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Inland Regional Energy Network (I-REN) Technical Assistance and Strategic Energy Planning Program Implementation Plan

October 5, 2023

The Coachella Valley Association of Governments and San Bernardino Council of Governments have partnered with the Western Riverside Council of Governments to develop I-REN to serve the cities and communities of our region.



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Contents

Program Overview 2

Program Budget and Savings 2

1. Program and/or Sub-Program Name 2
2. Program / Sub-Program ID number 2
3. Program / Sub-program Budget Table 2
4. Program / Sub-program Gross Impacts Table..... 3
5. Program / Sub-Program Cost Effectiveness Total Resource Cost (TRC)..... 3
6. Program / Sub-Program Cost Effectiveness Program Administrator Cost (PAC) 3
7. Type of Program / Sub-Program Implementer (Program Administrator delivered, third party-delivered or Partnership): 3
8. Market Sector 3
9. Program / Sub-program Type..... 3
10. Market channel(s) 3

Implementation Plan Narrative..... 4

11. Program Description..... 4
12. Program Delivery and Customer Services 4
 - Strategic Energy Planning and EE Project Implementation Services..... 5
 - Continuous Engagement 6
13. Program Design and Best Practices..... 6
14. Innovation 7
15. Metrics 8
16. For Programs claiming to-code savings 8
17. Pilots..... 8
18. Workforce Education and Training 8
19. Workforce Standards 8
20. Disadvantaged Worker Plan 8
21. Additional information 9

Supporting Documents..... 10

1. Program Manuals and Program Rules 10
2. Program Theory and Program Logic Model..... 10
3. Process Flow Chart 11
4. Incentive Tables, Workpapers, Software Tools 11
5. Quantitative Program Targets 11
6. Diagram of Program 12
7. Evaluation, Measurement & Verification (EM&V) 12
8. Normalized Metered Energy Consumption (NMEC) 13



PROGRAM OVERVIEW

The Inland Regional Energy Network's (I-REN) Technical Assistance and Strategic Energy Planning program (TA) will provide short-term and mid-term technical support for local governments, special districts, school districts, and tribes to increase energy efficiency in publicly-owned facilities. Additional support and technical services will be provided to design high performing, energy efficient buildings. The program will develop a regional benchmarking and funding and financing resource, the Building Upgrade Concierge (BUC) for local governments, special districts, and tribal communities with technical guidance and tools to inform and enable energy improvements. I-REN will provide concierge-style support for local governments' EE projects to help fill gaps in staff capacity and other resources.

PROGRAM BUDGET AND SAVINGS

1. Program and/or Sub-Program Name

Technical Assistance and Strategic Energy Planning

2. Program / Sub-Program ID number

IREN-PUBL-001

3. Program / Sub-program Budget Table

Table 1: Program Budget Table

Technical Assistance and Strategic Energy Planning	2022	2023	2024	2025	2026	2027
Administration	\$22,723	\$152,400	\$146,590	\$155,361	\$158,647	\$160,509
Marketing, Education, & Outreach	\$16,468	\$153,111	\$189,130	\$213,526	\$217,982	\$220,460
Implementation (Non-Incentives)	\$175,946	\$2,425,714	\$2,726,745	\$2,731,903	\$2,725,947	\$2,775,976
Incentives	\$0	\$0	\$0	\$0	\$0	\$0
Total	\$215,137	\$2,731,225	\$3,062,465	\$3,100,790	\$3,102,576	\$3,156,945



4. Program / Sub-program Gross Impacts Table

N/A

5. Program / Sub-Program Cost Effectiveness Total Resource Cost (TRC)

N/A

6. Program / Sub-Program Cost Effectiveness Program Administrator Cost (PAC)

N/A

7. Type of Program / Sub-Program Implementer (Program Administrator delivered, third party-delivered or Partnership):

Third party-delivered

8. Market Sector

Public

9. Program / Sub-program Type

Non-resource, equity segment

10. Market channel(s)

Technical assistance, partnership building, outreach and education

Table 2: Campaign Goals and Timeline

Phase	Key Deliverables	Dates
Launch readiness	<ul style="list-style-type: none"> Program design Identify implementer Implementation Plan Program marketing materials 	Q1 2022 - Q2 2023
Program ramp-up	<ul style="list-style-type: none"> Program launch to customers Program deliverable and template development 	Q2 - Q4 2023
Program steady state	Program deliverable implementation	Q2 2023 - Q2 2027
Program ramp down	Program ramp down plan	Q3 - Q4 2027



