Southern California REGIONAL ENERGY NETWORK

ENERGY EFFICIENCY PROGRAMS

SoCalREN Commercial Sector Hard-to-Reach Business Energy Advisor Program Implementation Plan

Prepared by the County of Los Angeles on behalf
of the Southern California Regional Energy Network

April 2025
Version 2.0
Program ID: SCR-COM-E4

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Program Overview

The SoCalREN Hard-to-Reach Business Energy Advisor (BEA) program is a commercial sector program that will reduce barriers to energy efficiency actions and program participation for hard-to-reach businesses in the SoCalREN territory. Program services focus on educating business owners about the cost of energy and the value of efficiency, connecting owners to commercial sector energy efficiency programs, and supporting applications for potential low or no-cost financing and funding for energy efficiency. For SoCalREN Commercial Programs' participants, HTR-BEA will provide a dedicated Energy Advisor as a single point of contact to coordinate delivery of services across programs and minimize complexity for business owners. Key program outcomes include supporting long term energy efficiency market success, improving energy knowledge and awareness among business owners, expanding access to capital to fund energy efficiency projects, and increasing participation in commercial sector energy efficiency programs serving this market segment.

Program Budget and Savings

Table 1: Program Budget and Savings		
1	Program Name	SoCalREN Hard-to-Reach Business Energy Advisor
2	Program ID number	SCR-COM-E4
3	Program Implementer	SoCalREN
4	Portfolio Administrator	SoCalREN
5	Program Implementer Type (IOU Core, Third-Party Solicited, REN/CCA)	REN
6	Portfolio Segment (Resource Acquisition, Equity, Market Support, or Codes and Standards)[1]	Market Support
7	Total Program Budget	$1,771,886.92
8	Program Budget by Year	2025 - $545,308.21 2026 - $641,578.71 2027 - $585,000.00
9	Program Duration (Start Date - End Date)	2025 - 2027
10	Total System Benefit (TSB) (Total Program TSB and TSB by Program Year)	$0.00
11	CO_2 (Lifecycle, First Year, Net, Gross)	N/A
12	KW (First Year, Net, Gross)	N/A
12	KWh (Lifecycle, First Year, Net, Gross)	N/A
13	Therms (Lifecycle, First Year, Net, Gross)	N/A
14	Program Cost Effectiveness: Total Resource Cost (TRC): (Total TRC and TRC by Year)	N/A
15	Program Cost Effectiveness: Program Administrator Cost (PAC): (Total PAC and PAC by Year)	N/A
16	Market Sector(s) (i.e., residential, commercial, industrial, agricultural, public or cross-cutting) If multi-sector, provide estimated % of the total budget for each sector)	Commercial

[1] D.21-05-031 Ordering Paragraph 2

Table 1: Program Budget and Savings		
17	Program Type (i.e., Non-resource, Resource)	Market Support
18	Delivery Type(s) (i.e., Upstream-Manufactured, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install,[2] Codes & Standards)[3]	Downstream
19	Intervention Strategies (e.g., Strategic Energy Management (SEM), Market Access Program (MAP), Direct Install, Incentive, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach, etc.)	Outreach, Education, Technical Assistance, and Finance Support
20	M&V Methods (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other (if applicable, describe Other M&V method))	Other

Implementation Plan Narrative

1. Program Description

The SoCalREN Hard-to-Reach Business Energy Advisor (BEA) program maximizes the impact for those customers who need it the most. 100% of customers will qualify as hard-to-reach customers, further identified through Low Income Low Access (LILA) and Disadvantaged Communities (DAC) zip codes. The program will employ in-community Energy Advisors (EAs) to serve as the initial point of contact to educate and enroll customers in the SoCalREN commercial offerings. This single point-of-contact approach will support the customer through their energy efficiency journey from education, project identification, technical assistance, project close-out, and ongoing support through energy benchmarking. EAs will support customers in identifying and applying for financing and local funding for activities to complete advanced energy and sustainability improvements beyond the current program offerings, i.e. DERs.

