2025-2026 San Joaquin Valley and High Sierra Joint Cooperation Memorandum

Central California Rural Regional Energy Network (CCR REN)

Southern California Regional Energy Network (SoCalREN)

Pacific Gas and Electric Company (PG&E)

Southern California Edison Company (SCE)

Southern California Gas Company (SoCalGas)

INTRODUCTION

This is the first Joint Cooperation Memo (JCM) between Central California Rural Regional Energy Network (CCR REN), Southern California Regional Energy Network (SoCalREN), Pacific Gas and Electric Company (PG&E)[1], Southern California Edison Company (SCE) and Southern California Gas Company (SoCalGas). This JCM covers CCR REN programs offered in the San Joaquin Valley (SJV) and High Sierra and does not cover programs offered in its Central Coast territory (the counties of San Luis Obispo and Monterey counties). The Portfolio Administrators (PAs) all have committed to collaborating and coordinating to ensure the best service to participating customers, while ensuring there is no duplication of service. This JCM provides an overview of the programs offered by each PA in overlapping territory; a discussion of potential program overlap by sector, with details about collaboration methods that can be used to mitigate customer confusion, streamline customer handoffs, and avoid duplication. Finally, the identification of the REN criteria for each CCR REN program, as directed by the California Public Utilities Commission (CPUC) in Decision (D.) 12-11-015 and reaffirmed in D.19-12-021. This JCM covers energy efficiency program activity and collaboration for program years 2025 and 2026.

GEOGRAPHIC OVERLAP

CCR REN is comprised of local government and non-profit organizations that provide energy efficiency programs to three regions of California: the Central Coast, the Eastern Sierra, and the San Joaquin Valley. The combined CCR REN service territory has a population of 5.4 million people, representing approximately 14% of California's total population that covers approximately 50,000 square miles and serves 14 counties. As a result of the large geographic territory with different shared Portfolio Administrators and a service territory that is not contiguous, the CPUC in Decision (D.) 23-06-055 directed CCR REN to submit JCM's based on its geographic regions.[2] This JCM involves the jurisdictions within the SJV (Fresno, Kern, Kings, Madera, Merced, San Joaquin, Stanislaus and Tulare counties) and High Sierra (the counties of Inyo and Mono) regions.

While there is some PA overlap in all of the SJV and High Sierra territory, no PA is in all of the same territory. Accordingly, this JCM relates to where there is overlap and the coordination specific to those PAs and programs is provided below.

BACKGROUND/REGULATORY GUIDANCE

The CPUC's Decision (D.)18-05-041 requires Energy Efficiency (EE) PAs with overlapping service areas to submit a JCM to coordinate program activities. Specifically, the directive states:

> *We will require the PAs (RENs, IOUs, and CCA) to develop a joint cooperation memo to demonstrate how they will avoid or minimize duplication for programs that address a common sector (e.g., residential or commercial) but pursue different activities, pilots that are intended to test new or different delivery models for scalability, and/or programs that otherwise exhibit a high likelihood of overlap or*

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[1] As directed by the CPUC in D.23-06-055 COL #17, CCR REN and PG&E are also part of *the Central Coast JCM* that also includes the Tri-County Regional Energy Network. The same program years are covered.

[2] D.23-06-055 p 24; Ordering Paragraph #8, p 121

duplication and are not targeted at hard-to-reach customers. For such programs, each PA must explicitly identify and discuss how its activities are complementary and not duplicative of other PAs' planned activities.[3]

Furthermore, CPUC D.23-06-055 establishes additional requirements for PAs submitting JCMs. The decision states in ordering paragraph (OP) 35:

This decision supersedes D. 18-05-041 and D.21-05-031 with respect to the timing and submission of Joint Cooperation Memoranda (JCM). Portfolio administrators must submit JCMs every two years, within 60 days after Commission approval of the last of each JCM's portfolio administrator's true-up advice letters and mid-cycle advice letters (as applicable), to the California Energy Data and Reporting System, with notice to the service list of Rulemaking (R.) 13-11-005 or a successor proceeding.

The same decision also states in OP 34:

Bay Area Regional Energy Network, Southern California Regional Energy Network, Tri-County Regional Energy Network, and Rural Regional Energy Network shall, for programs that only meet the criterion of serving hard-to-reach customers, include in their Joint Cooperation Memoranda a description of how they will target (i.e., market and conduct outreach to) and to primarily serve hard-to-reach customers or specific hard-to-reach customer segments.[4]

D.23-06-055 also directed the IOU PAs to "convey information to third-party bidders during the solicitation process, for buildings that have a potential to be served by both IOUs' third-party implementers and regional energy networks (RENs), about RENs' efforts to identify hard-to-reach customers or buildings to target for marketing of REN programs."[5] Specific to the newly approved RuralREN, in this Decision the Commission directed that three separate JCMs are required due to the geographic diversity and overlap with PAs: Central Coast - JCM with PG&E, San Joaquin Valley and High Sierra - PG&E, SCE, SoCalREN and SoCal Gas, and North Coast – RCEA and PG&E.[6]

Finally in D. 24-09-031, the Rural Regional Energy Network, approved in D.23-06-055, was split into two different geographic territories, Northern California Rural Regional Energy Network, and Central California Rural Regional Energy Network (CCR REN)[7]. While the Commission approved a change in the administrator, the approved program portfolio remained the same. The Commission also continued to require JCMs for all administrators, as discussed in D.19-12-021 and D.23-06-055[8], and reiterated that the specific requirements articulated in D. 23-06-055 remained in effect. Accordingly, this JCM is between CCR REN, SoCalREN, PG&E, SCE, and SoCalGas, and is referred to as the SJV and High Sierra JCM and relates to the programs offered in jurisdictions within the SJV counties of Fresno, Kern, Kings,

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[3] D.18-05-041 at p.97

[4] D.23-06-055 at p.137, Ordering Paragraph (OP) 34.

[5] D.23-06-055 at p.130, OP 33

[6] D.23-06-055, page 24

[7] D.24-09-031, p. 43, Conclusion of Law #17

[8] D.23-06-055 COL 9

Madera, Merced, San Joaquin, Stanislaus and Tulare counties, and the High Sierra counties of Inyo and Mono only.

GENERAL PORTFOLIO COORDINATION

CCR REN, SoCalREN, PG&E, SCE and SoCalGas (hereinafter referred to as the "Joint PAs") will work together to establish methods of communication and collaboration. CCR REN will leverage existing meetings and coordination efforts that have been established in this shared territory but also acknowledge that not all of the CCR REN territory encompasses the PAs participating therein. The Joint PAs will collaborate to ensure that their respective overlapping regional programs do not result in unnecessary duplication or cause customer confusion. The Joint PAs can derive additional value by providing information and referrals to programs across all program implementers, including those outside each other's implementation focus.

The majority of the coordination activities will take place at the sector level. However, on the portfolio level, the Joint PAs will coordinate as needed by email and through meetings to provide updates on major portfolio or program changes.

DATA SHARING PROTOCOL

PG&E, SCE and SoCalGas (the "Joint IOUs") have data governance and protection obligations for sharing any customer data. Before the Joint IOUs share data that they are authorized to share by applicable law and/or tariff for double-dip check purposes or to support a CCR REN program, the following minimum data security and privacy protocols need to be completed:

- The party seeking customer data has a contract with the County of San Luis Obispo on behalf of CCR REN or with the lead contractor for a CCR REN program that includes acceptable privacy and data protection and liability provisions.
- The party seeking data has executed a Non-disclosure Agreement (NDA) with the relevant Joint IOU(s).
- The party seeking data has completed the relevant Joint IOU(s) Third-Party Security Review (TSR) and TSR renewals, as required by the Joint IOU(s).

In D. 23-02-002 the Commission ordered all IOUs to share certain categories of disaggregated data requested by RENs and third-party implementers and/or their authorized agents within ten days after notifying the requestor that the requestor meets the following requirements:

- A current cyber security review by each IOU supplying confidential information.
- A non-disclosure agreement directly with each IOU supplying confidential information.
- The ability to receive secure data transmissions from the IOU.
- A current contract for the program, either as the program administrator or as prime or sub-contractor with a statement of work that requires all the confidential data received.[9]

[9] D.23-02-0023 at p. 63-64, OP 19.

The County of San Luis Obispo, on behalf of CCR REN will provide SCE as the fiscal agent, with a quarterly financial forecast update and quarterly Total System Benefit[10] (TSB) forecast update. The quarterly financial forecast update is the financial payments The County of San Luis Obispo anticipates from SCE for CCR REN energy efficiency programs. The County of San Luis Obispo will ensure that any changes in the CCR REN program delivery are reflected in these forecast updates.

This section is not applicable to SoCalREN as they do not possess the relevant data.

[10] TSB (Total System Benefit) is the sum of the benefit that program measures provide to the electric and natural gas systems.

OVERLAPPING SECTORS BY PORTFOLIO ADMINISTRATORS (PA)

Table 1: Areas of Potential Overlap, by Sector

Sector	SoCalREN	CCR REN	PG&E	SCE	SoCalGas
Residential	• Multifamily Program (SCR-RES-A1) • Residential Kits4Kids (SCR-RES-A4) • Small HTR Multifamily Direct Install (SCR-REs-A5)	Residential Equity Program (CCR-RES-001) • Green House Call Program	• PG&E Home Intel Program (NMEC) • PG&E ESA Program • Energy Savings Assistance – Northern Multi-Family Whole Building • California Energy-Smart Homes Program (CESHP) • PG&E On-Bill Financing (Nonresidential and multi-family only) • PG&E Empower My Home pilot (Res Equity) • GoGreen Financing[11] • PG&E Continuous Energy Feedback Program (CEFP) • PG&E Home Energy Checkup	• SCE ESA Program (SCE-13-ESA) • Home Energy Advisor (HEA) Program (SCE_Res_Equity_001) • Home Energy Advisor (HEA) Program (SCE_Res_Equity_002) • Disadvantaged Communities Marketing and Outreach (SCE-Res_Equity_003) • Customer Home Engagement for Energy Reduction – CHEER (SCE_3P_2025R_001) • Multifamily Residential Direct Install Program (SCE_3P_2024R_MF_001) • Residential Energy Solutions Program (SCE_3P_2025R_002) • Enervee Marketplace Program (SCE_3P_2020RCI_001)	• Residential Energy Efficiency Program - Resource acquisition (SCG 3702) • SoCalGas ESA Program • Energy Advisor Program (SCG 3701) • Sustainability Studio (SCG 3941) • Residential Energy Efficiency Program – Equity (SCG 3958) • Community Language Efficiency Outreach Program (SCG 3861) • Comprehensive Mobile Home Program (SCG 3884) • Multifamily Energy Alliance Program - Equity (SCG 3936) • Energy Alliance Program - Resource Acquisition (SCG3889)

[11] Go Green financing is a program offered by the State of California, supported by the IOUs available to all qualifying residential and small business customers. The program is operated by the California Alternative Energy and Advanced Transportation Financing Authority *(CAEATFA).* https://www.gogreenfinancing.com/