IMPLEMENTATION PLAN NARRATIVE

11. Program Description

The three councils of government (COGs) that make up I-REN are Western Riverside Council of Governments (WRCOG), San Bernardino Council of Governments (SBCOG), and Coachella Valley Association of Governments (CVAG) have direct relationships and a history of collaborating with the many government jurisdictions in their territory. The TA Program leverages I-REN's long-standing relationships and regional expertise to build local government capacity and knowledge to complete energy efficiency upgrades to public facilities and buildings strategically and effectively. The TA Program will include customized technical assistance to local governments to support EE projects including strategic energy planning and benchmarking. I-REN will also develop tools and resources to increase public sector participation in other federal, state, and local programs. To meet these goals, the TA Program aims to achieve the following objectives:

1. Provide local governments with support and resources to develop and implement their strategic energy plans and EE projects.
2. Help local governments to afford and finance a range of EE upgrades.
3. Establish one-on-one support for local governments' EE projects.
4. Develop or enhance strategic energy plans to connect local government goals related to climate, resilience, and economic development to EE programs and adoption.
5. Create resources for the public sector to tap into EE and distributed energy resources programs offered by other providers and investor-owned utilities.

12. Program Delivery and Customer Services

I-REN offers customized and objective project management, financial, and engineering services through a concierge-style approach that helps agencies meet their climate, energy, and resiliency goals. Each participating agency will be assigned a dedicated project manager (PM) for streamlined service delivery that provides high-touch customer service from EE project identification through completion. The PM will introduce public agencies to I-REN's public sector portfolio of programs and other energy programs to ensure the customer receives the most applicable and beneficial services for their unique needs. TA program services are outlined below.



Strategic Energy Planning and EE Project Implementation Services

- **Utility and Facility Data Collection and Benchmarking Support** - I-REN helps the agency collect data from their utility and facility data such as square footage and year built. I-REN supports the agency with benchmarking, such as by creating/updating ENERGY STAR Portfolio Manager (ESPM) and Building Upgrade Concierge (BUC) service accounts to provide both initial and ongoing high-level analysis of their portfolio's energy consumption.
- **Energy Resiliency Roadmap Development** - The PM and the agency will examine the agency's energy goals and conduct an iterative feedback process to develop a customized strategic energy plan, or "Energy Resiliency Roadmap". The roadmap will describe a phased course of action to meet the agency's needs and priorities. The Energy Resiliency Roadmap may prioritize some sites for immediate EE project implementation and others for mid and long term project support.
- **Energy Audit** - Once a potential EE project is identified, I-REN will provide an energy audit at the site of interest. The first step during the audit is conducting a desktop review of facility site plans and equipment data. These building plans and datasets are shared with an engineering consultant for review to ensure the subsequent site visit is cost effective and efficient. After the desktop review, the PM will schedule an audit kick-off meeting with the agency. During this meeting, the project engineer will ask site-specific questions to guide the site visit and audit and to ensure resources are focused on equipment in need of upgrades. After walking the site, the engineer develops a preliminary list of EE retrofit measures or operational and maintenance improvements for further detailed analysis.
- **Preliminary Measures List** -Includes high-level energy savings, cost estimates, and estimated utility incentive amounts based on applicable energy incentive programs. The agency will confirm with the PM which measures they wish to implement and will select their preferred incentive program.
- **Project Summary, Funding and Financing Services** - After agency buy-in on measures, the PM confirms available funding and financing pathways for the project. Next, the PM schedules a meeting to review the findings of the energy audit and financial analysis with the project engineer and key agency staff. Once the agency has obtained staff approval to move forward with the EE project, I-REN assists with applicable incentive applications. If the project is using the I-REN Public Buildings Normalized Metered Energy Consumption Incentive program (NMEC program), the project team will develop a Project Feasibility Study to demonstrate program influence and submit the application to the public sector NMEC program for review and approval.
- **Energy Resiliency Opportunity Report** - Based on the recommendations outlined in the Energy Roadmap, I-REN will deliver an Energy Resiliency Opportunity Report and a project summary. This report will provide agencies with high-level analysis and education on distributed energy resource and resilience next steps. The analysis will assess facilities identified for resiliency opportunities (e.g. distributed energy resources) based on existing infrastructure, energy needs and back-up requirements, and community benefit to vulnerable populations.