In-community EAs will also coordinate with local stakeholders such as local governments, including Tribal Nations, SoCalREN Regional Partners, local contractors, and community groups on outreach, business engagement, and continued program awareness.

The program will be offered in coordination with the SoCalREN Hard-to-Reach Commercial Direct Install (CDI) program and the SoCalREN Food Desert Energy Efficiency Equity (FDEEE) Program.

[2] https://cedars.sound-data.com/deer-resources/deemed-measure-packages/guidance/
[3] Database for Energy Efficiency Resources (DEER) 2026 Delivery Types

2. Performance Tracking

The primary Performance Metris, as specified in the Table below are:

Table 2: Metrics

Activity	Metric	Method	Frequency
Channel participation in SoCalREN Commercial programs	# of customers that completed an energy efficiency projects through a SoCalREN commercial program	As reported by SoCalREN Commercial sector program implementer	Annually
Enroll hard-to-reach customers in SoCalREN commercial programs	# of customers qualified as hard-to-reach # of savings in LILA communities # of savings in DAC communities	As reported by SoCalREN Commercial sector program implementer	Annually
Provide technical assistance services to Commercial sector program participants	# of projects receiving project management support	As reported by BEA	Annually
Hire staff representative of the communities served	# of jobs created in communities with BEA and CBO support	As reported by BEA	Annually
Outside dollars leveraged to support customers	Amount of outside funding received by program participants	As reported by BEA	Annually

3. Program Delivery and Customer Services:

The target market for the SoCalREN BEA program are hard-to-reach commercial customers operating in SoCalREN territory. The program will identify customers that are hard-to-reach, further identified through Low Income Low Access (LILA) and Disadvantaged Communities (DAC) zip codes.[4]

[4] LILA – Low Income Low Access and DAC – Disadvantaged Communities.

Program Strategies and Tactics

Outreach and Business Engagement: The SoCalREN BEA program will develop marketing and education materials, including print and electronic materials, to support outreach and engagement. BEA's will make initial contact through targeted outreach, including in-person site visits, direct mail, paid media, and community-based outreach organizations and local governments. All materials produced through the BEA program will be created in-language.

- Informational Materials
    - Program participant materials
        - Fact sheets
        - Interest form/application
        - Case studies
    - Web pages on socalren.org
- Educational Materials
    - Behavior modification opportunities
    - Energy efficiency education
    - Business case presentations
        - Cost savings over time
        - Balance sheet impact of measures offered
    - Training on equipment offered and installed
        - Value of energy benchmarking for long-term cost and use awareness
    - Energy financing customer education
        - Value of spreading costs over time at low interest rates
        - Small market financing products available to business owners
        - Actions to further reduce peak demand
    - Eligible energy efficiency programs and other programs
    - Highlight state, regional and local energy savings opportunities and SoCalREN incentive program offerings.

Energy Advisor Support: An Energy Advisor is assigned to each qualifying customer and will be the primary point of contact for all SoCalREN services through the duration of the program. The Energy Advisor collects energy usage, billing history, and operational and facility data, and is responsible for delivering energy financial analysis and recommendations. The Energy Advisor screens the customer's eligibility for SoCalREN Commercial Sector Programs and facilitates all interaction with those programs, including interactions with program staff, contractors, or vendors.

Stakeholder Coordination: The program will coordinate with SoCalREN Commercial Sector programs and associated market actors, such as contractors, equipment distributors, and non-REN program partners. Other stakeholders include local stakeholders such as local governments, including Tribal Nations, SoCalREN Regional Partners, local contractors, community groups and agencies such as the California Chamber of Commerce and US Small Business Administration.

Registration/Enrollment: Customers can register through multiple points of entry, including the SoCalREN website where they will be connected with an Energy Advisor to enroll them. Enrollment will also be available to the customer on-site with the assistance of an Energy Advisors with iPads. The Energy Advisors will also enroll customers in other SoCalREN commercial programs that they qualify for at that time.