Sector	SoCalREN	CCR REN	PG&E	SCE	SoCalGas
					• Multifamily Whole Building Program - Equity (SCG 3705) • Whole Building Program - Resource Acquisition (SCG 3938) • Residential Advanced Clean Energy Program – Equity (SCG 3935) • Advanced Clean Energy Program - Resource Acquisition (SCG 3883) • Energy Advisor Program (SCG 3701) • Residential Behavioral Program (SCG 3824) • Marketplace (SCG 3829) • Residential Mobile Home Program (SCG 3885) • Retail Channel Support Program (SCG 3830) • TEG Wall Furnace Direct Install Program (SCG 3960) • Retail Partner Training Program (SCG 3830)

Sector	SoCalREN	CCR REN	PG&E	SCE	SoCalGas
Commercial	• Small Commercial Direct Install Program (SCR-COM-E1) • Food Desert Energy Efficiency Equity (FDEEE) Program (SCR-COM-E3) • Small & Medium Business Energy Advisor (SMBEA) (SCR-COM-E4)	Commercial Resource Acquisition Program (CCR-COM-001)	• Commercial Calculated Incentives Program (PGE21011) • Commercial Deemed Incentives Program (PGE21012) • NetOne (PGE_Com_003) • Advanced Energy Program for High Tech & Biotech (PGE_Com_004) • Healthcare Energy Fitness Initiative (PGE_Com_005) • Measured Savings for Summer Reliability (PGE_Com_006) • Simplified Savings Micro-Small Business Program (PGE_Com_SmallBiz) • California Energy Design Assistance All-Electric (PGE_SW_NC_NonRes_electric) • California Energy Design Assistance Mixed Fuel (PGE_SW_NC_NonRes_mixed)	• Simplified Savings (SCE_SMB_Equity_001) • Commercial Energy Efficiency Program (SCE_3P_2020RCI_005) • Commercial Energy Reduction Initiative (SCE_3P_2025C_001) • Comprehensive Refrigeration Energy Savings and Training (SCE_3P_2025C_002) • Grid-Responsive Incentive Design Market Access Program (GRID-MAP) (SCE_3P_2025MAP_001C) • Measured Savings Program (SCE_3P_2025MAP_002C) • Commercial Energy Manager Program (SCE_3P_SEM_001) • SPARKe Commercial SEM Program (SCE_3P_SEM_003)	• Nonresidential Calculated Incentive Program (SCG 3910) • Nonresidential Energy Advisor Program (SCG 3909) • Sustainability Studio (SCG 3941) • Commercial-BEST (SCG 3887) • Large Commercial Energy Efficiency Program (SCG 3892) • Service RCx Large Commercial Program (SCG 3891) • Small and Medium Commercial EE Program (SCG 3937) • Small and Medium Commercial EE Program (SCG 3882) • Strategic Energy Management (SCG 3939) • Commercial-BEST (SCG 3940) • Nonresidential Deemed Incentive Program (SCG 3911) • Nonresidential Behavioral Program (SCG 3898)

Sector	SoCalREN	CCR REN	PG&E	SCE	SoCalGas
					• Energy Efficiency and Rehabilitation Program (SCG3970)_ • Grid-Responsive Incentive Design Market Access Program (SCG3971)
Agricultural	• Agriculture Project Delivery Program (SCR-AGR-G1) • Rural-HTR Agricultural DI (SCR-AGR-G2) • Agriculture Retrofit (SCR-AGR-G3)	None	• Agricultural Deemed Incentives Program (PGE21032) • Agricultural Energy Advisor Program (PGE21034) • Agricultural Energy Savings Action Plan (AESAP) Program (PGE_Ag_001)	• Agriculture Energy Efficiency Program (SCE_3P_2021AGPUB_001) • Industrial and Agriculture Energy Manager Program (SCE_3P_SEM_002A) • SPARKe Industrial and Agricultural SEM Program - (SCE_3P_SEM_004A)	• Nonresidential Calculated Incentive Program (SCG3910) • Nonresidential Deemed Incentive Program (SCG3911) • Agricultural Energy Efficiency Program (SCG3890) • Nonresidential Energy Advisor Program (SCG3909)

Sector	SoCalREN	CCR REN	PG&E	SCE	SoCalGas
Public	• Energy Efficiency Project Delivery Program (SCR-PUBL-B1) • Distributed Energy Resource Disadvantaged Communities Program (SCR-PUBL-B2) • Streamlined Savings Pathway Program (SSP) (SCR-PUBL-B4) • Rural-HTR Public Agency Direct Install (SCR-	Public Equity Program (CCR-PUB-001) **Not offered in the Joint PAs territory**	• Government and K-12 (GK-12) Comprehensive Program (PGE_Pub_009) • Statewide State of California: Energy Strategy and Support Program (PGE_SW_IP_Gov)	• Public Energy Performance (SCE_3P_2021AGPUB_002) • Higher Education Efficiency Performance Program (SCE_SW_IP_Colleges) • Statewide Water Infrastructure and System Efficiency (SCE_SW_WP)	• Public Small/Medium Public Program (SCG 3886) • Large Public Program (SCG 3899) • Business Energy Efficiency Surveys (BEES) (SCG 3909) • Nonresidential Calculated Incentive Program (SCG 3910) • CC-Nonresidential Deemed Incentive Program (SCG 3911) • PUB-Regional Pathways (SCG-3912)

Sector	SoCalREN	CCR REN	PG&E	SCE	SoCalGas
	PUBL-B5) • Energy Resiliency Action Plan (SCR-PUBL-B6) • Regional Partner Initiatives (SCR-PUBL-B7) • Water & Wastewater Strategic Energy Management (SCR-PUBL-B8) • Underserved Schools Strategic Energy Management (SCR-PUBL-B9) • Water Infrastr				

Sector	SoCalREN	CCR REN	PG&E	SCE	SoCalGas
	ucture Program (SCR-PUBL-B10)				
Cross-cutting: WE&T	• ACES Pathway (SCR-WET-D2) • Green Path Careers (SCR-WET-D3) • WE&T Opportunity HUB (WE&T Opportunity HUB) (SCR-WET-D4)	Workforce, Education and Training Equity Program (CCR-WET-001) • Climate Careers Program	• WE&T Integrated Energy Education and Training (IEET) (PGE 21071) • WE&T Career Workforce Readiness (PGE_SW_WET_Work) • WET Career Connections (PGE_SW_WET_CC)		• Sustainability Studio (SCG3941) • WE&T-Integrated Energy Efficiency Training Program (IEET) (SCG 3729) • CC-Energy Program Outreach (SCG 3901) • WE&T-Educational Outreach Program (SCG 3764) • HERS Rater Training Program (SCG 3760))

Sector	SoCalREN	CCR REN	PG&E	SCE	SoCalGas
	• Agriculture WE&T (SCR-WET-D5) • E-Contractor Academy (SCR-WET-D6)				
Cross-cutting: C&S	N/A	Codes & Standards Program (CCR-C&S-001)	• Compliance Improvement (PGE21053) • Reach Codes (PGE21054)	• Compliance Improvement SCE-13-SW-008C • Reach Code SCE-13-SW-008D • Planning and Coordination SCE-13-SW-008E	N/A
Cross-cutting: Finance	• Public Agency Revolving Loan Fund (SCR-FIN-C1) • Rural-HTR Agriculture Finance Assistance Progra	Finance Equity Program (CCR-FIN-001)	• PG&E On-Bill Financing (PGE_OBFAP) • GoGreen Finaicing[12]	• On-Bill Financing (SCE-13-SW-007A) • New Finance Offerings (SCE-13-SW-007C)	On-Bill Finance (SCG 3735) Statewide New Finance Offerings (SCG3737)

[12] ibid

Sector	SoCalREN	CCR REN	PG&E	SCE	SoCalGas
	m (SCR-FIN-C3)				
Cross-cutting: Other		N/A	N/A	• Disadvantaged Communities & Marketing Outreach (SCE_Res_Equity_003) • Simplified Savings (SCE_SMB_Equity_001)	• Nonresidential Energy Advisor (Program) • Business Energy Efficiency Surveys (BEES) (SCG 3909) • Commercial – Savings By Design (SCG 3813) – closed to new commitments • CC-Nonresidential Calculated Incentives (SCG 3910) CC-Nonresidential Deemed Incentive Program (SCG 3911)

Statewide	• Statewide Commercial Midstream Water Heating • Statewide Upstream & Midstream Heating, • Statewide Heating Ventilation and Air Conditioning Program • Statewide Foodservice Instant Rebates Program • Statewide Plug Load Appliance Program • Statewide Water Infrastructure & System Efficiency (SW WISETM) Program • Statewide Home Energy Score

RESIDENTIAL SECTOR

CCR REN: Residential Equity Program (CCR-RES-01)

Implementer: Rising Sun Center for Opportunity

The Residential Equity program connects rural residential communities to energy efficiency opportunities through targeted outreach, education, and technical assistance focusing on equity-targeted hard-to-reach, disadvantaged, and low-income customer groups, including agriculture, hospitality, healthcare workers, and retirees who often face very high energy burdens in rural areas. The program aids rural and hard-to-reach communities in better understanding the concepts of energy conservation, energy efficiency, and demand response; connects customers to the opportunities for energy savings that might exist in their homes; and guides customers to other CCR REN programs as well as external programs and resources to support the implementation of energy projects, including the IOUs' income qualifying program, the Energy Savings Assistance (ESA) Program.

The Residential Equity program will conduct in-home energy audits by Climate Careers Energy Advisors; install no-cost measures by Climate Careers Energy Advisors and offer energy efficiency kits with no-cost energy efficiency measures for self-installation by residents. Additionally, program participants will be provided with an energy report that maps out actionable steps to deploy energy efficiency measures, suggest behavior changes and connect customers with other supporting programs, incentives, and financing offered by IOUs, third parties, and RENs in the shared territory.

The full program, including Green House Calls (in person and virtual kits) and Climate Careers (see WE&T section), will launch in the San Joaquin Valley region in 2025. Virtual do-it-yourself kits will launch in the High Sierra (Inyo and Mono counties) in 2027.

Table 1: Compliance with REN Program Criteria: Residential Equity Program

REN Criteria	CCR-RES-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	CCR REN's Residential Sector programs target disadvantaged, underserved and hard to reach residential customers living in rural areas. Not all PA programs, while open to these rural customers, do not focus on them or provide services tailored to their unique needs to address the barriers to energy efficiency that they face.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	
3. Activities in hard-to-reach markets, whether or not there is	CCR REN's Residential program will operate exclusively in hard to reach, disadvantaged and underserved communities.

another utility or CCA program that may overlap	

Marketing and Outreach to HTR Residential Customers:

CCR REN's Residential Equity program targets customers living in hard-to-reach rural areas, and/or disadvantaged and underserved communities which comprise the majority of CCR REN's service area. Specific marketing and outreach tactics will include:

- Program staff attending community events and handing out program information and signing up customers to receive program services
- Placing ads in local print media such as newspapers and bulletins
- Distributing flyers and collateral through local governments and merchants
- Messaging via local social media and other online outlets
- Grassroots outreach with door-to-door canvassing

SoCalREN Residential Programs

SoCalREN: Multifamily Program (SCR-RES-A1)

Implementer: ICF

The program targets large multifamily properties, offering technical and financial support for comprehensive energy retrofits. It reduces energy usage, resulting in lower utility costs for property owners and tenants. Additionally, it enhances property comfort and quality. Technical feasibility studies explore clean distributed generation and microgrids to further reduce GHG emissions and enhance resiliency.

