: Send the trainer the course roster, safety statement forms, participant evaluations, trainer log, and report.

B. The Course

- Safety and Facility Check: The trainer uses the facility checklist to confirm that facilities and any tools and equipment meet the safety requirements and needs for the course.
- Safety Statement and Participant Safety Attestation: The trainer informs participants of all safety protocols. Participants to complete safety attestation.
- General Policies and Procedures: The trainer directs participants to the LEARN website for information.
- Roster Verification: The trainer verifies the attendance of participants in the course.
- Participant Evaluation: The trainer directs participants to complete course evaluations.
- Trainer Report: The trainer completes their report at the end of the course.

C. Afterwards

- Digital Certificate: Send digital certificates to participants as appropriate.
- Participant Evaluation Review: Review and act on feedback from participant evaluations.
- Trainer Report Review: Review and act on feedback from the trainer report.

1.2.9. In-Person Course Facility Attestation

Name of Course: **Course Date:**

Facility Name and Location:

Contact Person: **Contact Number:**

Training Room:
The room / lab for in-person training must have adequate lighting, heating/cooling, and space; a safe work environment, comfortable seating, access to drinking water and bathroom facilities, handicap accessibility (if needed), and presentation equipment in good working order – a projector and screen.

Props, Tools, and Equipment:
For this course, we require the following props, tools, and equipment in safe working condition: (attach list, with amounts and quantities per participant).

Materials:
For this course we require the following materials: (attach list)

Safety:
For this course, we require the following safety equipment and PPE: (attach list).

Field Training:
For this course, we need the following field training location: (attach list):

Check where applicable

- ☐ **I have read and understand the requirements for training at my location.**
- ☐ **I have the required training room space.**
- ☐ **I have the required props, tools, equipment, and materials available.**
- ☐ **All tools and equipment are in safe working condition.**
- ☐ **I have the required personal protective equipment for each participant.**
- ☐ **I have the required field training location for the course.**

Name:

Signed: **Date:**

1.2.10. Safety Statements and Attestation Page 1

Webinar Safety Statement

Webinar host to read the following statement to participants:

Welcome everyone to our online webinar. Before we dive into today's session, I'd like to share a few important safety and comfort guidelines:

It's important to take care of your physical well-being while attending this webinar. I encourage you all to take short breaks to stand up, stretch, and move around a bit.
If at any point during our discussion you feel uncomfortable or have concerns about the material being presented, please don't hesitate to send me a private message in the chat. Your comfort and well-being are paramount, and I'm here to support you.
We encourage a respectful and inclusive environment for all participants.
If you encounter any technical difficulties, such as trouble with audio or video, please let me know immediately through the chat function. We want to make sure everyone can participate fully.

In case of an emergency, please take the necessary steps to ensure your safety first. If possible, let us know about your situation through the chat or email.

1.2.10. Safety Statements and Attestation Page 2

In-Person Course Safety Statement

Trainer to read the following statement to participants. Omit parts that are not relevant to the course.

To ensure your safety please take a moment to listen to the following safety procedures. Cooperating is essential to creating a secure and conducive learning environment for everyone.

Equipment Safety Procedures:
Please perform a pre-use check to ensure equipment is in good working condition before using any equipment. Notify me of any concerns.
Use each piece of equipment correctly. Ask me if unsure.
Follow all PPE procedures I outline. For this class we will be using . . . (list required PPE).

Health and Safety Procedures:
Familiarize yourself with the emergency exits, fire extinguishers, and first-aid kit locations.
(point them out to participants)
Immediately report accidents or near-misses to me.
Prevent any health hazards by maintaining personal hygiene and keeping the workspace clean.

Remember, safety is a collective responsibility. Take responsibility for your safety and the safety of those around you.

1.2.10. Safety Statements and Attestation Page 3

In-Person Course Safety Participant Attestation

By signing this form, I certify the safety policies and procedures of the LEARN Program have been explained to me.

I understand that in violation of any safety rules or regulations, I may be removed from a task or the entire course.

I further understand that any safety infractions (including refusal to wear appropriate clothing or to wear personal protective equipment, when provided) may cause me to be removed from a task or the entire course.

Course:

Name:

Date:
Signature:

1.2.11. Safety Policies and Procedures In Webinars

Our goal is to ensure that all our webinars are safe, inclusive, and respectful spaces for learning and interaction. To achieve this, we adhere to the following policies:

Trainers

To ensure our webinars are effective, secure, and respectful, we ask trainers to follow these key policies:

- Use only trusted online platforms with strong encryption.
- Respect everyone's privacy. Do not share personal details or record sessions without permission.
- Have a moderator or host supervise each session to prevent inappropriate behavior.
- Set clear rules for chat use to keep discussions respectful and on-topic.
- Limit file sharing to avoid harmful content. Only let authorized people share documents or resources.
- Begin each webinar with a safety briefing. Read the LEARN Safety Statement and explain what to do if there are technical problems or other emergencies.
- Keep the webinar platform and any related software updated for optimal security and performance.
- Follow data protection laws and tell participants how their information is used and stored.

Participants

- All participants must communicate respectfully with each other. Harassment, offensive language, and disruptive behavior are not tolerated.
- Personal information shared in webinars, whether by the hosts or participants, should be treated as confidential. Recording or sharing webinar content without permission is prohibited.
- We use secure platforms for our webinars to protect your information. Participants should also ensure their own data security by using secure internet connections and protecting personal login credentials.
- Our webinars are moderated to maintain a productive and safe environment. Moderators have the authority to mute, remove, or ban participants who violate the rules.
- Participants are encouraged to report any concerns or violations of these policies to the webinar hosts or program administrators immediately.

1.2.12. Trainer Report Out

Course Title: **Date:**

Trainer Name:

#Participants: _________ At the end of each course, complete the following Trainer's report out.

Issues:

Comments:

Software Problems:

Attendance Problems:

Equipment/Site Issues:

Content: Any material not covered: Give specific details and reason why this portion of the training was omitted

Other Comments: Overall assessment of the course and any suggestions to make it better.

1.2.13. General Policies and Procedures for Trainers and Participants Page 1

This document provides general and safety policies and procedures for trainers and participants in the LEARN program.

Non-discrimination

Our training program is committed to providing an inclusive and welcoming environment for all participants, regardless of their race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status. We do not tolerate discrimination or harassment of any kind. All participants are expected to uphold this standard of equality and respect.

Conflicts of Interest

Trainers are expected to maintain the highest standards of integrity and professionalism. This means avoiding any situation where personal interests could conflict, or appear to conflict, with the interests of the training program or its participants.

Trainers must disclose any relationships, associations, or activities that might influence, or appear to influence, their judgment or actions in their role as a trainer.Trainers should not use their position to benefit personally or to favor family members, friends, or associates.

Keep personal interests separate from professional responsibilities. Do not engage in any business, relationship, or activity that might impair impartiality or affect the ability to perform duties objectively.

If uncertain whether a situation constitutes a conflict of interest, report it to the program administration for guidance. All reported conflicts will be reviewed, and appropriate actions will be taken to resolve them.

Confidentiality

As a participant, trainer, or staff member in our training program, you may have access to confidential information. This includes personal data of participants, training materials, and internal communications. We expect you to always respect the privacy and confidentiality of this information.