Financial Analysis, Recommendations, and Referrals: The Energy Advisor will meet with customers to better understand the challenges and opportunities they face. The Energy Advisors will conduct a walkthrough assessment of the site to identify the energy savings opportunities, align those opportunities with the customer's stated challenges and interests, and present a customized business case that align with SoCalREN commercial offerings.

Financing and Funding Application Support and Submission: The program will identify zero interest rate or grant opportunities for customers in hard-to-reach areas, such a grants made by local Economic Development Corporations (EDCs), local Air Quality Management Districts, and Small Business Administration (SBA) offices. The program will support the customer in their application development and submittal.

Ongoing Customer Support: Energy Advisors will provide and coordinate training on any energy efficiency measures installed at the site to ensure persistence of savings. They will also benchmark each customer's site in order to provide ongoing support to monitor the continuity of savings and alert the customer of changes in their energy use and cost. This support will provide hard-to-reach customers with access to a tool that supports State energy efficiency and greenhouse gas reduction goals at no cost. [5]

4. Program Design and Best Practices

The Business Energy Advisor program's approach is designed to reduce market barriers and increase adoption of energy efficiency in hard-to-reach customers. The program's approach incorporates best practices and lessons learned, the addition of new tools and the use of software.

[5] AB: 802 California Building Energy Benchmarking

Table 3: Market Barriers and Intervention Strategies

Barriers	Program Intervention Strategies Based on Best Practices and Lessons Learned
Limited energy efficiency offerings for HTR facilities and projects	The program exclusively serves HTR customers, with additional qualifiers for LILA and DAC communities, ensuring services reach those who need it the most have not previously had access.
Limited staff to implement energy efficiency is deprioritized	The program provides a one stop shop with an Energy Advisor to advise and guide customers in accessing programs and increasing the ability to implement energy efficiency.
Limited energy efficiency awareness	The program will create awareness by delivering outreach through a community and customer-focused approach, with the support from local governments, community-based organizations, and SoCalREN Regional Partners
Outreach materials not presented in the language spoken by the customer	The Program will create and use materials and resources in the language that is spoken by each customer.
Customer hesitation to participate in programs due to lack of trust	The programs will provide customers with a single direct point of contact, in-person communication, and applicable content that supports their needs. The Energy Advisor will be representative of the communities they are serving and understand the needs of each customer.

Tools and Software Used

- Customer Platform: Energy Advisors will use an online platform for enrollment, assessment, to generate the business case for the customer.
- Benchmarking software: Energy Advisors will benchmark the site using Energy Star Portfolio Manager and other benchmarking software tools.

5. Innovation

The program will educate customers about the value of demand response (DR) enabled equipment where applicable and work with IOU DR programs to enroll customers in DR.

6. Pilots

The Business Energy Advisor program does not have any pilot elements, making this section not applicable.

7. Workforce Education and Training

The Business Energy Advisor program is not a Workforce, Education and Training Program, making this section not applicable.

8. Workforce Standards

The Business Energy Advisor program does not include the application of measures, making this section not applicable.

9. Disadvantaged Worker Plan

The program will coordinate with SoCalREN's existing Workforce, Education, and Training programs, making this section not applicable.

10. Market Access Programs

The HTR BEA Program is not a market access program, making this section not applicable.

11. Additional information

No additional information.

Supporting Documents

1. Program Manual and Program Rules

The following describes customer eligibility.

1.1 Eligible Measures

The HTR Business Energy Advisor program does not offer measure implementation, making this section not applicable.

1.2 Customer Eligibility Requirements

Customer eligibility requirements focus on the following factors:

- Receive services from SCE and/or SoCalGas.
- In SoCalREN territory.
- Is a hard-to-reach customer, further identified through Low Income Low Access (LILA) and Disadvantaged Communities (DAC) zip codes.
- Has the authority to make operational decisions regarding the served facility.
- Is willing to sign the participation agreement and accept SoCalREN terms and conditions.