- **Design and Procurement Support** - I-REN provides customized assistance to agencies tailored to their preferred procurement method and requirements. Agencies may choose to self-perform the work, manage their own competitive bid solicitation, or select another approach such as leveraging Energy Service Company (ESCOs) or cooperative procurement contracts. The project manager may assist agencies with council or board approvals by packaging materials, developing presentations for council or board approval, and more, depending on the agency's needs.
- **Construction Support** - Once an agency authorizes construction, the PM ensures the project scope is implemented as designed so expected EE savings are realized and incentives and financing are secured. I-REN reviews contractor submittals for EE measures to verify work is performed according to design specifications and applicable incentive program requirements.
- **Project Closeout** - Once construction is completed, the PM and engineering consultant support the agency with any training necessary to operate and maintain the new equipment so all expected project benefits are realized. The project engineer is also available to ensure that equipment is properly operating and commissioned. I-REN supports any post-project incentive requirements, such as the development and submission of an Installation Report for the NMEC program.

Continuous Engagement

I-REN has multiple engagement strategies that include both stand-alone and complementary support to EE projects, including:

- **Territory-wide Orientations** - In collaboration with all I-REN programs, the TA program conducts outreach through in-person orientations designed to introduce agencies to program offerings and initiate services.
- **Capacity Building** - The capacity building service offers practical and essential training for agency staff on topics such as funding and financing, critical facility resilience, and operations and maintenance best practices.
- **Legislative Body and/or Community Check Presentations** - I-REN facilitates check presentations to governing boards, councils, or other community-recognized avenues. The check presentation will spotlight the financial resources secured by the agency, in partnership with I-REN, to advance the agency's energy goals and encourage continued EE investments.
- **Social Media Posts** - I-REN develops social media content spotlighting agency achievements to post on I-REN social media platforms.

13. Program Design and Best Practices

The TA Program's design was developed in response to challenges local governments face with EE improvements. I-REN's local governments have limited incentives to complete energy upgrades and find it difficult to maintain and upgrade their facilities due to lack of funding for capital improvements, a lack of awareness related to energy efficiency and other EE program opportunities, limited time, limited staff resources, and other conflicting priorities.



Strategies to achieve I-REN's goals for the Public Sector will emphasize "aggressive efficiency for jurisdiction-owned buildings,"¹ and EE improvements to existing buildings that serve rural, low income, moderate income, and disadvantaged communities. I-REN will provide technical assistance to local governments to support energy efficiency projects, including strategic energy planning and benchmarking. I-REN will also develop tools and resources to increase public sector participation in other federal, state, and local programs.

14. Innovation

I-REN sees a critical need to accelerate action in the region, a historically underserved territory. The TA Program will focus on catalyzing current local government activities related to climate change through targeted, tailored energy efficiency programs, and layering other efforts to increase impact. The program is implementing the following innovations:

- **Deep-routed relationships with the region-** As dedicated representatives of local government, the I-REN consortium members bring established connections from their work serving this region and can provide support to fill gaps in existing EE services. I-REN establishes a locally administered regional energy network, ensuring ratepayers in this region can become active participants in meeting California EE goals.
- **Insight into the region's unique challenges-** As a collective, the councils of government that make up I-REN have implemented EE services locally for the better part of a decade, and have established the skill sets, knowledge, and networks to identify and address the unique challenges and opportunities head-on. The issues and concerns of the region require a consistent local presence to help transition to a clean economy and to reduce energy use effectively. I-REN has designed its Public Sector strategies and tactics to help local government agencies, tribal leadership, and staff at school districts and special districts overcome participation barriers to improve their facilities' energy performance and harvest "stranded" energy savings.
- **Local resilience education and support-** Recognizing that across the I-REN territory, communities face unique yet ongoing climate and energy barriers and risks, I-REN will collaborate with each agency to identify current energy priorities and needs to create a customized Energy Resiliency Roadmap. The roadmap will be an actionable plan that outlines local climate and energy vulnerabilities (climate, social, and economic) and identifies projects and opportunities to address those threats.
- **Local funding/financing resources database and benchmarking tool-** BUC is a one-stop shop for information on programs and incentives offered by other Program

¹ Existing Buildings Energy Efficiency Action Plan, Strategy 1.7 Local Government Leadership. <https://efiling.energy.ca.gov/getdocument.aspx?tn=206015> Accessed October 2020.