Do not disclose or share any confidential information with anyone outside the program unless you have explicit permission to do so.

Use confidential information only for the purpose of the training program and not for any personal gain or in a manner that could be detrimental to individuals or the program. If you believe confidential information has been compromised, report it immediately to the program administrators.

1.2.13. General Policies and Procedures for Trainers and Participants Page 2

Release of Information

We respect the privacy and confidentiality of all participants. Personal information, including but not limited to, contact details, performance data, and other sensitive information, is protected and will not be shared externally without explicit consent. Personal information will only be released to third parties when we have received clear, written consent from the individual concerned, specifying the information to be shared and the recipient.

In certain circumstances, we may be required to release information as per legal obligations. In such cases, only the necessary information will be disclosed, and the affected individual will be informed, unless prohibited by law.

Information may be shared internally within the program for operational purposes, but all staff and trainers are bound by this confidentiality obligation.

Conflicts, Disputes, Resolution, and Appeals

We are committed to providing a fair and supportive environment for all participants. We recognize that conflicts and disputes may arise and are dedicated to resolving these matters through a transparent and equitable process.

Participants are encouraged to report any conflicts or disputes to the program administrators as soon as possible.

We will address all reported conflicts and disputes promptly and fairly. This process may involve discussions with the parties involved and an investigation to gather all relevant information. After reviewing the situation, a decision will be made by the program administrators or a designated committee. This decision aims to be just and in the best interest of all parties involved.

If any party involved in the conflict or dispute is dissatisfied with the decision, they have the right to appeal. The appeal must be submitted in writing within a specified time frame after the decision. The appeal will be reviewed by a separate, impartial committee, which will make the final determination.

Accommodations

We are committed to ensuring accessibility and equal opportunities for all participants. If you require any specific accommodations to effectively participate in the program due to a disability or other needs, please contact us at least 14 days prior to the start of the program. We will work with you to provide reasonable accommodations and support to ensure your full participation and success in our training.

Contacts

LEARN Program Manager: Amanda Hatherly, *ahatherly@rhainc.com,* 505-690-2603

LEARN Operations Manager: Jackie Kembi, *jkembi@rhainc.com*

LEARN Marketing and Outreach Manager: Jasmeet Singh, *jsingh@rhainc.com*

LEARN Program Administrator: Crystal Dyer, *cdyer@rhainc.com*, 559-214-2505 LEARN

Customer Feedback: *sdlearn@rhainc.com,* 619-500-9334

Attachment 2: Program Theory and Logic Model

2.1. Program Theory

1. **Introduction**

The program is designed to enhance workforce education and training in the energy efficiency and electrification sectors, offering a comprehensive suite of initiatives aimed at various customer segments, including trades professionals, homeowners and educational organizations. The program theory explains the causal relationships between diverse program activities and the overarching goals, delineating how these efforts collectively address barriers to accomplish enhanced career opportunities and industry-wide advancement.

2. **Program Goals**

Broaden access to energy efficiency education and training: Provide accessible, engaging and contemporary training content free of charge to all customer segments to elevate their knowledge and skills in energy efficiency and electrification.

Facilitate DAW certification: Support existing organizations working with DAWs to offer no-cost certifications,, improving their access to career opportunities in the energy efficiency sector.

Strengthen collaborations with educational organizations: Partner with educational institutions to enrich existing curricula and offer needed educational resources.

Partner with CBOs: Partner with CBOs to extend outreach to underserved communities.

Partner with industry: Create partnerships within the industry to leverage and distribute training opportunities.

3. **Program Activities**

Offer comprehensive training and certification opportunities: Deliver a wide range of energy efficiency and electrification content through no-cost webinars, online courses and other training formats, alongside access to nationally recognized certifications for DAWs.

Engage in strategic partnerships: Collaborate with workforce training programs, educational institutions, industry partners and CBOs to promote and market courses and enrich academic offerings.

Provide support and resources: Forge ongoing relationships with community colleges, vocational schools, trade associations, and other educational organizations to supply ongoing training opportunities, textbooks, demonstration units and other essential resources.

Offer user-friendly online platforms and resources: Provide tutorials, FAQs and technical support to help participants navigate technology barriers effectively. Provide mobile-friendly options. Provide courses and materials in English and Spanish.

4. Expected Causal Relationships

By offering no-cost, engaging training content, the program directly addresses the knowledge gap in energy efficiency and electrification, expected to lead to a more informed and skilled workforce and customer base.

The specific focus on providing DAWs with no-cost certifications and targeted training addresses financial and informational barriers, thereby enhancing their employability and career advancement opportunities in the energy efficiency sector.

Collaborations with educational institutions, industry partners, and CBOs are designed to enrich educational content and extend the program's reach to underserved communities. These partnerships facilitate the integration of energy efficiency topics into broader curricula, ensure that training opportunities and materials are shared across the industry and ensure that information about career opportunities and training reaches those most in need, overcoming both educational and community-based barriers.

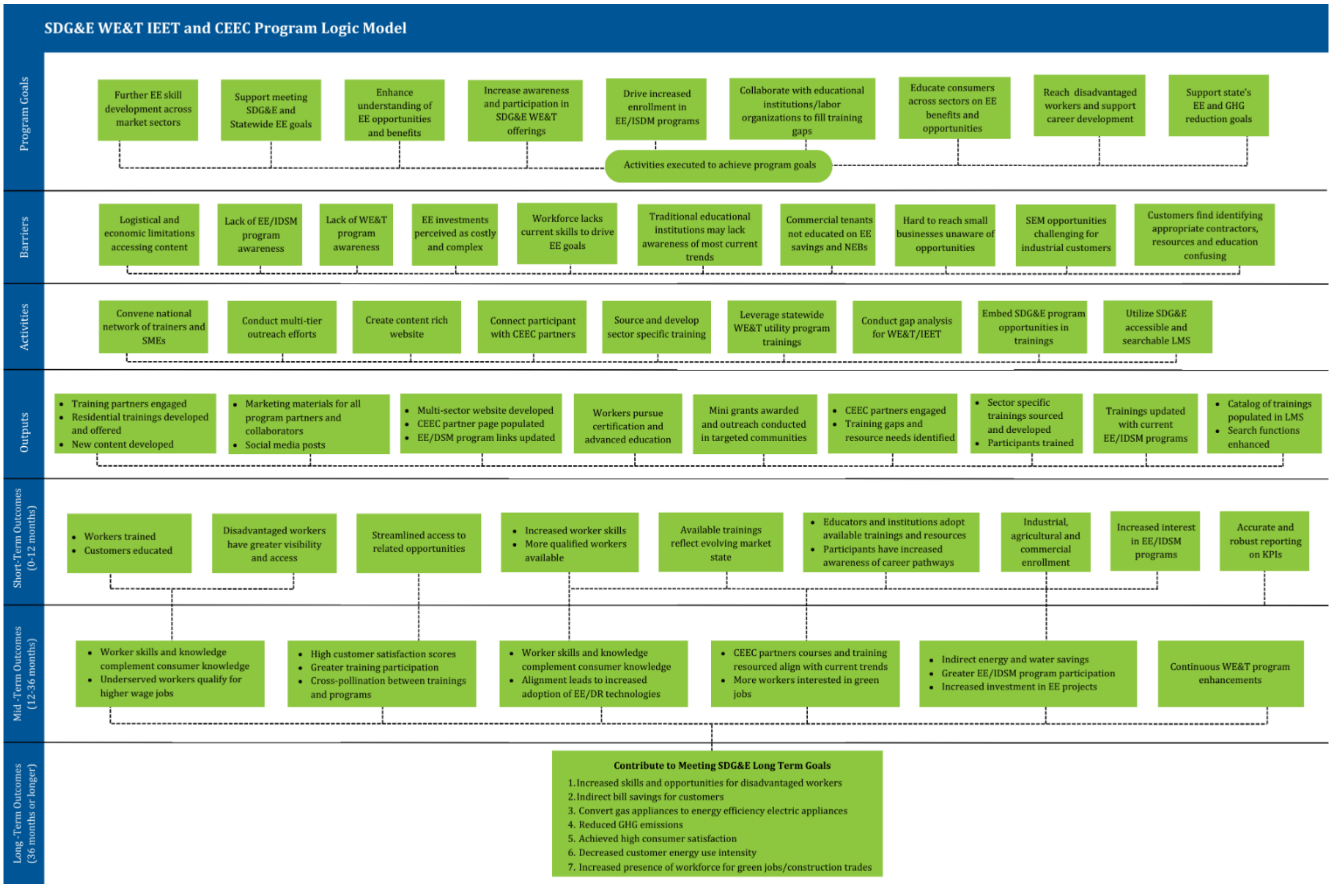
5. Overcoming Barriers to Accomplish Goals