BEAs collaborate closely with each participant during customer acquisition to ensure that program eligibility is reviewed, and that the customer is aware of program requirements.

1.3 Contractor Eligibility

The HTR Business Energy Advisor program does not offer measure implementation, making this section not applicable.

1.4 Upstream and Midstream Partners

The HTR Business Energy Advisor program does not offer measure implementation, making this section not applicable.

1.5 Additional Services

The HTR Business Energy Advisor will work closely with each participant to offer the following services:

- Customer Education (program offerings, energy use of new equipment if participates in SoCalREN commercial programs)
- Benchmarking (using ENERGY STAR Portfolio measures energy use and compares building's energy to similar buildings, past consumption, or a reference performance level)
- Financial Funding Options (financing/funding options for upgrades not covered through SoCalREN commercial program. Connect to other programs within the region that offer rebates/incentives and no cost grants).

1.6 Site Surveys

The HTR Business Energy Advisor program does not offer audits, making this section not applicable.

1.7 Program Quality Assurance Provisions

Quality Assurance

- Customer acquisition: Pre-qualification checklists to ensure customer eligibility is confirmed
- Equity qualifications: Hard-to-Reach customer, further identified through Low Income Low Access (LILA) and Disadvantaged Communities (DAC) zip codes, appropriate affidavits secured.
- Customer project: Program offering checklists are used for every project.
- Key software solutions: Prospector, Direct Install, and Photo-Capture are used to guide BEA's through the required data collection while geolocating for all SoCalREN commercial program participation possibilities.
- Project review: Project and measure review and approval process checklists are generated to communicate assurance processes to team members.