Table 2: Compliance with REN Program Criteria: Residential –

REN Criteria	SoCalREN SCR-RES-A1
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	Program provides technical and financial support to reduce energy usage at the multifamily property through the completion of comprehensive retrofits. Other overlapping PAs may not offer this support.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is	N/A

another utility or CCA program that may overlap	

SoCalREN: Residential Kits4Kids (SCR-RES-A4)

Implementer: ICF

The Kits4Kids program provides energy-saving measures to families in the SoCalREN service area. Fourth-grade students attending eligible schools receive kits containing energy-saving measures and a basic efficiency curriculum. Families install the measures at home, generating energy savings and educating future household decision-makers on energy management practices. Upon successfully finishing this program, educators are awarded classroom incentive grants.

Table 3: Compliance with REN Program Criteria: Residential –

REN Criteria	SoCalREN SCR-RES-A4
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	Program provides energy-saving measures to families within the SoCalREN service area who have students attending schools that meet CPUC Hard to Reach criteria or are located within Disadvantaged Communities (DAC).

SoCalREN: Small HTR Multifamily Direct Install (SCR-RES-A5)

Implementer: ICF

SoCalREN's program targets independently owned "mom and pop" multifamily buildings. These underserved properties lack capital and expertise for complex energy retrofits. The turnkey Small Hard-to-Reach Multifamily program offers no-cost energy efficiency measures to tenants and owners. By using direct install delivery, it saves on electric, gas, and water bills while promoting energy-saving practices.

Table 4: Compliance with REN Program Criteria: Residential –

REN Criteria	SoCalREN SCR-RES-A5
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	This program complies with REN guidelines through its focus on hard-to-reach customers.

PG&E Residential Programs

PG&E: California Energy-Smart Homes Program (PGE_SW_NC_Res_electric)

Implementer: TRC

The statewide California Energy-Smart Homes All-Electric Residential Program (Energy-Smart Homes Program or CESHP) supports a high-level approach to achieving California's advanced energy efficiency policy goals by engaging with builders, developers and existing multi-family building owners, managers and contractors, to encourage them to build all-electric and recruit potential projects. The program is available to projects located in PG&E, SCE, and SDG&E electric utility territories. The program offers incentives for single-family, duplex, townhome, multi-family low-rise (three or fewer stories), accessory dwelling unit (ADU), and alteration projects. The objective of the program is to influence the decision and ease the transition to adopt all-electric new construction practices. To accomplish this, the program will educate potential participants and stakeholders on the features of all-electric homes, enroll projects, emphasize the installation of advanced energy efficiency measures, and facilitate future opportunities through non-incentivized, prerequisite measures that position homes to install high-impact demand response technologies more easily in the future. For more information visit caenergysmarthomes.com. The California Energy Design Assistance program, included in the Commercial programs section below, also offers support for multifamily buildings over three stories.

PG&E: Energy Savings Assistance – Northern Multi-Family Whole Building

Implementer: TRC

PG&E launched the new Energy Savings Assistance - Northern Multi-Family Whole Building (ESA - Northern MFWB) program in July 2023 to replace the ESA CAM. The Northern MFWB program provides whole-building upgrades, including resident units and common areas, to income-qualified properties.

The Northern MFWB program takes a holistic approach to engaging income-qualified multi-family stakeholders within PG&E's service territory, with end-to-end project support for property owners/representatives and tenants, and strategies that drive installation contractor and trade ally success. The program is accessible to both deed-restricted and non-deed restricted properties and features Single Point of Contact (SPOC) services that connect multi-family property owners and tenants with incentive-layering opportunities and financing resources to lower the barriers to participation. The Northern MFWB program strives to meet the cost-effectiveness guidelines and the ESA Program portfolio goals to achieve deep savings; the program design also considers opportunities to maximize "a building's demand response (DR) technologies, greenhouse gas (GHG) reduction, water energy nexus, and the health, comfort, and safety of tenants".

PG&E: Energy Savings Assistance

Implementer: RHA and Resource Innovations

PG&E's Energy Savings Assistance Program (ESA Program) provides energy efficiency services to income qualifying customers in single-family homes and mobile homes in the PG&E Territory, including the Bay Area. The objective of the ESA program is to reduce energy usage, while also increasing the health, comfort, and safety of participants. Households with income at or below 250% of the federal poverty line qualify.

PG&E Virtual Energy Audit Program – Home Intel Program (PGE_Res_001b)

Implementer: Home Energy Analytics (HEA)

PG&E offers a third-party P4P program in the Bay Area called HomeIntel (implemented by Home Energy Analytics). The Program offers free energy audits, education, and personal energy advisor services to residential customers in all PG&E counties. The Program offers customized recommendations for simple, no-cost, and low-cost changes to help customers reduce energy use and lower bills. Enrolled customers receive a monthly energy profile report.

PG&E Home Energy Checkup - (PGE_Res_002a)

Implementer: Oracle

The Home Energy Checkup (HEC) Program is a self-guided online assessment that helps customers understand where they use energy in their homes. It also provides energy-saving tips and suggestions based on the customer's specific responses and generates a simple checklist plan. The plan is saved on the customer's PG&E My Account website to track progress as items are completed.

PG&E Continuous Energy Feedback Program (PGE_Res_002d)

Implementer: Oracle

The Continuous Energy Feedback Program (CEFP) uses multiple behavior-based energy efficiency strategies to support our Residential and SMB customers in understanding and empowering them to manage and lower their household/business energy consumption. This program uses information and customer engagement strategies to prompt non-rebated behavior change that can be measured using randomized controlled trials to validate savings and demonstrate attribution. As a result of their changed behaviors, customers can manage their energy use and energy behaviors, make more efficient purchasing decisions, and take energy-related actions to lower their energy use.

PG&E: Residential Equity Pilot – Empower My Home (PGE_Res_Equity)

Implementer: Resource Innovations

Empower My Home is a pilot initiative aimed at accelerating full and partial building electrification for disadvantaged communities, low-income, and hard-to-reach residential customers. The program covers 100% of the project costs for qualifying customers (up to 250% FPG[13]), including upgrades such as induction stoves, heat pumps, water heaters, insulation, duct sealing, and electrical panel upgrades. It initially targets eligible customers in Oakland, and San Francisco, then Fresno and Stockton in later phasing.

SCE Residential Programs

SCE administers seven different residential sector programs. Residential direct install programs are offered to Single-Family[5], Multifamily, and Manufactured/Mobile homes. The Energy Advisor Program and the Marketplace program offer online tools, surveys and energy saving strategies to customers. These six programs serve our Hard to Reach (HTR) and Disadvantaged Community customers. The last program is new construction where builders are incentivized for helping to achieve our statewide initiatives with energy demand reductions and greenhouse gas (GHG) savings across our territory.

SCE: Energy Savings Assistance (SCE-13-ESA)

Implementer: SCE

SCE's Energy Savings Assistance (ESA) Program provides energy efficiency services to income qualifying customers in single-family homes and mobile homes in the SCE Territory. The objective of the ESA program is to reduce energy usage, while also increasing the health, comfort, and safety of participants. Households with income at or below 250% of the federal poverty line qualify. The Energy Savings Assistance (ESA) program offers income-qualified homeowners and renters the opportunity to receive energy-saving home improvements, such as a heat pump water heater replacement, or energy-efficient appliances, such as a new refrigerator, clothes washer, or dishwasher replacement, and more. For qualified customers, the cost is covered, including installation by an authorized contractor.

SCE: Multifamily Residential Direct Install Program (SCE_3P_2024R_MF_001)

Implementer: Synergy Companies

The Multifamily Residential Direct Install (MFRDI) Program provides direct installation of comprehensive EE measures to Residential Multifamily customers and common areas at no cost. The Program targets specific geographic areas to alleviate energy hardship and electrical system constraints, and to assist lower- to medium-income populations not eligible for income

[13] U.S. Federal Poverty Guidelines

assistance programs. The program enhances EE knowledge and program participation within the Multifamily market segment to motivate them to undertake deeper EE activities and retrofits.

SCE: Energy Advisor (SCE_Res_Equity_001 and SCE_Res_Equity_002)

Implementer: CLEAResult

The Residential Energy Advisor (REA) programs are equity-focused initiatives designed to support the California Public Utilities Commission's Environmental and Social Justice (ESJ) Action Plan 2.0 by promoting clean energy investments, improving air quality and public health, enhancing climate resilience, and fostering economic opportunities in ESJ communities. These programs target hard-to-reach (HTR) residential customers, including moderate-income households, renters, and those in disadvantaged communities (DACs), through both non-resource and resource contracts. Non-resource efforts include in-home education, Energy Advisor services, and community outreach, while resource efforts focus on building a Trade Ally Network, marketing, and providing incentives for energy efficiency (EE) upgrades. Free Home Energy Assessments will identify EE opportunities, and coordinated marketing and partnerships with community organizations will drive engagement and adoption of EE measures. The program also leverages existing initiatives like Comfortably CA, Golden State Rebates, and TECH to expand its reach and effectiveness.

SCE: Disadvantaged Communities Marketing and Outreach Non-Resource Program (SCE_Res_Equity_003)

Implementer: Global Energy Services (GES), Inc.

The Disadvantaged Communities Marketing and Outreach (DACMO) Program is designed to increase participation in energy efficiency (EE), demand response (DR), and electrification programs among underserved, hard-to-reach (HTR), and disadvantaged communities (DACs). It addresses barriers such as language and financial limitations by offering multilingual support, targeted advertising through local media, a toll-free hotline, a multilingual website, and active community engagement through events and partnerships with local governments. DACMO raises awareness and encourages participation by delivering program information directly to residents via outreach events, door hangers, social media, and radio ads, and promotes free Home Energy Advisements (HEAs) that offer personalized energy-saving recommendations.

SCE: Customer Home Engagement for Energy Reduction Program (SCE_3P_2025R_001)

Implementer: Oracle

The Customer Home Engagement for Energy Reduction (CHEER) program expands Southern California Edison's Home Energy Reports (HERs) initiative to reach up to 2.3 million residential households, focusing on high energy users and priority groups such as Hard-to-Reach (HTR) and Disadvantaged Communities (DACs). While all current HER recipients remain in the program, new participants are selected based on cost-effectiveness, eligibility criteria, and the need to maintain control groups for evaluation. CHEER aims to maximize Total System Benefit (TSB) savings, improve customer satisfaction, and promote equity by using opt-out enrollment, digital tools for energy management feedback, and targeted outreach to low-income customers already engaged with HERs.