The program theory identifies multiple barriers, including financial constraints, lack of awareness, technology, educational and language gaps as systemic barriers to employment in the energy efficiency sector. The program is designed to systematically address and overcome these barriers through its comprehensive activities — ranging from no-cost training for all and no-cost certification for DAWs to strategic collaborations with educational, industry and community organizations. This integrated approach ensures that all participants have enhanced access to education, training and career opportunities, contributing to the sector's overall growth and sustainability (see **Error! Reference source not found.**

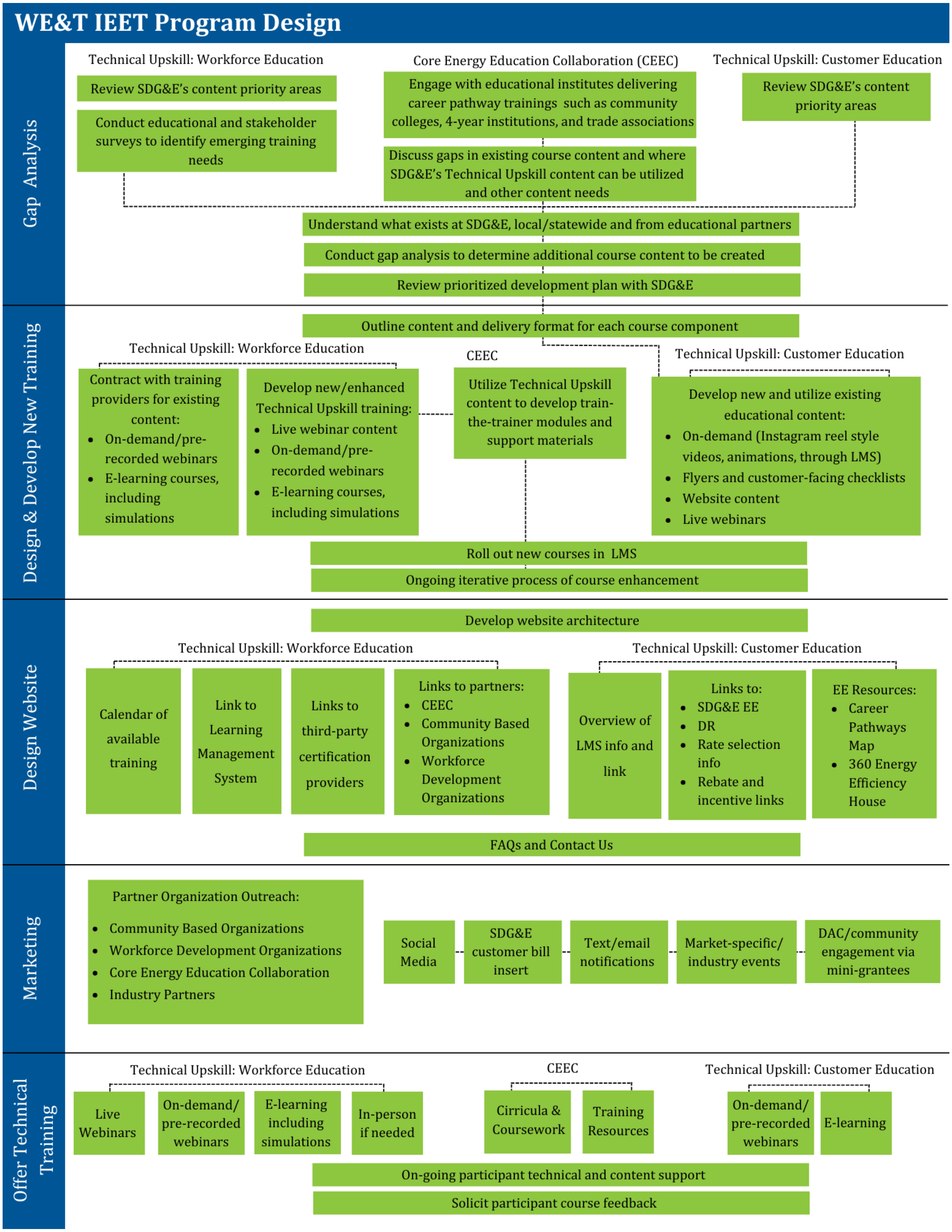
6. Conclusion

This program theory outlines a strategic framework to transform the energy efficiency workforce through education, training and partnership initiatives. By clarifying the causal pathways from program activities to intended outcomes, it demonstrates a holistic approach to overcoming barriers and achieving significant, sustainable impacts across diverse participant segments.