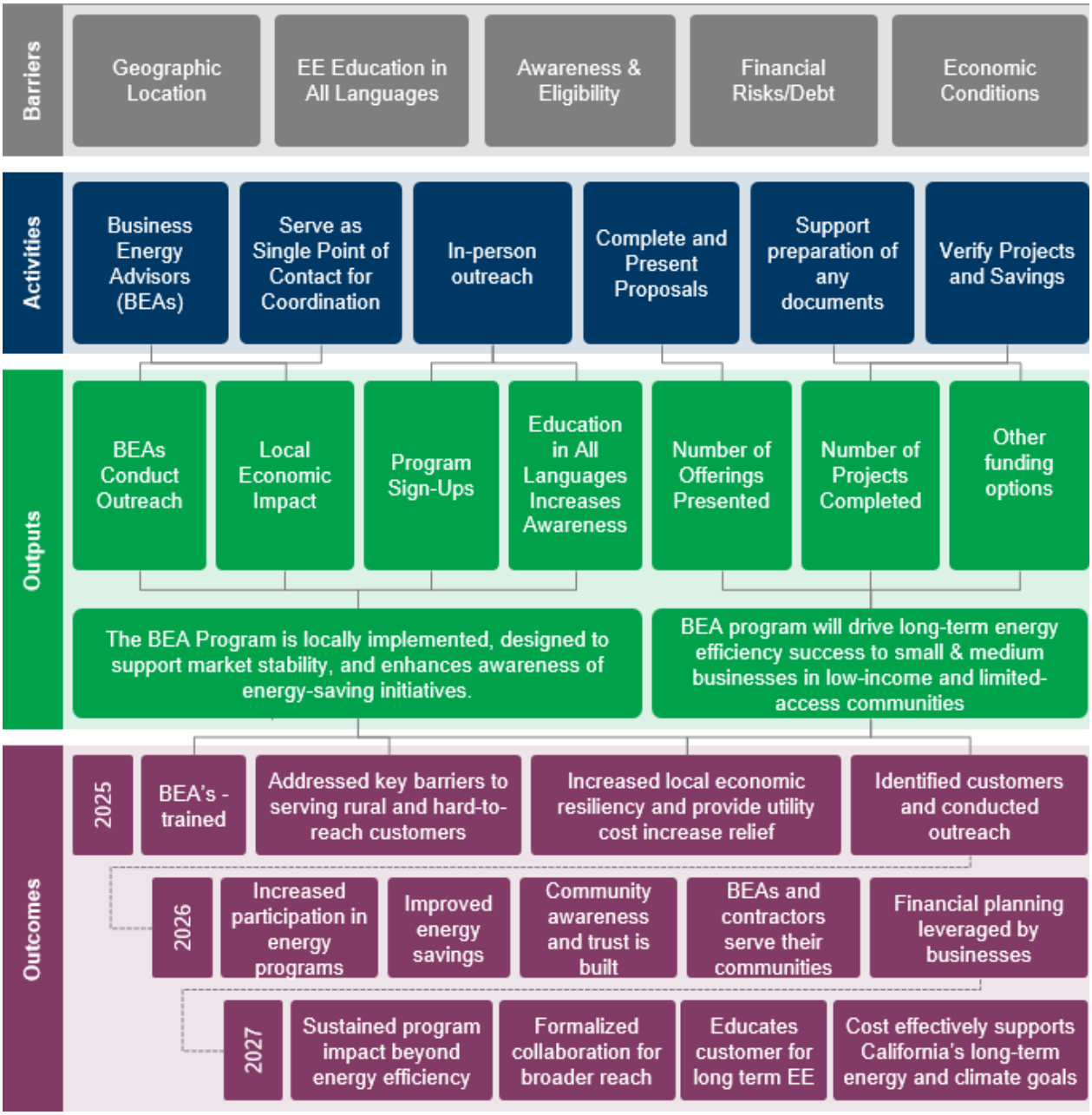
Quality Control

- BEA reviews pre-qualification checklists to ensure eligibility before committing services.
- Hard-to-reach status affidavits are reviewed for 100% of participants to confirm program eligibility.
- Low Income Low Access (LILA) and Disadvantaged Communities (DAC) zip codes+4 codes are reviewed.