SCE: Residential Energy Solutions Program (SCE_3P_2025R_002)

Implementer: Synergy Companies

The Residential Energy Solutions (RES) Program offers no-cost direct installation of energy efficiency measures for single-family and manufactured housing customers, focusing on lower- to medium-income households not eligible for income assistance. Targeting specific geographic areas to reduce energy hardship and system constraints, the program promotes deeper energy retrofits and energy efficiency awareness. It achieves cost-effectiveness through high Total System Benefit (TSB) and Total Resource Cost (TRC) measures approved by the CPUC and supports clean energy by reducing greenhouse gas emissions. RES also integrates demand-side management by installing smart thermostats and facilitating enrollment in SCE's Smart Energy Program. Electrification is supported through direct installs and financial bridging options like HEEHRA rebates via TECH Clean California. The program prioritizes customers in DACs, HTR areas, rural regions, and specific climate zones, and adheres to strict data accuracy and documentation standards while coordinating with other utility and water agency programs.

SCE: Marketplace Program (SCE_3P_2020RCI_001)

Implementer: Enervee

The Marketplace program delivers an innovative "online market" experience used to drive SCE residential customers to purchase more energy efficiency consumer products. This program employs online technology solutions designed to increase their shopping experience, moving customers towards more energy efficiency choices. In addition, this program directs customers to low-interest Eco Financing (GoGreen[5]) as well as many different cost saving efficiency products at best retail price. This program is open to all single, multi and mobile home SCE customers including Hard to Reach (HTR) and Disadvantaged Community customers. The only qualifications needed for this program is that customers are able to access the internet and have up-to-date browser software protocol.

SoCalGas Residential Programs

The Residential energy efficiency sector programs offer and promote both specific and comprehensive energy solutions for residential customers. By encouraging adoption of economically viable energy efficiency technologies, practices, and services, these programs employ strategies and tactics to overcome market barriers while delivering services that support the CPUC's Strategic Plan and the Energy Efficiency Business Plan. SoCalGas's Residential Energy Efficiency Programs focus is to:

- Facilitate, sustain, and transform the long-term delivery and adoption of energy-efficient products and services for single and multi-family dwellings;
- Cultivate, promote, and sustain lasting energy-efficient behaviors by residential customers through a collaborative statewide education and outreach mechanism; and
- Meet customers' energy efficiency adoption preferences through a range of offerings including single-measure incentives and more comprehensive approaches.

SCG: Energy Savings Assistance

Implementer: RHA

The SoCalGas Energy Savings Assistance (ESA) Program provides energy efficiency services to income qualifying customers in single-family homes and mobile homes in the SoCalGas Territory. The objective of the ESA program is to reduce energy usage, while also increasing the health, comfort, and safety of participants. Households with income at or below 250% of the federal poverty line qualify.

SCG 3701: RES-Energy Advisor Program

This program continues to help customers understand and empower them to manage their energy use, and will guide them, where appropriate, towards advancing customers to energy efficiency solutions. This includes online short surveys, online full audits, tailored energy efficiency solutions, programs, and tips through SoCalGas' Ways to Save tools.

SCG 3702: RES-Residential Energy Efficiency Program

The Residential Energy Efficiency Program (REEP) is a deemed, downstream equipment/product rebate program that offers incentives for the purchase and installation of the most energy efficient, natural gas equipment. The Home Energy Efficiency Rebate Program (HEER) component of REEP offers single family residential customers energy efficiency rebate incentives that encourages and aids customers to make energy efficient choices when purchasing appliances. The Multifamily Energy Efficiency Rebates Program (MFEER) component of REEP encourages multifamily property owners and managers to make energy efficient improvements when upgrading their properties. The Energy Efficient New Homes Program (EENH) component of REEP delivers EE solutions to residential new construction and encourages the use of EE equipment to improve the homes energy savings over the requirements of CA Title 24.

SCG 3705: RES-Multifamily Whole Building Program (Equity)

This Equity Multifamily Whole Building Program aims to deliver comprehensive EE upgrades tailored to the needs of existing multifamily dwellings and their owners, tenants and management companies. The Program seeks to promote long- term energy benefits through comprehensive whole building energy efficiency retrofit measures including building shell upgrades, high-efficiency HVAC units, central heating and cooling systems, central domestic hot water heating and other deep energy reduction opportunities. These EE measures would be identified through an investment grade assessment. The Program will coordinate with the ESA Program and other energy efficiency programs to present a singular and streamlined approach for multifamily tenants, property owners and property managers.

SCG 3824: RES-Residential Behavioral Program

This program offers behavior intervention strategies to residential participants to achieve short-term energy and budget savings that can persist and produce long-term behavior change and energy savings. This is achieved by fostering participant engagement, ensuring participant satisfaction, and providing energy education and upgrades through regular and participant-specific touchpoints in the form of Home Energy Reports (HERs) and a web-based education portal.

SCG 3829: RES-Marketplace

The Marketplace program is an online marketplace platform which provides energy efficiency information as well as utility program information to customers. The platform also provides rebates at point-of-purchase and provides micro-loan financing options for customers as well.

SCG 3830: Retail Channel Support Program

The Program will engage targeted retailers and distributors within Company territory to raise awareness and increase understanding of Company EE programs and the rebates available for natural gas appliances. The Program will engage retailer and distributor sales associates and educate them on Company program offerings, energy-efficient natural gas product features and benefits, rebate application process, and sales tips to help drive the sales of products promoted and incentivized by Company. The Program will develop point-of-purchase (POP) and other marketing materials and be placed in the store to help educate consumers on the features and benefits of efficient appliances and available rebates.

SCG 3861: RES-Community Language Efficiency Outreach Program

The program provides residential in-language, marketing, education and outreach and direct install of residential more efficient energy efficiency measures, targeting the HTR/DAC Chinese, Vietnamese, Korean, Hispanic and other ethnic communities of Los Angeles and Orange Counties.

SCG 3883: RES-Residential Advanced Clean Energy Program (Resource Acquisition)

The program is a comprehensive advanced clean energy solution for single family customers. The advanced clean energy path begins with the delivery of cost-effective therm-rich direct install measures that transitions to an advanced clean energy opportunity for the single family customer that can be financed by outside sources. The program is designed with potential to be replicated across residential segments and seeks to be transformational rather than transactional. It will transform the customer into a wiser and knowledgeable steward by instilling behavior to improve their home by reducing carbon footprint and enjoying increased comfort. The program leverages IOU electric, municipal electric, and local agency clean energy single family opportunities offerings, in addition to natural gas clean energy solutions.

SCG 3884: RES-Comprehensive Mobile Home Program

The program is a comprehensive advanced clean energy solution for manufactured home customers that reside in Ventura, Los Angeles, Orange, Riverside, San Bernardino, and Imperial Counties. The program strategy encourages deeper energy savings by offering more comprehensive energy efficiency measures. The program path begins with the delivery of cost-effective therm-rich direct install measures that transition to an advanced clean energy opportunity for the manufactured homes customers that can be financed by outside sources. The program delivers natural gas energy efficiency, clean energy, and carbon emission solutions.

SCG 3885: RES-Residential Mobile Home Program

This program will allow for mobile and manufactured home residents to overcome the historical barriers to energy efficiency by providing access to affordable and no-cost pre-qualified installation and quality retrofits that maximize energy savings at each site by using proven products and technologies. The program further facilitates energy improvements by providing the customer with a package of services through one point of contact. This program also promotes local economic development by employing local staff and helping customers lower their gas bills. The program provides customers with further information on other low-cost and no-cost energy efficiency measures, demand side and other programs that are relevant to customer needs for saving energy.

SCG 3889: RES-Multifamily Energy Alliance Program (Resource Acquisition)

The program provides broad outreach and customer screening services for the full suite of SoCalGas Multifamily offerings, and also provides a limited set of measures—both rebated and no-cost direct install—to offer customers who do not qualify for the Energy Savings Assistance Program for Common Area Measures or who are not yet ready to complete larger-scale upgrades through the Multifamily Whole Building program. Using a one-stop-shop approach to working with the multifamily property owner/manager customer segment, the program drives interest in EE upgrades, directs customers to the appropriate program, and provides ongoing outreach and education that encourages customers to continue their energy efficiency journey with SoCalGas through additional program participation options. The program will seek to achieve at least 50 percent participation by HTR and DAC.

SCG 3935: RES-Residential Advanced Clean Energy Program (Equity)

The Equity program is a comprehensive advanced clean energy solution for single family customers. The advanced clean energy path begins with the delivery of cost-effective therm-rich direct install measures that transitions to an advanced clean energy opportunity for the single-family customer that can be financed by outside sources. The program is designed with potential to be replicated across residential segments and seeks to be transformational rather than transactional. It will transform the customer into a wiser and knowledgeable steward by instilling behavior to improve their home by reducing carbon footprint and enjoying increased comfort. The program leverages IOU electric, municipal electric, and local agency clean energy single family opportunities offerings, in addition to natural gas clean energy solutions.

SCG 3936: RES-Multifamily Energy Alliance Program (Equity)

This equity program provides outreach and customer screening services for other SoCalGas Multifamily offerings and also provides a limited set of measures to customers who do not qualify for the ESA Program for Common Area Measures or who are not yet ready to complete larger-scale upgrades through the Multifamily Whole Building program. Using a one-stop-shop approach to working with the multifamily property owner/manager customer segment, the program drives interest in energy efficiency upgrades, direct customers to the appropriate program, and provide ongoing outreach and education that encourages customers to continue their energy efficiency journey with SoCalGas through additional program participation options. The program will seek to achieve at least 50 percent participation by HTR and DAC properties/owners.

SCG 3938: RES-Multifamily Whole Building Program (Resource Acquisition)

The program delivers comprehensive EE upgrades tailored to the needs of existing multifamily dwellings and their owners, tenants and management companies. The Program seeks to promote long-term energy benefits through comprehensive whole building energy efficiency retrofit measures including building shell upgrades, high-efficiency HVAC units, central heating and cooling systems, central domestic hot water heating and other deep energy reduction opportunities. These energy efficiency measures would be identified through an investment grade assessment. The Program will coordinate with the ESA Program and other energy efficiency programs to present a singular and streamlined approach for multifamily tenants, property owners and property managers.

SCG 3958: Res Energy Efficiency Program (Equity)

The Residential Energy Efficiency program (REEP) is a deemed, downstream equipment/product rebate program that offers incentives for the purchase and installation of the most energy efficient, natural gas equipment in the equity space. The Home Energy Efficiency Rebate Program (HEER) component of REEP offers single family residential customers energy efficiency rebate incentives that encourages and aids customers to make energy efficient choices when purchasing appliances. The Multifamily Energy Efficiency Rebates Program (MFEER) component of REEP encourages multifamily property owners and managers to make energy efficient improvements when upgrading their properties. The Energy Efficient New Homes Program (EENH) component of REEP delivers EE solutions to for residential new construction and encourages the use of EE equipment to improve the homes energy savings over the requirements of CA Title 24.