2.2. Logic Model



Attachment 3: Process Flow Chart

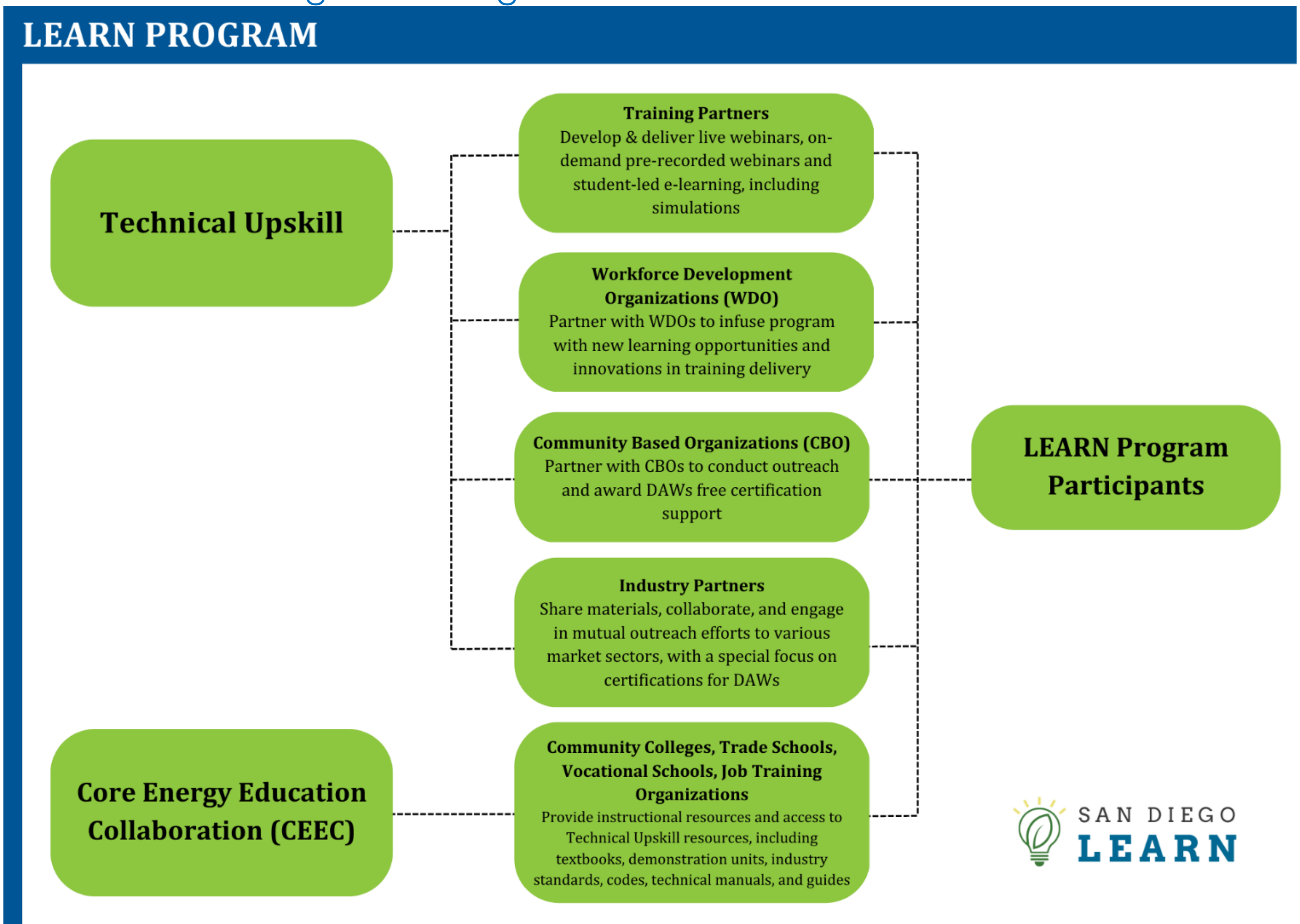


Attachment 5: Quantitative Program Targets

Table 6 : Attachment 5 Quantitative Program Targets

Category	Description	Program Goal
Program Performance: Expanding WE&T reach via collaborations	Number of collaborations, with contextual descriptions, by business plan sector to jointly develop or share training materials or resources	6
Program Performance: Program / reach of training	Number of participants by sector	7,000
Program Performance: Program / reach of training	Percentage of unique participants relative to eligible target population	9%
Disadvantaged Worker	Percent of participants who meet the definition of DAW	51%

Attachment 6: Diagram of Program



Attachment 7: Evaluation, Measurement and Verification (EM&V)

1. Introduction

The LEARN program has implemented a measurement and verification (M&V) plan that track, reports and analyzes key performance metrics as detailed below to ensure proposed metrics and outcomes prove both accurate and actionable as a part of Evaluation, Measurement and Verification (EM&V) Impact Evaluations (and CPUC project or program-level dispositions). Tracking and evaluation metrics include:

- Number of attendees/participants by residential sector that attend trainings
- Number of attendees/participants by non-residential sector that attend trainings
- Percentage of Technical Upskill participants from each market sector
- Percentage of participants relative to eligible target population for curriculum
- Percentage of total WE&T IEET training program participants who meet the definition of disadvantaged worker based on Cal-Enviroscreen 4.0
- Number of collaborations with training partners by industry sector
- Course feedback survey scores
- Number of collaborations with CEEC partners
- Website views
- Average website session duration
- Click-throughs to partner websites
- Percentage of trainings delivered by market sector
- Number of enhanced course content and other support activities delivered to CEEC collaborators
- Invoicing and billing accuracy

These metrics are tracked in the following way:

Table 7: Metrics Tracked and Data Source

Tracked Items	Evaluation Data Gathered From
Number of attendees/participants by residential sector that attend trainings	Data pulled from LMS, collected when participant registers
Number of attendees/participants by non-residential sector that attend trainings	Data pulled from LMS, collected when participant registers

Percentage of Technical Upskill participants from each market sector	Data pulled from LMS, collected when participant registers
Percentage of participants relative to eligible target population for curriculum	Data pulled from LMS, collected when participant registers
Percentage of total WE&T IEET training program participants who meet the definition of disadvantaged worker based on Cal-Enviroscreen 4.0	Data pulled from LMS, collected when participant registers
Number of collaborations with training partners by industry sector	Documentation of activities with training partners, stored in RHA database
Course feedback survey scores	Data pulled from LMS
Number of collaborations with CEEC partners	Collaboration agreements stored in RHA database
Website views	Website analytics, stored in RHA database
Click-throughs to partner websites	Website analytics, stored in RHA database
Percentage of trainings delivered by market sector	Data pulled from LMS
Number of enhanced course content and other support activities delivered to CEEC collaborators	Activity and resource delivery logs stored in RHA database
Invoicing and billing accuracy	All information stored and pulled from RHA database

Tracking these metrics provides LEARN with a clear picture of program outputs and measurable results to compare against intended outcomes and provide a framework for continuous improvement throughout the program cycle. Outcomes are categorized into near, mid and long-term results and outlined below.

Relevant KPIs for this program design and the reporting requirements of these indicators are detailed in **Error! Reference source not found.**

2. **Near-Term Outcomes**

- Increased training participation
- Increased adoption of training materials by CEEC partner organizations
- Increased worker knowledge, skills and use of fundamental concepts, practices, careers and utility-sponsored programs
- Increased CEEC student competencies to engage with new technology in the workplace
- Increased awareness of career pathways for Technical Upskill and CEEC participants

- Increased customer knowledge of energy efficiency value, new technologies, demand response, utility programs, etc.
- Indirect energy savings
- Increased awareness and familiarity with tools, equipment and energy management systems and controls

3. **Mid-term Outcomes**

- Increased penetration of training materials into CEEC educational organizations
- Increase in people pursuing jobs in energy efficiency industry
- Increased participation of disadvantaged workers in certification programs
- Increased use of fundamental concepts, emerging technologies, best workplace practices, careers and utility programs
- CEEC students move into new opportunities, leading to increased employment options, higher salaries and higher quality work
- Increased adoption and market acceptance of new technology
- Indirect energy savings

4. **Long-term Outcomes**

- Energy efficiency educational opportunities accessible and utilized
- Increased presence in market of skilled workers in green jobs, including disadvantaged workers
- Increase in customers pursuing efficiency projects, and well-trained contractors have integrated new technologies into their offerings
- Reduced GHG emissions through electrification
- Indirect energy savings and customer energy use intensity
- High customer satisfaction scores

5. **Data Collection and Analysis**

The data collection strategies used by the LEARN program:

- **Using varying systems to collect data:** The LEARN program collects all data fields necessary to track the above metrics.
- **LMS:** As LEARN participants register for training, both mandatory and optional data fields are collected to track metrics.
- **RHA Industry:** The LEARN program uses a relational database to manage data. This database tracks data related to metrics and KPIs, certification scholarships, the mini

grantee program, CEEC partner engagement and other efforts. The database allows LEARN to produce KPI reports for regular internal review and continuous improvement. The database enables efficient program management, partner engagement and other important KPI tracking.