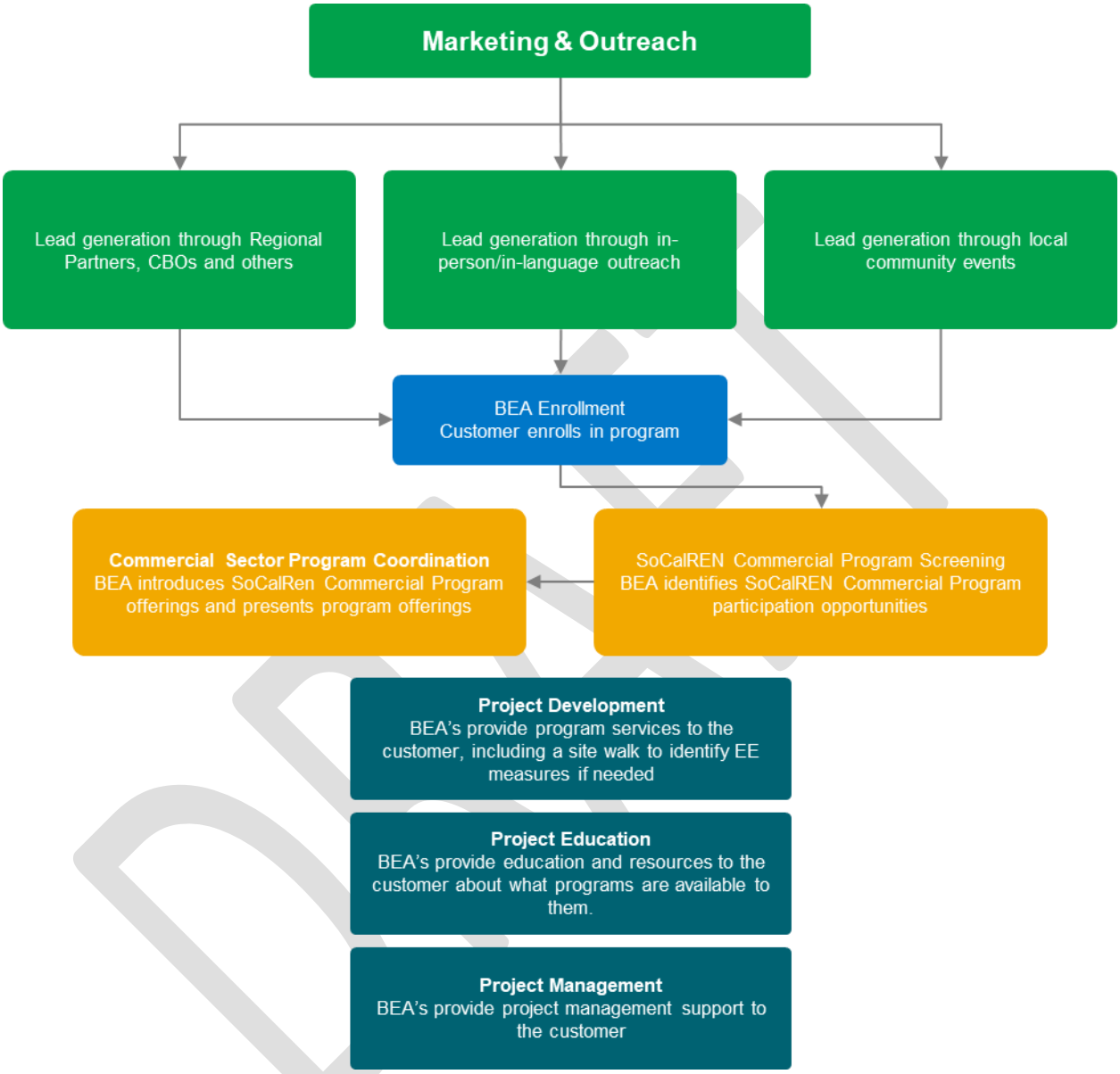
1.8 Other Program Metrics

- Number of customers that completed an energy efficiency project through a SoCalREN commercial program.
- Number of customers qualified as hard-to-reach.
- Number of customers in the Low Income Low Access communities.
- Number savings Disadvantaged Communities (DAC).
- Number of projects receiving project management support.
- Number of jobs created in communities with BEA and CBO support.
- Amount of outside funding received by program participants.