Administrators and allows agencies to run reports on their energy usage, greenhouse gas emissions reduction, track projects, and more.

15. Metrics

Based on intervention strategies I-REN developed for public sector, the following are examples of metrics that will track program performance:

Table 3: Metrics and methodology

Metric	Method	Frequency
Program services provided	Number of agencies leveraging services and receiving program support	Annually
Benchmarking services provided	Number of agencies supported with energy benchmarking	Annually
EE projects implemented	Number of agency EE projects implemented	Annually
Funding/financing support provided	Number of agency projects that receive financing and external funding support	Annually
Outreach and engagement reach	Number of participants at workshops, webinars, and community outreach initiatives	Annually

16. ___For Programs claiming to-code savings

Not applicable.

17. Pilots

Not applicable.

18. Workforce Education and Training

While there are no direct workforce education and training efforts, this program aims to provide technical assistance, local resources, and direct support to develop and implement strategic energy plans for the public sector.

19. Workforce Standards

Not applicable.

20. Disadvantaged Worker Plan

It is a priority of this program to target and serve disadvantaged and underserved communities.



21. Additional information

Not applicable.



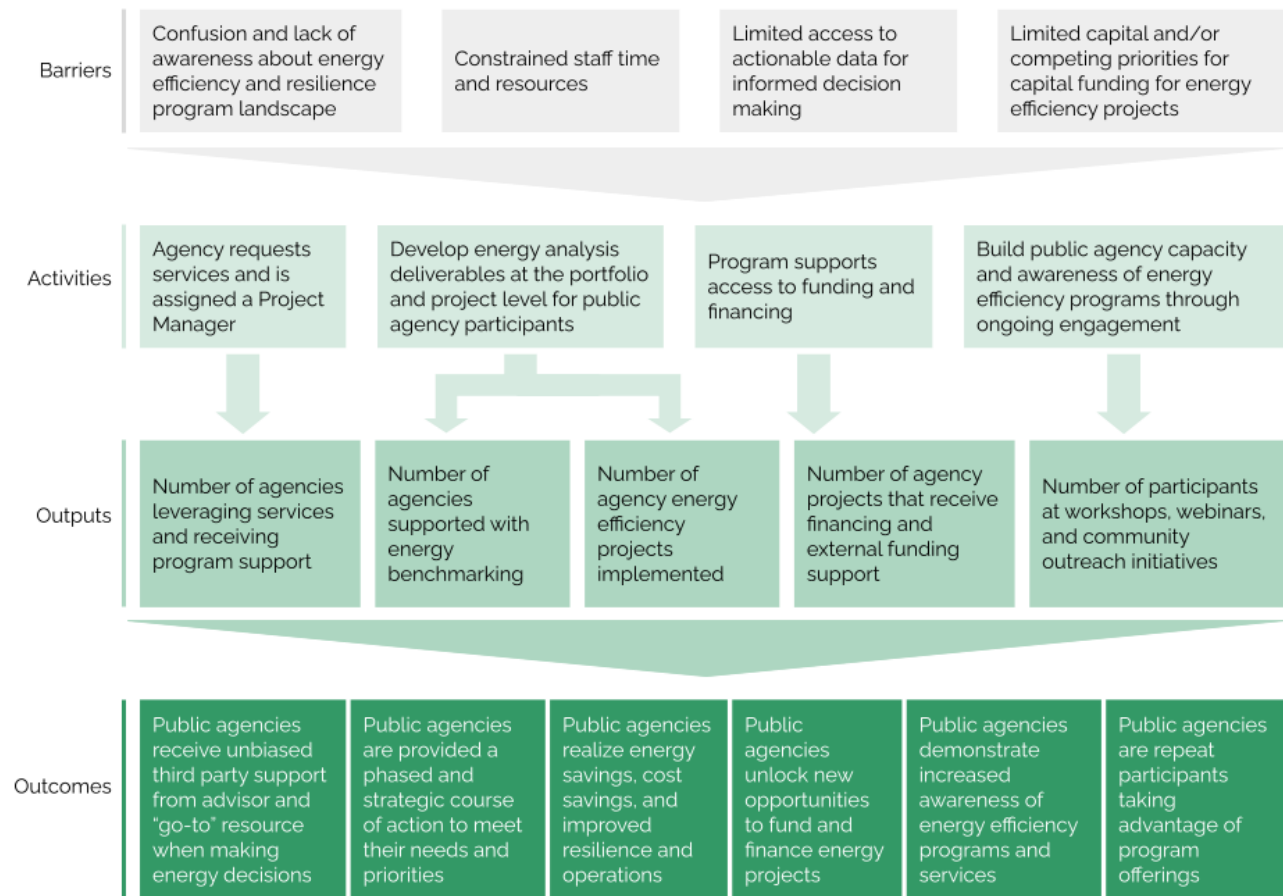
SUPPORTING DOCUMENTS

1. Program Manuals and Program Rules

The TA Program maintains a Program Manual that outlines policies and procedures and serves as a guideline for program implementation.

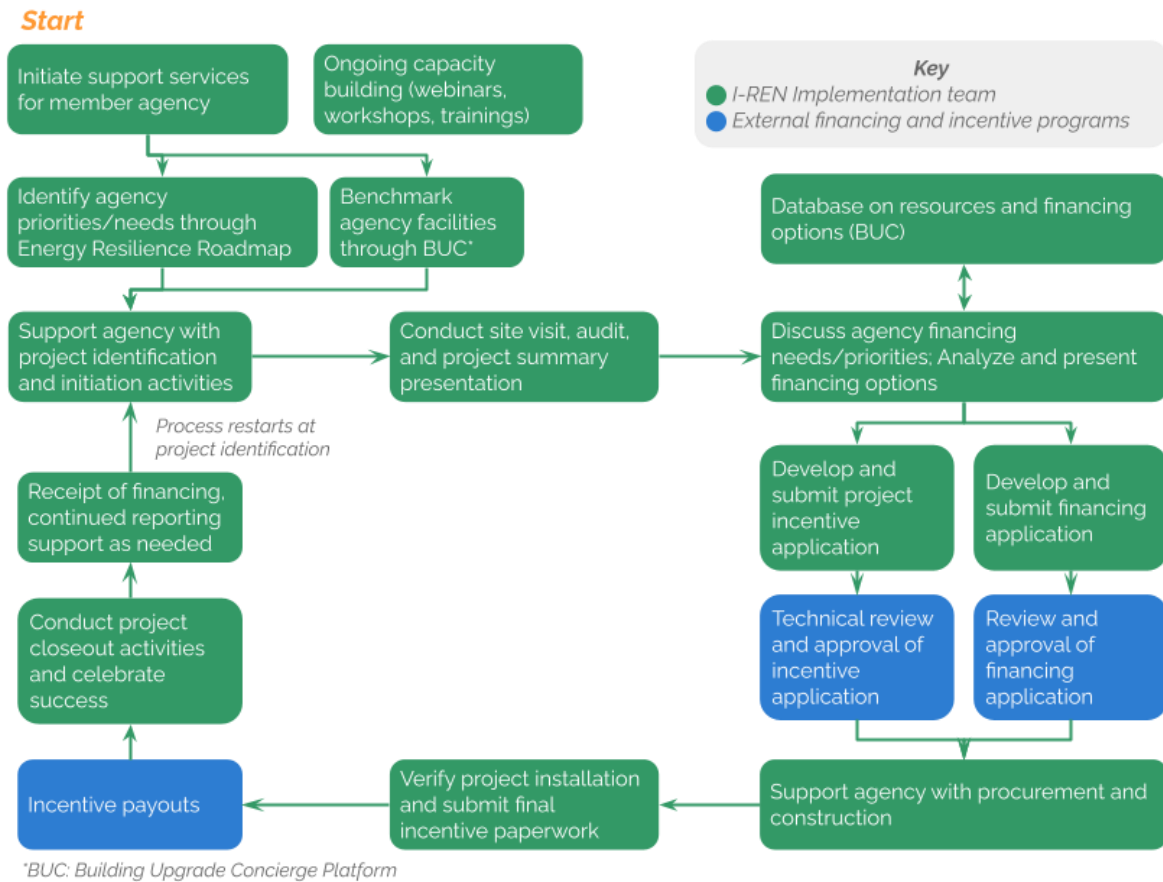
2. Program Theory and Program Logic Model

Figure 1: Program Logic Model



3. Process Flow Chart

Figure 2. Process Flow Chart



4. Incentive Tables, Workpapers, Software Tools

Not applicable.