- **Producing reports:** The LEARN program generates reports from Docebo, PowerBI and the RHA Industry data management system.
- **Quality checking data:** The LEARN analyst team quality checks data to minimize duplicate data and ensure complete and uncorrupt data.
- **Producing dashboards:** LEARN uses PowerBI to produce visual dashboards to see easily where the LEARN program is meeting, exceeding or falling short of projected performance.
- **Reviewing dashboards and taking action:** The LEARN Program Operations Manager reviews dashboards and data regularly to initiate action to identify barriers to success, develop strategies for overcoming those barriers and course correct.
- **Reporting:** LEARN reports monthly, quarterly and annually to SDG&E the tracking and evaluation metrics in this document.
- **Performance Indicators:** LEARN will work with SDG&E to adjust the reporting schedule as needed.

6. Potential Data Collection Challenges, Risks and Uncertainties

The LEARN program is cognizant of the potential data collection challenges below and has tactics for addressing these challenges.

Some data fields will be optional and self-reported: LEARN has ensured clear language and other communication to registrants regarding data confidentiality.

Partners will be responsible for self-reporting activities and other data: LEARN will regularly interact with partners and follow up with those not actively reporting or otherwise unengaged. Additionally, contacts with partners will be logged in the internal database.

Participants may provide inaccurate or incomplete profile information or set up multiple accounts: LEARN uses standard account verification strategies, such as email verification, and performs cross-reference checks in the LMS to minimize duplicate accounts.

7. M&V Activities

M&V activities include but are not limited to:

- Compiling data and information
- Analyzing data and using dashboards
- Evaluating, reporting and adjusting the program for continuous improvement

8. Methodologies to Quantify and Verify Participation and Collaboration

The LEARN program uses the following methodologies to quantify and verify participation and collaboration:

- Analyzing participant registration and attendance to quantify:
- Number and percent of unique participants as provided in the 2021 Advanced Energy Economy Report
- Participants qualifying as disadvantaged workers
- Market sector attendee percentages
- Number of total participants initiating and/or logging in to courses
- Analyzing course feedback scores
- Monitoring website visits and click-throughs
- Monitoring average session duration on website
- Tracking and monitoring collaborative agreements by partners
- Tracking the number of CEEC collaboration agreements
- Tracking partner activities in the LEARN database
- Tracking contacts made with partners, including emails, texts, etc.

9. Adjustments to Deliverables

The LEARN program works SDG&E to review deliverables annually to identify whether modifications are needed.

Attachment 9: Marketing Plan

1. **Overview**

A. Introduction

This marketing plan is designed to support the overarching goals of the LEARN program through the execution of marketing strategies to ensure an effective and impactful outreach. It outlines the approach to capture market opportunities by engaging with the target audience and collaborating with industry partners for a successful launch of the program.

B. Purpose

The primary purpose of the marketing plan is to outline the strategic marketing goals and objectives into actionable steps while providing a clear direction for marketing efforts. By defining key strategies and tactics, the plan aims to enhance the LEARN program's visibility and achieve program performance goals, including the number of collaborations by business plan sector, number of participants by sector, number of unique participants by sector that complete training and the percent of participation relative to eligible target population. This marketing plan serves as a dynamic tool, guiding the team to adapt and thrive in the ever-evolving market and ensuring the LEARN program remains relevant and competitive.

Table 8: Marketing Goals and Objectives

Goals	Objectives
Prepare and Distribute Marketing Collateral	Develop comprehensive marketing collateral based on the marketing objectives. Finalize branding and positioning in collaboration with SDG&E to ensure a cohesive and compelling narrative. Ensure collateral includes both print and digital formats for effective distribution to CBOs, industry partners, training partners, workforce development organizations and the at-large community. Regularly refresh and update materials as needed to keep content current and relevant.
Develop and Implement Social Media Strategy	Establish social media accounts on relevant platforms with integrations to support an effective online presence. Create engaging assets aligned with the LEARN program brand guidelines, ensuring consistency and brand integrity. Implement a content calendar for regular posting and actively monitor metrics to assess strategy on social media platforms.
Outreach to Industry Partners	Conduct targeted outreach to industry partners, including attendance at relevant events, regular informative emails and active social media engagement. Cultivate relationships with industry stakeholders to enhance collaboration and program visibility. Ensure consistent and informative communication with partners to keep them engaged and up-to-date with the LEARN program.
Implement Overall Marketing Strategy	Conduct thorough market research to identify opportunities and challenges in the target audience and adjust strategy as needed. Set clear and measurable goals for the marketing campaign to keep track of

	progress and success. Develop and implement ongoing marketing campaigns aligned with the overall strategy, adapting based on goals and KPIs as needed.
Engage CBO Mini-Grantees for DAW Engagement	Design and implement a mini-grant program to incentivize CBO partners' engagement with the program. Collaborate with the CBOs to identify and encourage DAW candidates to participate, providing support for certification if appropriate. Foster ongoing communication and collaboration with CBOs to ensure their active involvement in identifying eligible candidates.

C. Objectives and Goals

The goal is to strategically execute a marketing strategy for the LEARN program by encompassing the development and distribution of marketing collateral, implementation of a robust social media marketing strategy, targeted outreach to industry partners, and successful engagement of CBOs to identify and involve DAW candidates for certification.

D. Target Audiences

Target Audience: Residential and commercial trade contractors and technical workers, architects and engineers, residential customers, commercial customers, agricultural market actors and customers, industrial building owners/managers, facilities staff and tenants.

Eligibility Criteria: Any customer/contractor/service provider in the SDG&E service territory may participate in the energy efficiency educational trainings offered through the LEARN program. The LEARN program allows any contractor/service provider residing outside of SDG&E's service territory to attend trainings as they may provide services to those within the SDG&E service territory. However, the primary target audience is the customer/contractor/service provider in SDG&E's service territory.