2. Program Theory and Program Logic Model



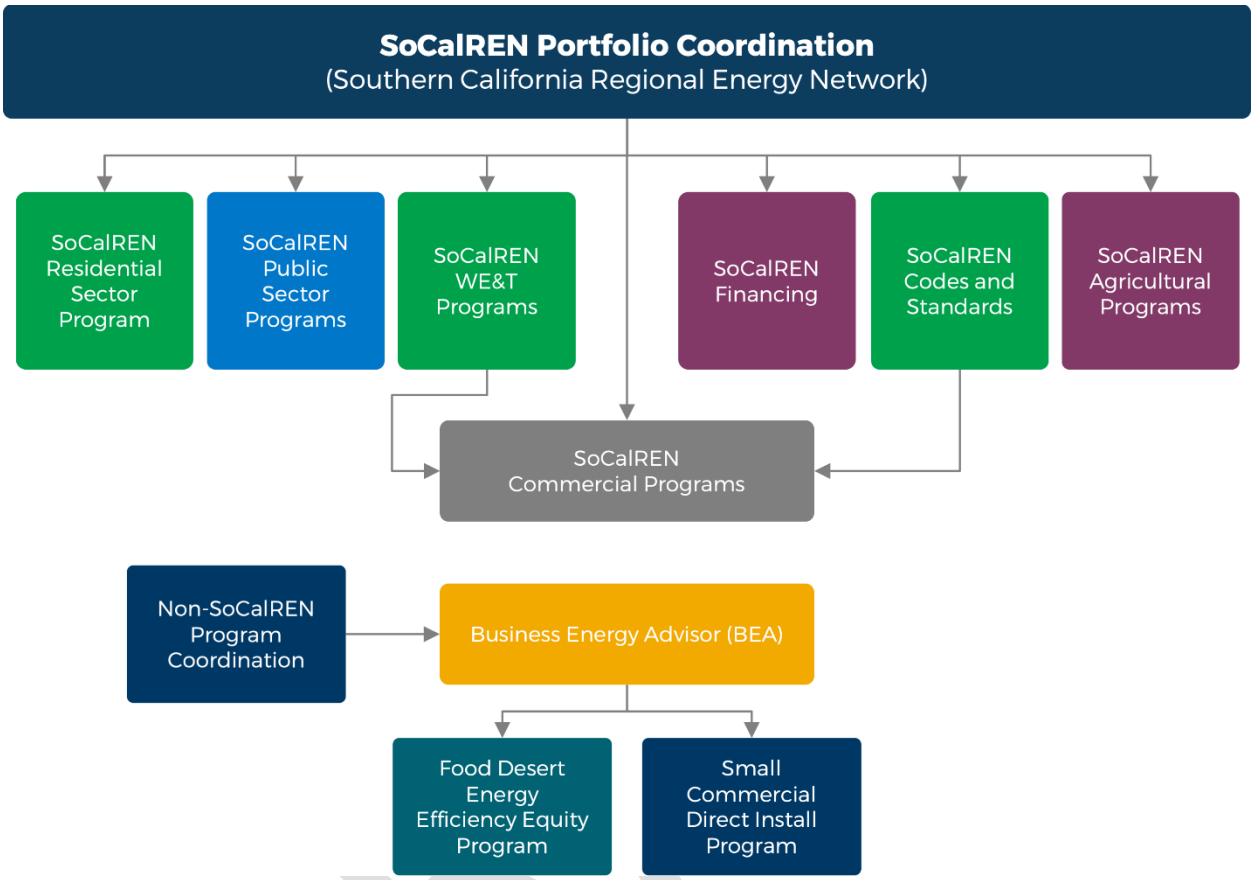
3. Program Process Flow Chart



4. Incentive Tables for Measures, Measure Packages

Not applicable.

5. Program Links



6. Program Measurement & Verification

The BEA program is a non-resource market support program that supports the long-term growth of the energy efficiency market. To demonstrate the program's contribution to the market support objectives, the following EM&V activities will be performed:

- SoCalREN as the PA will conduct a process evaluation through EM&V funding during year 2 of the program operation to identify any process improvements and program recommendations for future program years.
- The program administrator and program implementer will establish regular data reporting strategies that comply with any established reporting requirements.

1. Data Collection Strategies

The Program uses the following data collection through data management in a secure project customer relationship management (CRM) platform that tracks customer information, baseline condition equipment details, geotagged photographs, copies of affidavits, and SoCalREN commercial program alignment. This centralized data hub allows for detailed reports and dashboards to track progress towards program goals and key performance indicators.

Embedded within the project process is quality control checks: all project deliverables and project application/customer agreement materials are put through rigorous internal quality control checks prior to being delivered to clients or the CPUC.

2. Performance Metric Reporting

Timeline	Action	Key Performance Indicators
Monthly	Review program progress, discuss emerging barriers, and deploy optimizations. Key performance indicators include:	• Number of customers outreached • Number of customers enrolled • Number of customers enrolled in SoCalREN commercial offerings • Number of projects receiving project management
Annually	Review program progress, discuss emerging barriers, and deploy optimizations. Key performance indicators include:	• Number of customers qualified as hard-to-reach • Number of savings in LILA communities • Number of savings in DAC communities • Number of jobs created in communities with BEA and CBO support • Amount of outside funding received by program participants

3. **Independent Evaluations**
   SoCalREN collects the necessary data to support future independent evaluation and ensures that the required data is provided promptly.

7. Normalized Metered Energy Consumption (NMEC) Program M&V Plan

Not applicable

8. Multi-DER IDSM Pilots

Not applicable

9. SEM Programs Only

Not applicable