5. Quantitative Program Targets

Table 4: Quantitative Program Targets

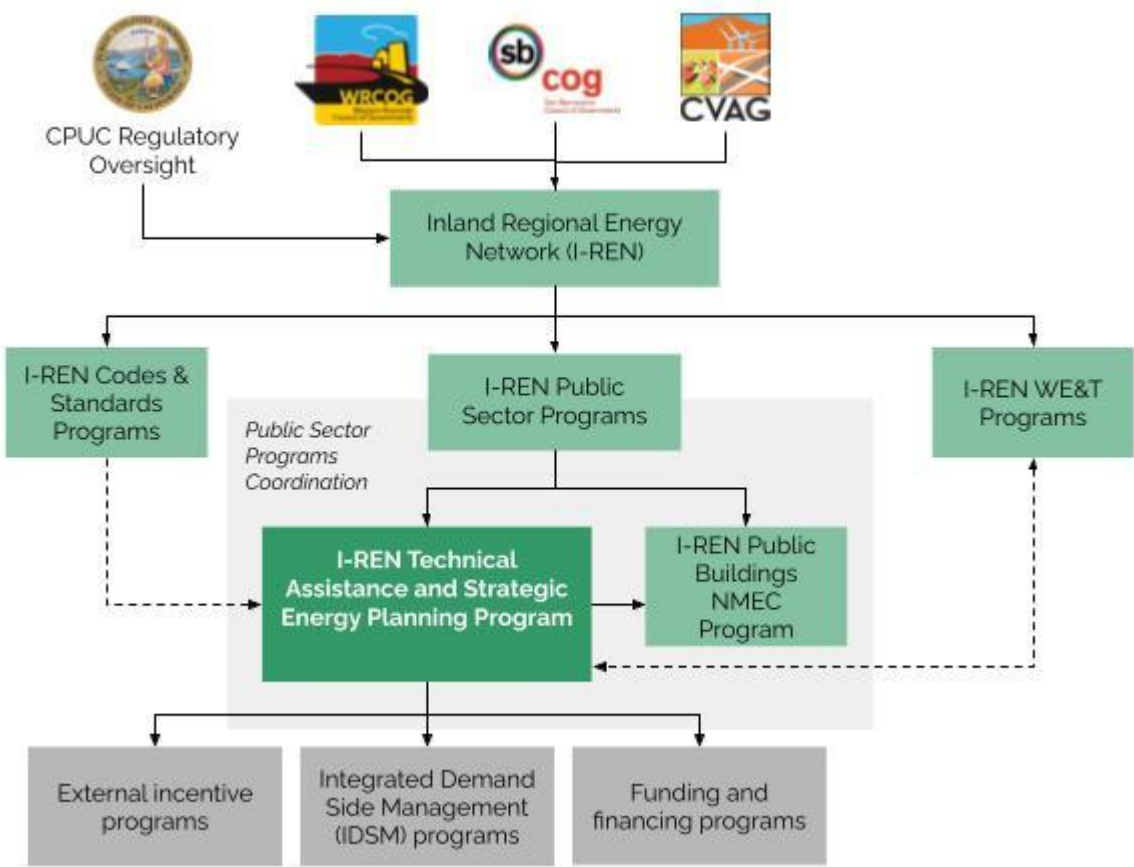
Period	Metric	Target
2022 - 2027	Orientations for public agencies	15
2022 - 2027	Agency kick-off meetings	60
2022 - 2027	Energy benchmarking services provided by agency	60
2022 - 2027	Energy Resilience Roadmaps delivered	50



2022 - 2027	Energy audits conducted by site	200
2022 - 2027	Project financial analysis delivered by project	150
2022 - 2027	Design and/or construction phase support provided by project	50
2022 - 2027	Funding and/or financing application support provided by application	70
2022 - 2027	Webinars and workshops conducted	20

6. Diagram of Program

Figure 3. Diagram of Program



7. Evaluation, Measurement & Verification (EM&V)

I-REN will collaborate with the CPUC and stakeholders to ensure that data collection activities are embedded in Public Sector Program design to capture the information necessary to meet evaluation requirements and to expand the understanding of EE potential and best practices in this sector. A database within a customer relationship management (CRM) system will be used to track information about the customer,



identified projects and goals, and other details that will help show the impact of this program. Once information is gathered, it will be entered in the database and used to generate reports. Data will be shared on a quarterly basis or ad-hoc as requested.

8. Normalized Metered Energy Consumption (NMEC)

Not applicable.