Additionally, participants will self-select the following topics of interest:

- Building Design & Construction
- Building Performance
- Energy Codes & Standards
- Foodservice
- Home Performance
- HVAC
- Commercial/Industrial (C/I) Energy Processes & Technology
- Lighting
- Marketing, Finance, and Sales

- Renewable Energy & Sustainability
- Rates, Rebate & Incentive Programs
- Zero-Net Energy
- Real Estate
- Electrification
- Decarbonization

E. Marketing Team

Table 9: Marketing Team and Roles

Role	Name
Program Manager	Amanda Hatherly
Marketing and Communications Lead	Jasmeet Singh
Marketing Designer	Jasmeet Singh
Marketing & Outreach Coordinator	Jasmeet Singh
Collateral Coordinator	Jasmeet Singh
Marketing Admin Assistant	TBD

2. Strategic Marketing and Communications

A. Strategies and Tactics

The strategies and tactics mentioned below are designed to achieve the KPIs by enhancing the LEARN program's visibility via digital and print marketing strategies, engaging the target audience and building effective partnerships within the SDG&E service territory.

i. Marketing Infrastructure Set Up

Establishing a robust marketing structure is imperative for seamless execution. Utilizing the centralized hub, known as RHA Industry, will enhance the efficient tracking and management of marketing activities. A social media management platform will be used to schedule, publish, track analytics and social listening.

ii. Print and Digital Collateral Development

Creating visually appealing collateral will help convey the value of the LEARN program to enhance the target audience's skills effectively through brochures, posters, digital assets, banners and social media content on platforms such as Instagram, Facebook and LinkedIn. These assets will showcase program highlights, key updates, participant testimonials and success stories. Key metrics include:

- **Engagement metrics:**
    - Print collateral will be tracked by the distribution and engagement of printed materials through metrics such as attendance, pick-up rates and audience interaction.
    - Digital collateral will be tracked by monitoring online engagement on social media platforms (Facebook, Instagram, LinkedIn) through likes, shares, comments and click-through rates.
- **Content reach and impressions:**
    - Print collateral will be measured by reach through engagement surveys
    - Digital collateral will be tracked by the number of impressions and reach on digital platforms to assess content visibility. Impressions are defined as the number of times the content is displayed, including multiple views from individual users. Reach is defined as the total number of individuals who view the content.
- Social media analytics:
    - See below for social media metrics.

iii. Direct Mail

A direct mail drop will be implemented to promote the LEARN program to the target audience. A physical postcard with information regarding the value of the program, a call to action and QR code will be sent to the desired audiences by targeting zip codes within the SDG&E territory. The design will be eye-catching with a clear call to action prompting recipients to the website with the QR code. Information about the desired audience will be pulled from the CalEnviroScreen Tool and postcards will to be sent within one month of the program launch. Key metrics include:

- Number of times QR code is scanned
- Number of times participants found out about the LEARN program via direct mail drop. This will be added to the participant survey to gauge response rate

iv. Social Media Strategy

Social media will be used as a platform to engage the target audience through innovative and engaging posts. The types of posts to be released include interactive polls, reels, videos, success stories, industry partner campaigns, social media challenges to win promotional items, and important highlights of the LEARN program. Key metrics include:

- **Reach:** Total number of individuals who view the content
- **Engagement rate:** Number of interactions the content receives per follower
- **Impressions:** Number of times the content is displayed, including multiple views from

individual users

- **Audience growth rate:** How many new followers your brand receives on social media within a certain period
- **Video views:** Number of individuals who viewed the respective video

v. Email Marketing Campaigns

Email campaigns, including but not limited to newsletters, updates and reminders, will provide information about new courses, upcoming live trainings and success stories and encourage previous participants to enhance their skills through other relevant trainings. The segmentation of lists will give a customized experience to the respective audience so that they can receive relevant information about the program. Key metrics include:

- **Open rates:** Percentage of subscribers who open a specific email out of the total number of subscribers
- **Click-through rates:** How many individuals clicked on a hyperlink, call to action or image within a particular email
- **Size/growth of email list:** Net increase in the number of subscribers within a given time frame relative to the initial size of the email list
- **Net subscriber growth rate:** Number of new subscribers minus the number of unsubscribes
- **Unsubscribe rate:** How many users opt out of communications

vi. Preparation and Distribution of Marketing Materials

Marketing materials will be distributed to the target audience through CBO and industry partner collaboration, relevant events and digital channels such as social media platforms, email and the program website. Materials will be refreshed periodically to reflect any program updates.

vii. Program Website

A user-friendly website will be developed to serve as the program's central information hub and an LMS will be seamlessly integrated for easy participant access. The website will also include clear navigation, engaging visuals and easy access to program resources and enrollment information. Key metrics include:

- **Website traffic:** Volume of users visiting website via direct, referrals and search sources
- **Average session duration:** Average time users spend on website during a single session
- **Site content quality:** How well content achieves its goals as well as the depth of information and insights contained within a piece of content
- **Conversion rate:** Percentage of website users that take a desired action on the site
- **First page keyword rankings:** Indicator of SEO performance in Google searches

viii. Outreach to Partners

Forming relevant partnerships with industry-specific organizations will enhance the LEARN program's credibility and increase awareness within the target audience. By collaborating with subcontractors, SMEs, training organizations, workforce development organizations, CBOs, industry partners and other market actors, the training will become accessible to diverse audiences. Collaboration with partners for joint marketing initiatives will strengthen the program's reach through informative emails, industry event participation, and active social platform engagement. Key metrics include:

- Number of partnerships
- Collaboration effectiveness
- Communication engagement
- Partnership strength
- Diversity and inclusivity

ix. Development of LMS

The LMS will include customized content for the respective target audience to ensure courses are valuable and relevant. Dynamic live webinars, on-demand pre-recorded webinars and student-led e-learning will be tailored toward each customer segment, including residential contractors, residential customers and multifamily tenants.

x. Recognition Campaigns

Campaigns will highlight the success stories of individuals and organizations who actively participated in the LEARN program. These campaigns can include participants who successfully completed courses and have utilized their skills to grow in their fields or CBO mini-grantees who are supportive industry partners.

xi. Engagement of CBO Mini-Grantees

A mini-grant program will be established to award incentives to CBOs for their involvement, including identification of DAW for no-cost certification programs. To ensure successful engagement, continuous communication and collaboration will be fostered between the LEARN Program Administrators and CBOs.

xii. Feedback Loop

Participants will provide feedback through surveys and testimonials for insight into areas of improvement for the LEARN program's marketing approach. The approach will continue to be refined as external feedback is provided from community partners and participants. Key metrics include:

- Overall course quality
- Instructor's knowledge and effectiveness in delivering the material
- How well the course content aligns with the course description in terms of relevance and appropriateness
- Rate of subject knowledge gained from course
- Suggestions for improving the course (open-ended)
- Other topics the participants would like to see offered (open-ended)
- Whether the course increased participant understanding of a technology or rebate/incentive program to encourage participation in SDG&E program
- How the participants heard about the course

xiii. Implementation of Overall Marketing Strategy

A comprehensive marketing strategy will support the LEARN program goals by conducting thorough market research to identify key trends and opportunities. Marketing strategies and campaigns will be reviewed monthly and assessed based on the performance metrics mentioned above. Collateral will reflect the various backgrounds and roles of the target audience to enhance relatability.

B. Messaging

The messaging will communicate the value of the LEARN program in enhancing skills, promoting energy efficiency and electrification, and contributing to the success of related projects through emphasizing an instructional approach, industry relevance, and the impact on participants, the community and SDG&E programs.