SCG3960: RES-TEG Wall Furnace Direct Install Program

The Thermoelectric Generation (TEG) Wall Furnace Direct Install Program (Program) provides a no cost installation of legacy, low-efficiency wall furnaces with TEG high-efficiency, low-emission modulating gas wall furnaces (Model TG2030TN). The program implementer, Williams Furnace Company (Williams), will directly deliver the energy-efficient, low-emission TEG wall furnace through a participating wholesaler to trained technicians who will directly install it for the residential customer.

Residential Coordination

For its residential programs, the Joint PAs will engage in regular communication through email and meetings to plan, review and improve coordination processes to ensure the most effective possible coordination is occurring. Meetings may include discussions on customer choice, marketing, and double dipping prevention. The Joint PAs will develop a protocol to verify customer eligibility between possibly overlapping programs to prevent “double dipping.” This will require the data requestor (i.e., implementer) to complete an in-depth security review and data sharing agreements among implementers/RENs and IOUs to ensure customer data is protected. To ensure that Joint PAs are aware of other potentially overlapping programs and resources, each PA will provide written notice of any new program in the form of notice sent to the R.25-04-010 service list when filing a Tier 2 Advice letter to the R.25-04-010 service list, as well as an invitation to the public webinar for all stakeholders. Changes or updates to programs will also be communicated via regularly scheduled program coordination meetings between joint PAs. Coordination with the IOUs’ ESA programs will be a standing agenda item in all residential coordination meetings and discussions.

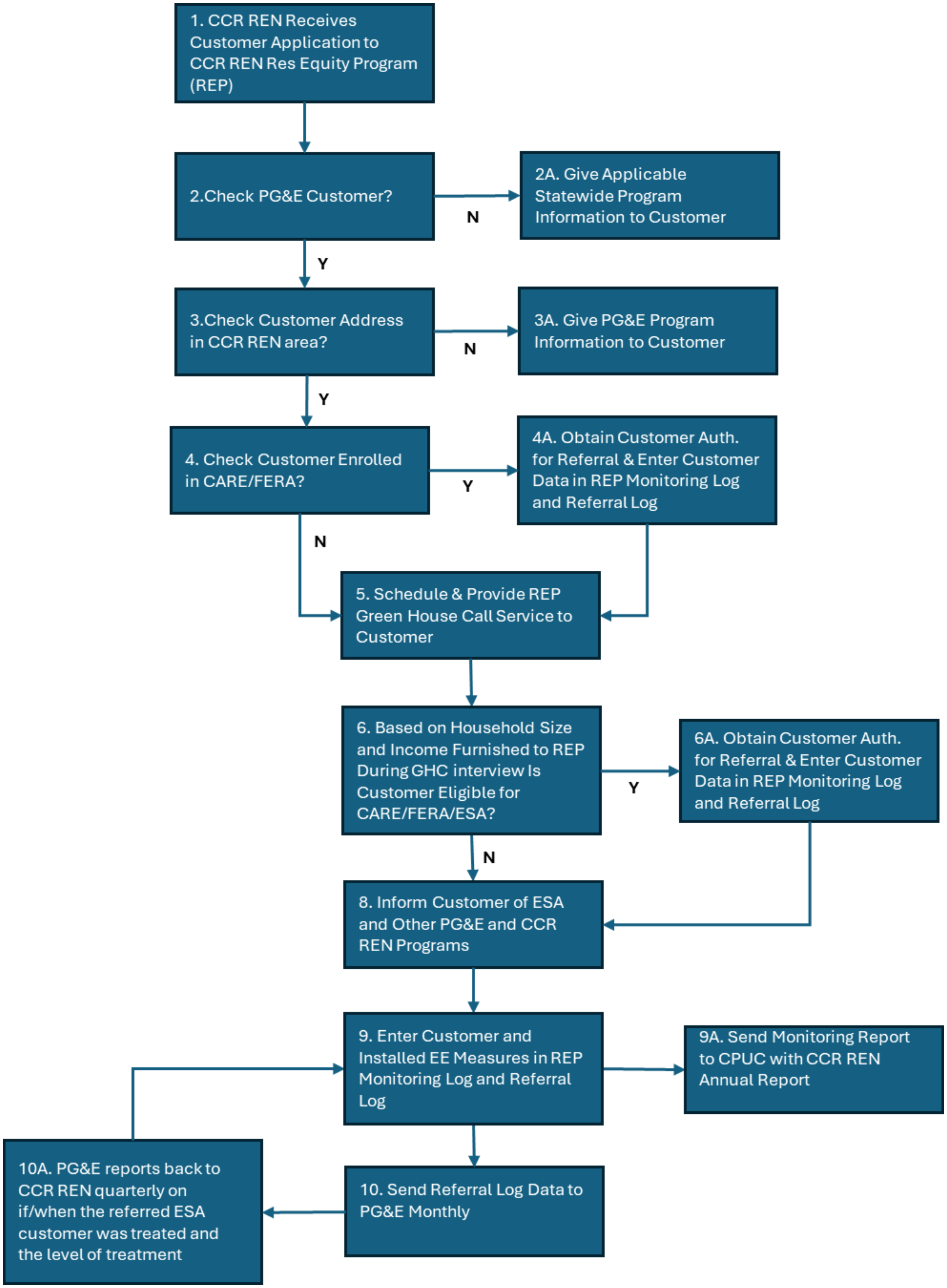
To ensure that customers are aware of others' programs, where that administrator does not have a similar offering, Joint PAs will conduct regular meetings to develop and employ coordination practices to ensure that there are protocols for customer handoff should any PA identify an opportunity for another's program. Joint PAs will ensure the customer hand off to the recommended party will occur while the customer is engaged by email/phone to ensure a seamless service experience for the customer between joint PAs' programs. CCR REN and the IOUs' ESA program are actively exploring partnership opportunities and are enthusiastic about bridging and layering our programs to better serve hard-to-reach customers. We will further explore these opportunities during the next JCM review.

CCR REN RES and IOU ESA Program Joint Coordination

In compliance with Resolution E-5400[14] CCR REN and the IOUs are working together to explore and develop an innovative collaboration process in which CCR REN would install certain ESA-eligible measures in ESA-eligible customer homes and IOUs would reimburse CCR REN for their cost and would claim the energy savings in their ESA program. In the interim while the above process is being developed and analyzed for feasibility, CCR REN has developed a proposed interim coordination procedure, described in detail below. The Decision Tree corresponding to this proposed coordination procedure is included as Figure 1.

[14] CPUC Energy Division Resolution E-5400 dated August 28, 2025, Revised 2024-27 energy efficiency portfolio business plans for Northern California Rural Regional Energy Network and Central California Rural Regional Energy Network

Figure 1: CCR REN RES Equity and PG&E ESA Program Coordination Decision Tree



Description of Coordination and Referral Procedure

Step 1: CCR REN conducts outreach to hard to reach, disadvantaged and underserved customers and enrolls a customer in CCR REN’s RES Equity Program (REP)

Step 2: CCR REN checks whether the customer is an IOU customer.

Step 2A: If customer is not an IOU customer, they are not eligible for CCR REN’s REP program. CCR REN will provide information on statewide programs that customer may be eligible for.

Step 3: If the customer is an IOU customer, CCR REN then checks that the customer address is within CCR REN’s service area.

Step 3A: If the customer is not within CCR REN’s service area, the customer is provided information about IOU programs.

Step 4: CCR REN checks the IOU customer data if customer is enrolled in CARE/FERA. If the customer is not enrolled in CARE/FERA, then proceed to Step 5.

Step 4.A.: If customer is enrolled in CARE/FERA CCR REN obtains customer’s authorization to make a referral to IOUs’ ESA program and enters this customer’s information in the REP Monitoring Log and Referral Log and proceeds to Step 5.

Step 5.: CCR REN schedules an appointment and provides REP services and measures in the customer home, including a walk-through energy survey and briefing with the customer, and installation of appropriate energy efficiency measures. All services are provided at no cost to the customer. To prevent any duplication of measure installation, existing measures in the home are verified by REP and if an efficient option is found to be already installed and operation, the equivalent REP measure is not installed by REP. For example, a new LED lamp is only installed by REP if the existing lamp is incandescent or fluorescent. REP will not replace an energy efficient measure found to already exist in the home.

Step 6.: CCR REN conducts an interview with the customer while at the customer home and based on customer-provided household size and income determines whether customer may be eligible for CARE/FERA/ESA. If yes, then proceed to Step 6.A. If no, proceed to Step 7.

Step 6.A.: CCR REN obtains customer authorization for referral and enters customer’s information in the REP Monitoring Log and Referral Log and proceed to Step 7.

Step 7.: CCR REN informs customer of ESA and other IOU and CCR REN programs that customer may be eligible for.

Step 8.: CCR REN enters customer information and installed EE measures in REP Monitoring Log and Referral Log.

Step 8.A.: CCR REN sends Monitoring Report to CPUC with CCR REN Annual Report.

Step 9.: CCR REN sends Referral Log data to IOU monthly

Step 9.A.: IOU reports back to CCR REN quarterly with information about if/when the referred customer was treated and level of treatment. CCR REN incorporates this information in the Annual Monitoring Report to the CPUC.

COMMERCIAL SECTOR

CCR REN Commercial Energy Improvement Program (CEIP)

The CCR REN CEIP offering will help foster and grow a market for energy efficiency and electrification services for commercial customers, with a focus on serving those that are located in disadvantaged or underserved communities, are hard-to reach, and/or are struggling to afford energy costs. The program offerings will be tailored to the customer and will include a combination of resource and equity measures provided at no cost to customers in hard-to-reach markets. To maintain cost effectiveness while supporting energy affordability for customers, CCR REN will deploy an innovative program that focuses on creating transformative outcomes for customers such as small businesses that otherwise would not be able to consider electrifying or retrofitting their equipment.

The CCR REN CEIP will leverage Partner Organization relationships with local Community Based Organizations (CBOs) for direct outreach to potential customers. The primary marketing approach will be through the Partner Organizations, in collaboration with CBOs and supplemented with more traditional tactics, resulting in future referrals within local communities and creating a sustainable channel for ongoing customer acquisition. Sharing and showcasing the positive outcomes from program participants is a key strategy to drive both program interest, and more broadly, an interest in energy efficient technologies and electrification pathways. This will lead to optimal outcomes for commercial customers located in the Eastern Sierra, Monterey Bay, and San Joaquin Valley regions of the Central California Rural REN.