Additionally, the messaging will highlight the value of hiring skilled professionals, applying the acquired knowledge to their current or future roles, and actively contributing to the overall success of energy efficiency, demand response and demand-side management initiatives.

C. Marketing Materials and Collateral

To reach the defined target audience, a variety of marketing materials and collateral will be used, including but not limited to:

Brochures and flyers: Concise and visually pleasing materials that provide an overview of the LEARN program, its objectives and the value of participating.

Website content: A user-friendly website will be developed with clear navigation, detailed program information, detailed career pathway maps, informative PDFs and a 360-degree walk-through of an energy-efficient home with embedded videos and consumer checklists.

- Digital media assets: Engaging graphics for various social media platforms will be developed, conveying program updates, success stories and key information.

- LMS interface: A user-friendly LMS interface will make accessing relevant content easy for target audiences.
- Email campaigns: Targeted email campaigns containing informative content, newsletters, updates to the program and testimonials will be used to communicate with the desired audience.
- Infographics: Engaging infographics will help target audiences quickly and clearly understand and retain program information.
- Program guides: Informative program guides will help target audiences understand how to participate in the program.
- Event **banners and displays:** Engaging banners and displays about the LEARN program and information on how to sign up will be used when attending relevant industry events.
- Landing pages for digital ads**:** Landing pages with clear calls to action will be used if applicable to convert interested individuals or organizations into participants.
- Short webinars**:** Short webinars will be hosted on partner YouTube channels where applicable.

D. Stakeholder Engagement Plan

The stakeholder engagement plan aims to ensure that information is disseminated effectively to the various stakeholders, as regular sharing of progress and outcomes will enhance transparency. The various stakeholders involved in the LEARN program include:

- CBOs: An organization aimed at making desired improvements to a community's social health, well-being, and overall functioning.
    - Disadvantaged Workers: A disadvantaged worker for this program means a worker that lives in a high unemployment ZIP code that is in the top 25 percent of unemployment indicators of the CalEnviroScreen Tool.
- Market Actors: Market actors may include trade associations, manufacturers, distributors, retailers, designers/architects, contractors and other actors engaged in efforts to meet energy efficiency program goals.
- Program Participant: An attendee who enrolls in training and accesses the training for any length of time.
- Workforce Development Organizations: Organizations offering education and training programs to enhance the workforce's skills.
- SMEs: Individuals with deep understanding and knowledge in a particular area.
- Partners: Partners may include community colleges, trade schools and other organizations where a mutually beneficial relationship is established.
- CEEC **P**artners: CEEC partners will be educational organizations, such as community

colleges, four-year colleges, job training organizations, vocational schools and trade associations.

- Pro Bono Partners: Pro bono partners will be trusted messengers who interface with the target population. They will customize their engagement strategies to complement existing services. This could include offering information and referrals while delivering routine services, displaying LEARN program collateral in lobbies or at events, adding LEARN links to websites, etc.

To engage with the stakeholders mentioned above, a mix of traditional engagement methods and digital communication methods will be used, including phone, email, text, social media, surveys, handouts and in-person meetings. A tailored approach will be used to treat each stakeholder group according to their needs, interests and preferences. Stakeholders will have plenty of opportunities to ask questions, share feedback and share information. Regular updates will be shared with stakeholders to foster strong relationships during and after the program.

RHA Industry will be used to track stakeholder engagement and engage more effectively and efficiently to deliver a return on investment. RHA Industry will record the following:

- Contact information
- Communication with each stakeholder
- Sentiment
- Issues
- Analysis
- Reports

Each month a stakeholder engagement report will be generated to show what activities were undertaken, what stakeholders were involved and any other relevant outcomes. Collaboration with these stakeholders will infuse the program with new learning opportunities and innovations in technology and training delivery while ensuring training is accessible to diverse audiences.

E. **Evaluation and Measurement**

Evaluation and measurement may be tracked on an as-needed basis. Please refer to [Attachment 5: Quantitative Program Targets]

Attachment 10: Quality Assurance Plan

1. Introduction

A. Purpose

The Quality Assurance (QA) Plan describes the strategy and methods used to ensure that the LEARN program:

- Produces high-quality outputs (quality control/quality assurance)
- Seeks to continuously improve itself (quality improvement)
- Satisfies customers (customer-centric)

2. Quality Assurance Mission Statement

The LEARN program is dedicated to advancing energy education and professional development by providing comprehensive, no-cost webinars, online courses and other training resources tailored for a broad range of SDG&E customers, including trades professionals, homeowners and others interested in energy efficiency. By collaborating with educational institutions, we extend our mission to enrich existing academic curricula with cutting-edge educational resources, promoting a deeper understanding of energy efficiency and electrification practices.

Our commitment to quality educational delivery is anchored in deploying advanced educational practices, innovative digital tools, and software designed to ensure accessible, engaging and impactful learning experiences. We integrate strategic management, effective communication and the latest educational technologies into a cohesive framework that delivers high-quality educational content and training experiences.

The LEARN team is focused on the continuous improvement of our educational offerings, participant satisfaction and the rigorous evaluation of the quality and effectiveness of our services. This ongoing pursuit of excellence aims to identify and leverage opportunities to enhance our educational programs and resources.

The success of our program hinges on our adherence to stringent quality standards and QA methodologies that empower us to offer:

- Engaging and informative no-cost webinars and online courses developed through systematic, well-established processes (see Attachment 1.2 Training Partner Manual)
- No-cost certifications for DAWs
- Collaborative partnerships with educational institutions to supplement and elevate their existing courses with relevant energy education materials
- State-of-the-art, cost-effective educational technology, data management systems and outreach strategies maximize participant engagement and learning outcomes

Ensuring consistency and transparency in our educational methods and the communication of program results is crucial for achieving our goal of enhancing energy literacy and promoting sustainable practices among utility customers and the broader community. To this end, our program employs comprehensive tools for managing educational content, facilitating participant interaction, and tracking the progress and impact of our training initiatives.

3. Quality Assurance Plan Purpose

The LEARN program has developed this QA Plan to demonstrate how our team will monitor, assess and ensure adherence to processes, procedures, and standards to determine the quality and on-time delivery of all deliverables and services for the program. This plan will be the blueprint for maintaining consistent quality through all project components and tasks.

The QA Plan documents and describes the procedures by which the team assesses performance for all aspects of the program against contractual requirements.

4. Quality Assurance Plan Scope

LEARN has created a QA framework to form the basis of the complete quality management approach and strategy. The processes defined in the plan will be leveraged to implement quality into all aspects of performance. LEARN's workflow management software will guide and track the process to ensure compliance in a transparent manner.

The objective of the QA plan is to describe the roles and responsibilities and the policies and procedures that ensure consistency and quality throughout the projects. The objective enables the QA team to achieve critical measurable results for the program, such as:

- **Predictable Results:** The QA plan is to ensure that deliverables and services are produced in an efficient, effective, reliable, and predictable manner that will consistently produce results compliant with the contractual requirements of the program.
- **Error Prevention:** The QA plan prevents the introduction of errors into deliverables and services. This aspect of the QA plan includes the structured approach to pursuing continuous improvement in all aspects of the program.
- **M&V Documentation:** The QA plan ensures a structured approach to the defining, recording, and storing of documentation to support verification, validation, and traceability. See Attachment 7: Evaluation, Measurement and Verification (EM&V)
- .
- **Customer Satisfaction:** The QA plan ensures the customer receives the best possible deliverables and services.
- **Continuous Improvement:** Feedback from all of the above is used in an ongoing effort to improve LEARN's processes.