In alignment with CCR REN's mission of increasing new employment opportunities that benefit future generations and assist in building community wealth for hard-to-reach/rural communities, CCR REN Partner Organizations will work with the program consultant to recruit and train 12 Clean Energy Advisors by integrating a hands-on learning Clean Energy Academy into this program. The Clean Energy Academy consists of a repertoire of over 50 successfully designed and delivered workforce development and contractor training courses that will be tailored into a specific CCR REN curriculum. The clean energy academy curriculum, and the hands-on experience, will give the 12 Clean Energy Advisors the skills they need to enter the energy efficiency and electrification industry in the communities where they live.

CCR REN: CEIP (CCR-COM-001)

Table 5: Compliance with REN Program Criteria: CEIP

REN Criteria	CRR-COM-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	CCR-COM-001 will provide turn-key Direct Install services to 100% hard-to-reach commercial customers in CCR REN territory. Prior to services being provided, each potential participant will be

	qualified as HTR. Once qualified for the program, the HTR participant will be guided through the direct install process by an assigned Clean Energy Advisor (CEAs). CEAs will be hired in-community and will be given the workforce training and education opportunities needed to advance a career in energy efficiency. The program will prioritize Resource Acquisition in HTR communities while promoting equity and workforce development.

Marketing and Outreach to HTR Residential Customers: CCR REN's marketing and outreach is specifically designed to target only hard-to-reach commercial customers by:

1. Prioritizing geographic hard-to-reach and disadvantaged communities
2. Narrowing outreach to businesses with a high probability of renting or leasing
3. Assessing business size with available data to limit outreach to those with a high probability of having less than 25 employees
4. Serving small businesses that are unlikely to exceed energy use thresholds
5. Where possible, work in census tracts where there are high percentages of households with a primary language other than English.

CRR REN's program outreach focuses on in-community, door-to-door outreach. Potential participants attest to qualifying as hard-to-reach as prequalification to service. CCR REN's approach to targeting and outreach relies on hard-to-reach criteria. For example, CCR REN's rural context lends to a high degree of certainty that potential participants meet the geographic criteria. In those cases, only one additional HTR criterion is needed such as renting or leasing. All participants will have signed attestations that they qualify as HTR.

SoCalREN Commercial Programs

SoCalREN: Small Commercial Direct Install Program (SCR-COM-E1)

The SoCalREN DI Program bridges energy-saving gaps for small, hard-to-reach commercial customers. While larger facilities benefit from rebates, smaller businesses face exclusion due to low energy savings opportunities and strict criteria. SoCalREN's program provides streamlined, no-cost energy efficiency measures, empowering underserved businesses to overcome barriers and achieve clean, secure, and affordable energy futures.

Table 6: Compliance with REN Program Criteria: Commercial

REN Criteria	SoCalREN SCR-COM-E1
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A

3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	The IOUs are not serving this target customer group (HTR business customers) with targeted measure solutions, so this program will fill a gap in the market.

SoCalREN: Food Desert Energy Efficiency Equity (FDEEE) Program (SCR-COM-E3)

The FDEEE program supports corner stores and small businesses in food deserts across SoCalREN. By providing healthy food options and energy-efficient refrigerators, store owners save on utility bills while promoting fresh food in low-income communities. FDEEE educates and empowers underserved populations to participate in energy-efficient practices and access healthy foods.

Table 7: Compliance with REN Program Criteria: Commercial

REN Criteria	SoCalREN SCR-COM-E3
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	Other PAs are not serving this target customer group (HTR business customers) with targeted measure solutions, so this program will fill a gap in the market.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

SoCalREN: Small & Medium Business Energy Advisor (SMBEA) (SCR-COM-E4)

The SMB Program enhances energy awareness for small and medium-sized businesses (SMBs). It provides an overview of eligible SoCalREN commercial programs, acts as a primary market entry point, and coordinates program services. Services include project management, financial planning, and analysis for energy efficiency projects, along with support for loan applications.

Table 8: Compliance with REN Program Criteria: Commercial

REN Criteria	SoCalREN SCR-COM-E4
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	There are currently no existing programs in the market offering hands-on services to educate business owners about energy costs, the value of efficiency, and support applications for financing products in the marketplace.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A

3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

PG&E Commercial Programs

PG&E's Commercial EE programs offer non-residential customers a suite of approaches, products, and services to help overcome the market barriers to optimizing energy management. These programs offer comprehensive energy management solutions, which may include EE, as well as IDSM, through strategic energy planning support, technical support services such as facility audits and calculation or design assistance, and financial support through rebates, incentives, and financing.

PG&E: Commercial Deemed Incentives Program (PGE-21012)

The Commercial Deemed Incentives program offers a limited number of prescriptive rebates directly to customers, vendors, or distributors for the installation or sale of energy efficient equipment. These measures reach across technology segments including agriculture, HVAC, refrigeration, and water heating, where there is not overlap with Statewide programs. While reduced, the prescriptive rebate approach continues to fill gaps in other programs and remains an attractive option for smaller projects.

PG&E: California Energy Design Assistance All-Electric (CEDAE) Program

Implementer: Willdan

The statewide CEDAE program serves commercial, public, high-rise multifamily residential, industrial, and agricultural new construction sectors, and major alterations facilities across the PG&E, SCE, and SDG&E territories. This program contributes to the IOUs' efforts to achieve their share of California's ambitious energy efficiency (EE), greenhouse gas reductions, and meet electrification goals by offering EE options tailored to each building during the design and construction process. CEDAE also offers technical assistance early in the process when it has the greatest influence on design and operation, driving energy savings beyond code and gathering data to further advance future codes. The CEDAE program enrolls and influences the non-residential new construction market to achieve deeper energy savings and decarbonization goals through key activities such as customer incentives, outreach and education, real-time energy modeling, verification, Integrated Demand Side Management (IDSM) support and data tracking to inform future codes and standards. For more information, visit California Energy Design Assistance (willdan.com).

PG&E: California Energy Design Assistance Mixed Fuel (CEDAM) Program) (PGE_SW_NC_NonRes_mixed)

Implementer: Willdan

The CEDAM program serves commercial, public, high-rise multifamily, industrial, and agricultural new construction sectors, and major alterations facilities across the PG&E, SCE, SoCalGas, and SDG&E territories. CEDAM contributes to the IOUs' efforts to achieve their share of California's ambitious energy efficiency (EE), greenhouse gas reduction, and electrification goals by offering technical assistance early in the process when it has the greatest influence on design and operation, driving energy savings beyond code and gathers data to further advance future codes. The CEDAM program will enroll and influence the non-residential new construction market to achieve deeper energy savings and decarbonize through key activities such as customer incentives, outreach and education, real-time energy modeling, verification, IDSM support and data tracking to inform future codes and standards. For more information, visit California Energy Design Assistance (willdan.com).

PG&E: Commercial Calculated Program (PGE-21011)

PG&E implements the Commercial Calculated Incentives program. Currently in the ramp-down process, this program is focused on meeting existing customer commitments and is closed to new applications. The program has provided financial incentives for non-residential customers to retrofit equipment or systems that exceed applicable code and/or industry standards in existing buildings. Its mission has been to offer financial and technical assistance for customers to undertake retro-commissioning (RCx) projects and implement measures that improve facility operations. These elements of service have been built into third-party programs which address most customer circumstances.

PG&E: Commercial Energy Advisor Program (PGE-21014)

The Commercial Energy Advisor program provides customer education and encourages participation in EE, DR, self-generation programs and promotes awareness of GHG and water conservation activities. The program provides energy savings opportunities and continuous improvement over time by supporting online self-service tools, such as Business Energy Checkup[15]. Through Business Energy Checkup, customers receive rate analysis, check their bills, and receive tips and tricks for saving energy. Aligning integrated improvement opportunities with customers' needs, the Energy Advisor Program also increases program participation and adoption rates by helping customers to better understand EE benefits.

PG&E: NetOne Commercial Program (PGE_Com_003)

Implementer: Ecology Action

The NetOne Commercial Efficiency Program is a downstream program that provides energy efficiency services, technical services, and incentive processing. Primarily serving the commercial real estate, hospitality, grocery and retail markets, NetOne provides a suite of incentives to commercial customers to install refrigeration, HVAC, lighting, and meter-based energy savings using the Deemed, Custom, and NMEC platforms. The program also offers On Bill Financing to promote customer participation. The broad offering also puts NetOne in the position of accepting project types and sizes from a wide variety of market segments.

[15] Business Energy Checkup is located within the pge.com/myaccount website for customers to perform a Facility Audit, read about recommendations on energy use, and explore rate options.

PG&E: Advanced Energy Program for High Tech and Biotechnology (PGE_Com_004)

Implementer: Resource Innovations

The Advanced Energy Program is a customer-centric demand side management (DSM) program offering tailored solutions for high-tech and biotech (HTBT) customers.

The program focuses on identifying and implementing energy efficiency opportunities in the unique HTBT sector, with facility types ranging from multi-site campus retrofits to laboratory, clean room, and data center upgrades. Additionally, the program offers extensive guidance on control upgrades, and retro-commissioning (RCx) to optimize existing equipment, scheduling, and control sequences while shifting demand away from local and system peak periods.

The Advanced Energy Program targets medium to large high-tech and bio-tech facilities but is available to smaller customers in the sector as well. Typical projects have ranged from 10,000 sq. ft of small offices to millions of sq. ft across high-tech and bio-tech campus facilities. Annual electric consumption from customer projects has ranged from several hundred thousand kWh to tens of millions of kWh. The program has typically been a building controls-centric program with HVAC systems as its primary technology focus. This program has primarily leveraged the customized incentive process but provides support for Deemed and NMEC projects, as well as assistance with PG&E's On-Bill Financing on an as-needed basis with customers.

PG&E: Healthcare Energy Fitness Initiative (PGE_Com_005)

Implementer: Resource Innovations

The Healthcare Energy Fitness Initiative (HEFI) is a customer-centric demand side management (DSM) program that offers tailored solutions for PG&E’s healthcare customers including public or private inpatient (hospital), outpatient (clinics), and residential living facilities. HEFI focuses on the highest potential end uses in the healthcare segment, including HVAC retrofits, controls, and optimization – including central heating, cooling, and steam plants; lighting fixtures and advanced lighting controls; process and equipment loads, refrigeration, and plug loads.

The Healthcare Energy Fitness Initiative program targets medical facilities primarily for medium and large customers but is available to smaller customers in the sector as well. Typical projects have ranged from small medical office building spaces with lighting upgrades to multi-year central plant replacement efforts. This is a building controls-centric program with HVAC systems as its primary technology focus. This program has primarily leveraged the customized incentive process but provides support for Deemed and NMEC projects, as well as assistance with PG&E's On-Bill Financing on an as-needed basis with customers.

PG&&E: Measured Savings for Summer Reliability (PGE_Com_006)

Implementer: Alternative Energy Systems Company (AESC)

The Measured Savings for Summer Reliability Program has the primary objective to reduce peak kW demand utilizing a meter-based approach with a strategic mix of measures and targeted load shapes to maximize Total System Benefit (TSB) delivery. The goal will be to provide a customer and aggregator friendly platform for customers of all sizes to leverage a full range of customer-enabling behavioral and retrofit strategies to shift and reduce load. Inclusion of On-Bill and alternative financing will expand not only project scope but also the customer pool to capture stranded savings.

PG&E: Commercial Strategic Energy Management (PGE_Com_009)

Implementer: Stillwater Energy

The Commercial Strategic Energy Management (CSEM) program is a holistic, long-term, whole facility approach that uses a meter-based measurement and verification methodology to determine energy savings from all program activities at the facility, including capital projects, maintenance and operation improvements, as well as retrocommissioning. Participants receive coaching to develop their own energy management practices that will persist beyond their engagement with the program. Stillwater emphasizes a cohort-based approach where participants learn together and from each other through knowledge sharing and networking. The program launched in Q2 2025 and serves the Commercial, Institutional, and Public segments including, but not limited to, higher education, K-12 schools, government, hospital, lodging, office, grocery, commercial multifamily, warehouses not associated with manufacturing sites, and other healthcare. Recruitment efforts will take care to work around sub-segments already served by comparable programs, such as the Statewide HEEP program. Measures typical within CSEM program include HVAC (both heating and cooling), lighting, server closets, water pumping for buildings, water heating, and plug load.

PG&E: Simplified Savings Micro/Small Equity Program (PGE_Com_SmallBiz)

Implementer: Resource Innovations

The Simplified Savings Program is PG&E's equity segment program, which provides marketing, outreach and education, as well as direct install services, financing, and incentives for a traditionally underserved segment. Simplified Savings focuses on customers with a demand of less than 50kW and located within a Disadvantaged Community (DAC). Hard to Reach (HTR) customers who meet the demand requirements but are not located within a DAC community may also qualify for the program. Bill reduction and customer engagement are the primary measures of success of this equity program. Simplified Savings intends to engage 7,500 micro- and small business customers over its current three-year term.

SCE Commercial Programs

SCE administers and/or implements eight different commercial sector programs. The Simplified Savings program focuses on Small/Medium Business (SMB) solutions for HTR and DAC customers. Strategic Energy Management (SEM) programs offer commercial customers whole building solutions to customers. Last, the Commercial Energy Efficiency Program offers comprehensive EE solutions for commercial customers. Traditionally, commercial energy efficiency programs offer programs to customers in the areas: retail, restaurant, property management, grocery, warehouse, and hotels.

SCE: Simplified Savings (SCE_SMB_Equity_001)

Implementer: Resource Innovations

Resource Innovations' Small Medium Business Equity Program (Simplified Savings Program) aims to deliver meaningful energy bill savings to SCE's Small and Medium Business (SMB) customers that operate in Disadvantaged Communities (DAC), underserved and/or Hard-to-Reach (HTR) customers. The Program will achieve this through local partnerships with Trade Allies (TAs) as well as Community-Based Organizations (CBOs) for customer outreach, and will offer services such as energy education, bill analysis, free Direct Install (DI) measures, and incentives for higher impact energy saving measures (referred to as Post-DI measures). The Program focuses on non-residential SCE customers with a monthly maximum demand of <200 kW. Customers can select their TA by searching for contractors that match their desired criteria (such as languages spoken, diverse ownership, Better Business Bureau ratings and/or customer reviews).

SCE: Commercial Energy Efficiency (SCE_3P_2020RCI_005)

Implementer: Willdan Energy Solutions

SCEs Commercial Energy Efficiency Program (CEEP) provides comprehensive EE to commercial SCE customers. This program uses deemed, custom calculated, and Normalized Meter Energy Consumption (NMEC) approaches to reach customers across Commercial North American Industry Classification (NAICS) codes, including lodging, restaurants, grocery stores, warehouses, refrigerated warehouses, retail and technology and offices. This program was designed to increase Energy Efficiency adoption rates by targeting large customers, as well as small and medium customers. Small and medium customers include many hard-to-reach (HTR) customers and those in Disadvantaged Communities (DACs).

SCE: Commercial Energy Reduction Initiative (SCE_3P_2025C_001)

Implementer: Resource Innovations

Commercial Energy Reduction Initiative (CERI) is a resource acquisition program developed to support SCE's commercial customers, specifically targeting large commercial sectors such as healthcare, high-tech, biotech, and private education, as well as small-to-midsized businesses under 200 kW not currently served by other public purpose programs. These commercial customers present a strong opportunity for implementing impactful energy efficiency and electrification measures.

SCE: Comprehensive Refrigeration Energy Savings and Training (SCE_3P_2025C_002)

Implementer: Cascade Energy

Cascade Energy's Comprehensive Refrigeration Energy Savings and Training (CREST) program targets commercial customers in SCE's territory with energy-intensive refrigeration, process cooling, and HVAC systems. It uses site-level normalized metered energy consumption (NMEC) to quantify savings from behavioral, retro-commissioning, operational (BRO), and capital measures. To maximize total system benefits, CREST offers technical support, incentives for capital projects, and promotes low-GWP refrigerant change-outs and electrification. The program also includes training to engage customers, support workforce development, and extend measure lifespans. CREST is positioned as a no-cost, holistic decarbonization and energy management solution to help customers meet growing greenhouse gas reduction goals.

SCE: Grid-Responsive Incentive Design Market Access Program (GRID-MAP) (SCE_3P_2025MAP_001C)

Implementer: The Mendota Group

GRID-MAP provides commercial and residential customers opportunities to increase the efficiency of the buildings in which they work and live. The GRID MAP program incorporates strategies that provide an incentive structure based on NMEC savings methodologies and uses a market access approach that leverages Aggregators as the primary means of generating projects. The market access approach allows all qualified contractors the ability to participate in GRID-MAP under a standard set of terms. The program also leverages a customized software platform to improve the program's efficiency and effectiveness by allowing aggregators to scope projects, evaluate scenarios, submit applications and documents, and retrieve information online.

SCE: Measured Savings Program (SCE_3P_2025MAP_002C)

Implementer: Alternative Energy Systems Consulting, Inc.

Alternative Energy Systems Consulting's (AESC) Measured Savings Program is an Aggregator delivered, pay-for-performance program designed to deliver measurable impacts at the meter through demand side interventions for SCE commercial customers. Program Enrolled Aggregators have primary responsibility for identifying and enrolling customers and are paid based on weather-normalized hourly energy impacts, measured at the customer meter over a one-year measurement and verification (M&V) period, using primarily population-based Normalized Meter Energy Consumption (Pop-NMEC), paired with some site-specific NMEC (Site-NMEC). Program incentives are correlated to Total System Benefit (TSB), a measure of lifetime grid avoided costs, and reward projects that deliver summer peak kW savings, as well as measures that have longer Effective Useful Life (EUL).

SCE: Commercial Energy Manager Program (SCE_3P_SEM_001)

Implementer: CLEAResult Consulting, Inc.

The CLEAResult Local Commercial Strategic Energy Management (SEM) Program offers a comprehensive, facility-wide approach to energy efficiency that goes beyond traditional methods by using normalized metered energy data and dynamic baseline modeling to track savings from all energy-related activities. It requires a multi-year commitment from commercial sector participants, involving cohort-based workshops, site-specific energy analysis, and Measurement & Verification (M&V) aligned with California SEM Design Guides. The program targets a wide range of commercial buildings—such as hospitals, offices, hotels, and data centers—and provides flexibility in delivery methods to suit organizational needs. CLEAResult supports participants in identifying energy-saving opportunities and integrates with other incentive programs by adjusting savings models accordingly, aiming to help organizations build a sustainable, cost-effective energy management system.

SCE: SPARKe Commercial SEM Program (SCE_3P_SEM_003)

Implementer: Cascade Energy, LLC

The SPARKe Commercial Strategic Energy Management (SEM) Program is designed to help large non-residential customers in SCE's territory —those using over 2M kWh annually—overcome persistent barriers to energy efficiency. These customers face pressures to reduce operational costs and meet internal or external decarbonization goals. SPARKe supports them through technical assistance, coaching, and incentives, following the California SEM Design and M&V Guides over three two-year cycles to build long-term energy management capacity. The program enhances traditional SEM delivery with innovative approaches such as targeted customer engagement, inclusion of capital and electrification projects, streamlined reporting via Gazebo®, and tailored support for disadvantaged communities and diverse business enterprises. Its goals include maximizing energy savings and Total System Benefit, promoting electrification and decarbonization, and increasing customer satisfaction through flexible, inclusive program design.

SoCalGas Commercial Programs

The Commercial Energy Efficiency (CEE) Programs offers California's commercial customers a statewide-consistent suite of products and services to overcome the market barriers to optimized energy management. The program targets integrated energy management solutions through strategic energy planning support; technical support services, such as facility audits, and calculation and design assistance; and financial support through rebates, incentives, and financing options. Targeted end users include all commercial sub-segments such as distribution warehouses, office buildings, hotels, motels, restaurants, schools, trade schools, municipalities, universities, colleges, hospitals, retail facilities, entertainment centers, and smaller customers that have similar buying characteristics.

SCG 3813: Commercial – Savings By Design

Savings by Design (SBD) promotes integrated design by providing owner incentives, design team incentives, and design assistance to participants who design spaces that perform at least 10% better than Title 24. SBD encourages energy-efficient building design and construction practices. SBD offers in collaboration with SCE and LADWP in their respective shared territories. Within the joint SoCalGas/SCE territory, SCE acts as the lead utility, and SoCalGas buys back therms associated with dual electric and gas projects. Program is closing and currently closed to new commitments.

SCG 3882: COM-Small and Medium Commercial EE Program (Resource Acquisition)

This program targets small and medium businesses customer facilities in San Bernadino, Riverside, and Orange County (with therm usage up to 50,000 therms per year) with an emphasis on restaurants, lodging, dry cleaning, retail, and offices among other segments. The program will focus on helping businesses in disadvantaged communities improve their competitiveness by saving energy through several program resources, including assessments, kits, and prescribed incentives.

SCG 3887: COM-Commercial-BEST (Resource)

This program targets small and medium businesses excluding San Bernadino, Riverside, and Orange County that have an annual gas energy usage up to 50,000 therms. The program will have an emphasis on customer segments with predominantly high natural gas loads, such as hospitality, restaurants, laundries, small medical, and office buildings. The program will offer a suite of measures that have a set incentive rate as well as measures that are offered through Direct Install. The program will utilize a comprehensive outreach strategy that leverages Business Energy Advisors, contractor/trade allies and community-based organizations that cater to small and medium-sized businesses. Financing support for customers who participate in the program will also be leveraged by offering access to several financing agencies based on the company and project history, project size, and project scope.

SCG 3891: Service RCx+ Program

The program offers participating customers population-level normalized metered energy consumption (NMEC)-based energy savings through the direct implementation of retrocommissioning (RCx) and optimization services at large commercial facilities throughout the SoCalGas service territory.
SCG3941 – New Program. No IP yet but approved in the SoCalGas business plan and Tual.