5. Quality Assurance Methodology

The LEARN team has developed a robust and flexible quality assurance (QA) framework built on the foundation of the LEARN quality metrics and KPIs. This framework enables a continuous improvement cycle by analyzing tracked metrics, evaluating outcomes and adjusting operational tactics to optimize outcomes. The KPIs set the thresholds for achieving operational success, and the QA methodology described below lays out objectives, procedures and team member responsibilities in implementing the LEARN QA Plan. The other two companion documents supporting the program's success are the Policies and Procedures Manual and the EM&V Plan.

A. Program Goals and Objectives Alignment

Objective: Ensure all program activities align with and support the established goals, adapting to meet evolving objectives and stakeholder needs for the highest quality energy efficiency training and customer education available to all.

Procedure: The LEARN team reviews all program activities against goals monthly. Project activities are adjusted based on the review and evolving program objectives and stakeholder needs.

B. Documentation and Reporting

Objective: Maintain accurate and comprehensive records of QA activities per the reporting requirements, participant feedback and other measured KPIs to identify areas for improvement and inform remediation plans.

Procedure: Track and document quantitative and qualitative performance metrics, formal and informal feedback received and action plans for program enhancement. Utilize a digital documentation system and standardized templates for consistency in quarterly QA reports, supplemented by stakeholder review meetings. Power BI and internal dashboards will provide critical visualizations to easily and continuously monitor program performance. Provide quarterly QA reports to stakeholders per the EM&V Plan.

C. Monthly Process Reviews

Objective: Regularly assess the effectiveness of QA strategies and tactics to ensure they are integrated into program operations and contribute to achieving goals.

Procedure: An internal monthly process review is conducted with LEARN staff to evaluate the effectiveness of existing QA strategies and identify opportunities for refinement. Power BI and database dashboard reports identify where KPIs or other qualitative metrics may need to be addressed.

These reviews involve assessing the integration of quality management practices into program operations and the effectiveness of those practices in achieving program goals.

D. Roles and Responsibilities

Objective: Define and communicate the QA team structure, ensuring clear understanding of roles, responsibilities and contributions to quality objectives.

Procedure: The QA Plan will be managed to adapt to and reflect the evolving needs and challenges of the program. The LEARN team has clearly defined the roles and responsibilities of the QA team:

- **Vice President:** Responsible for overseeing the LEARN program, ensuring that QA activities are followed and the team has needed resources to resolve identified quality assurance issues. Address all escalated quality assurance issues.
- **Program Manager:** Responsible for all oversight of the QA Plan implementation, ensuring the QA Plan is followed by all members of the LEARN team. The Program Manager is responsible for client engagement and key stakeholder issue resolution. Critical issues will be escalated to the Vice President. The Program Manager is also tasked with completing an annual review of this document.
- **Program Operations Manager:** Responsible for QA oversight of the program budget, reporting and invoicing aspects of the program.
- **Marketing and Outreach Manager:** Responsible for all QA oversight of marketing and outreach activities.
- **Program Administrator:** Responsible for QA oversight of training delivery, training partner QA resolution and escalating identified training QA issues.
- **Admin Assistant:** Responsible for tracking and internal reporting on all customer satisfaction and feedback per this QA Plan.

All team members are aware of their contributions to the QA process and are equipped with the necessary resources and training. Continuous training and development opportunities will be provided to the QA team to ensure they remain proficient in the latest quality management practices and tools.

E. M&V Documentation:

Objective: Establish a rigorous documentation system for monitoring, verification and traceability of program activities and outcomes.

Procedure: The LEARN program has developed a documentation system to record and store essential information about program requirements, decisions, actions and improvement measures.

All program outcomes and activities are verified, validated and traced. Specific details can be found in the EM&V Plan portion of this Implementation Plan.

F. Customer Feedback and Satisfaction

Objective: Achieve and maintain high levels of customer satisfaction.

Procedure: LEARN has implemented a digital feedback collection process for participants post-webinar and post-E-learning course completion. After each live webinar, a survey link will be sent to participants. At the end of each course delivered within the LMS, participants are prompted to complete the same survey before exiting the course. Responses are anonymous. Sample survey questions can be found in Attachment 1.2 Training Partner Manual.

Question 1 of the survey asks about the overall quality of the course. Results from this question are sent to SDG&E monthly and are a component of program KPIs. At least 90% of survey participants must rate the course "Very Good" to meet goals and at least 95% to meet KPIs.

LEARN has a customer feedback and complaint process (see 1.1 Policy and Procedures Manual) followed in case of customer concerns or low survey scores.

LEARN evaluates feedback monthly to ensure customer satisfaction aligns with goals.

G. Continuous Improvement Process

Objective: LEARN fosters a culture of continuous improvement based on feedback and performance data. This includes participants, CBOs, industry partners and CEEC partners.

Procedure: LEARN analyzes all feedback and performance data monthly. As a part of the program's monthly QA internal review, surveys and informal feedback are evaluated alongside all program KPIs.

When program metrics are near or drop below thresholds, adjustments to tactics are discussed, and action items are identified. When thresholds are not met on an ongoing basis, a root cause analysis will be conducted and new initiatives will be implemented as required to course correct.

H. Training Content and Delivery Quality

Objective: Ensure training content and delivery methods are current, accurate, and engaging.

Procedure: LEARN conducts annual content reviews and updates content accordingly. The LEARN team has decades of collective training and workforce development experience and participates in national stakeholder networks to ensure the training developed and delivered through the program effectively utilizes the continuously evolving technical tools and remote education practices.

Training content is reviewed before launching any new course, webinar, or E-learning medium. Feedback from industry partners is included in content reviews and revisions.

LEARN monitors course delivery methods and makes updates to ensure engaging participant experiences.

I. Accessibility and User Experience

Objective: Optimize accessibility and user experience for all program participants.

Procedure: Perform annual accessibility audits of program platforms and conduct internal reviews of customer-facing program platforms, including the LEARN website, Docebo LMS and individual course experience.

Platform Product Managers will implement user experience enhancements based on external feedback and internal periodic reviews.

J. Collaboration and Partnerships

Objective: Maximize the value and effectiveness of CEEC collaborations and partnerships.

Procedure: Partnership engagement is monitored monthly. Overall partnership effectiveness is evaluated annually.

LEARN develops and implements action plans for enhancing collaborative efforts on an ongoing basis.

6. Conclusion

The ongoing execution and evaluation of the LEARN QA Plan are the foundations of achieving the program's mission of delivering high-quality education, training, and support to its participants. By adhering to the structured approach and strategies outlined in this plan, the program commits to delivering services and outcomes that comply with contractual requirements and exceed all stakeholders' expectations, ensuring long-term success and sustainability.

The QA Plan will be reviewed and updated annually to reflect programmatic and stakeholder feedback, ensuring it remains relevant and effective.