SCG 3892: COM-Large Commercial Energy Efficiency Program

The program serves large commercial customers with annual gas consumption of more than 50,000 therms. Market segments that will be serviced include, but are not limited to office, retail, healthcare, lodging, food service, laundry & dry cleaning, gymnasiums, family entertainment centers, and all other commercial segments. The program offers a tailored approach that includes segment-specific marketing, targeted outreach, site-specific energy audit reports, technical assistance, financing, deemed rebates, custom incentives, and measurement and verification. Energy efficiency upgrades are delivered with a full- service, pay-for-performance approach.

SCG 3898: COM-Nonresidential Behavioral Program

SCG is running a behavioral energy efficiency program, which offers behavior intervention strategies to commercial participants to achieve short-term energy and budget savings that can persist and produce long-term behavior change and energy savings. This is achieved by fostering participant engagement, ensuring participant satisfaction, and providing energy education and upgrades through regular and participant-specific touchpoints in the form of digital Business Energy Reports (BERs) and a web-based education portal through the lazy-login feature. Behavioral programs are required to employ comparative energy usage and disclosure, ex-post measurement, and experimental design. In the commercial sector, randomly selected customers receive their usage feedback via paper and email reports leveraging their usage data. This program includes the use of normative or comparative information, personalized communication about the customers' energy usage, and any other demographic factors.

SCG 3909: Business Energy Efficiency Surveys (BEES)

The Business Energy Efficiency Surveys (BEES) program is a non-residential energy assessment program that offers SoCalGas customers in the Commercial, Industrial and Agriculture sectors no-cost energy surveys and referrals to applicable energy efficiency, and water conservation programs. Services include hosting educational webinars for each non-residential sector, customer screening and acquisition, report generation and presentations to customers, and follow-up calls and meetings with other energy efficiency programs to drive customer action to conduct constant improvements.

SCG 3910: CC-Nonresidential Calculated Incentives

This program provides customers technical and calculation assistance, as well as incentives based on calculated savings, to influence the design and installation of energy efficient equipment and systems in both retrofit and added load applications. This program is largely utilized for projects where a rebate is not available through a Deemed program, where project conditions require customized calculations to provide the most accurate savings estimates, or where a project has interactive effects that are best captured through whole building or whole system modeling.

Because calculated savings estimates are based on actual customer operating conditions, pre-inspections (for retrofit projects) and post-inspections are typically required as part of each project's documentation.

SCG 3911: CC-Nonresidential Deemed Incentive Program

This program provides rebates for the installation of energy efficient equipment. Deemed retrofit measures have prescribed energy savings and incentive amounts and are generally intended for projects that have well defined energy and demand savings estimates. The program model is designed to reduce the initial purchase costs of such equipment and offer a simple application process. Providing a menu of prescribed common measures simplifies the process of reviewing project proposals and provides a "per-widget" rebate that reduces the cost of retrofitting outdated, inefficient equipment and new construction measures.

SCG 3937: COM-Small and Medium Commercial EE Program

This cost-effective program is categorized as Resource Acquisition, but it has a significant Equity Segment focus. This program targets small and medium business customer facilities (with therm usage up to 50,000 therms per year) with an emphasis on restaurants, lodging, dry cleaning, retail, and offices among other segments. The program will focus on helping businesses in disadvantaged communities improve their competitiveness by saving energy through several program resources, including assessments, kits, and prescribed incentives.

SCG 3939: COM-Strategic Energy Management

The Commercial Strategic Energy Management (SEM) program provides SEM services, technical assistance and incentives to the commercial sector within the SoCalGas service territory. Commercial SEM targets commercial organizations, especially those in industries with the highest use of natural gas, such as restaurants, healthcare, offices, retail, and laundry sub-segments using a downstream market approach and leveraging the SEM savings platform to deliver cost-effective energy savings.

SCG 3940: COM-Commercial-BEST

This cost-effective program is categorized as Resource Acquisition, but it has a significant Equity Segment focus. The program targets small and medium businesses excluding San Bernadino, Riverside, and Orange County that have an annual gas energy usage up to 50,000 therms. The program will have an emphasis on customer segments with predominantly high natural gas loads, such as hospitality, restaurants, laundries, small medical, and office buildings. The program will offer a suite of measures that with incentives complimented with Direct Install measures. The program uses a comprehensive outreach strategy that leverages Business Energy Advisors, contractor/trade allies and community-based organizations that cater to small and medium-sized businesses. Financing support for customers who participate in the program will also be leveraged by offering access to several financing agencies based on the company and project history, size, and scope.

SCG 3970: COM - Energy Efficiency and Rehabilitation Program

The Energy Efficiency and Rehabilitation (EER) Program is an innovative, no-cost energy efficiency direct install program. The EER Program combines revenues from privately sponsored live events with Southern California Gas Company's (SoCalGas) energy efficiency Public Purpose Program ratepayer funds to deliver energy-efficient gas-saving equipment to SoCalGas customers. This offering reduces reliance on ratepayer funds while expanding energy efficiency (EE) opportunities for SoCalGas customers. Eco Entertainment (Implementer) hosts live events in partnership with an event promoter. It uses a portion of the revenues generated to combine with the ratepayer energy efficiency funds, delivering a no-cost EE direct install program.

SCG 3971: COM - Grid-Responsive Incentive Design Market Access Program

The Grid-Responsive Incentive Design Market Access Program ("GRID-MAP" or "the Program") is a resource acquisition energy efficiency (EE) program available to commercial and residential customers in Southern California Gas Company's (SoCalGas) service territory. The Program uses a market access program (MAP) approach that works with Aggregators to offer various services that best fit with what customers require to advance EE projects. GRID-MAP aligns incentives with grid needs using a rate structure based on Total System Benefit (TSB). Incentives are paid only for savings that are delivered to the utility system as determined by the population-based Normalized Metered Energy Consumption (NMEC) measurement approach and supplemented by site-based NMEC, as appropriate.

Commercial Coordination

CCR REN and the Joint PAs plan to engage in regular communication through email, with the potential for establishing a regular meeting schedule (for example, quarterly) if needed to streamline communication channels. Meetings may include discussions on customer choice, marketing, and double dipping prevention.

CCR REN and the Joint PAs will develop a protocol to verify customer eligibility to prevent "double incentives." This will require the data requestor (i.e., implementer) to complete an in-depth security review and data sharing agreements among the implementer, CCR REN, and IOUs to ensure customer data is protected.

The IOUs, CCR REN, and SoCalREN program staff will present all available program options and evaluate customer needs on a case-by-case basis. If CCR REN or SoCalREN encounter a customer they cannot serve through its program (perhaps through geographical requirements), or that would be better served by the IOU programs (perhaps due to customer size or project scope), it will hand off the customer to the appropriate IOU contacts. If the IOUs encounter a customer that they cannot serve or that would be better served by CCR REN or SoCalREN programs (perhaps due to customer size or project scope), the IOUs will hand off the customer to the appropriate CCR REN or SoCalREN contacts.

AGRICULTURAL SECTOR

CCR REN does not have any programs in the Agricultural Sector; therefore, below is solely a description of the SoCalREN and Joint IOU programs.

SoCalREN Agricultural Programs

SoCalREN: Agriculture Project Delivery Program (SCR-AGR-G1)

The Ag-PDP program assists eligible Agriculture customers in Southern California Edison (SCE) and SoCalGas service areas. It identifies energy-saving measures, collaborates throughout the project lifecycle, and implements efficiency strategies. Targeting small and medium businesses, it aims to reduce energy and maintenance costs for facilities at no cost to customers.

Table 9: Compliance with REN Program Criteria: Agricultural

REN Criteria	SoCalREN SCR-AGR-G1
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	This program is exclusive to Small/HTR Agriculture businesses.

SoCalREN: Rural-HTR Agricultural DI (SCR-AGR-G2)

The Rural-HTR Ag DI Program offers technical assistance, incentives, and direct installation services to qualified agricultural customers. It aims to achieve energy savings by optimizing upgrades for end users. The program collaborates with technology providers, distributors, and contractors to enhance energy efficiency for underserved customers, streamlining cost-effective installations for Ag Customers, including Small to Medium Ag Customers and Disadvantaged Communities.

Table 10: Compliance with REN Program Criteria: Agricultural

REN Criteria	SoCalREN SCR-AGR-G2
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A

2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	This program is exclusive to Small/HTR Agriculture businesses.

SoCalREN: Agriculture Retrofit (SCR-AGR-G3)

The Custom Comprehensive Incentive program by SoCalREN aims to enhance energy savings for small to medium-sized, rural, and disadvantaged agricultural customers. It provides technical assistance through energy advisor audits, along with engineering support and performance rebates to offset installation costs. Priority marketing targets small and medium Ag Customers, including water agencies and irrigation districts.

Table 11: Compliance with REN Program Criteria: Agricultural

REN Criteria	SoCalREN SCR-AGR-G3
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	This program is exclusive to Small/HTR Agriculture businesses.

PG&E Agricultural Programs

PG&E

PG&E: Agricultural Calculated Program (PGE 21031)

Implementer: PG&E

PG&E implements the Agricultural Calculated program. Currently in the ramp-down process, this program is focused on meeting existing customer commitments and closed to new applications. These elements of service have been built into third-party programs which address most customer circumstances.

PG&E: Agricultural Deemed Incentives Program (PGE21032)

Implementer: PG&E

The Agricultural Deemed Incentives program provides fixed rebates for high volume measures such as variable frequency drives (VFDs) for irrigation pumps or process fans. Deemed retrofit measures have fixed incentive amounts per unit/measure and are intended for projects that have well-defined energy and demand savings. This is a legacy program implemented by PG&E and is in the process of ramping down.

PG&E: Agricultural Energy Advisor Program (PGE21034)

Implementer: PG&E

The Agricultural Energy Advisor Program provides customer education and encourages participation in EE, DR, self-generation programs and promotes awareness of GHG and water conservation activities. The Program provides energy savings opportunities and continuous improvement over time by supporting online self-service tools, such as Business Energy Checkup[16], for agricultural customers. Through Business Energy Checkup, customers receive rate analysis, check their bills, and receive tips and tricks for saving energy. Aligning integrated improvement opportunities with customers' needs, the Energy Advisor Program also increases program participation and adoption rates by helping customers to better understand EE benefits.

PG&E: Agricultural Energy Savings Action Plan (AESAP) Program (PGE_Ag_001)

Implementer: TRC

The Agricultural Energy Savings Action Plan (AESAP) Program supports PG&E's vision for the agricultural sector to maximize yield while reducing energy consumption. AESAP uses data, technical assistance, analytics, energy efficiency measures and marketing to reduce demand, increase operational efficiency, and broaden customer participation while leveraging the custom, deemed, and meter-based savings platforms. AESAP also promotes and leverages OBF and other private financing options as a tool to off-set the barrier of lack of capital to fund projects.

SCE Agricultural Programs

SCE: Agriculture Energy Efficiency (SCE_3P_2021AGPUB_001)

Implementer: ICF Resources

The Agriculture Energy Efficiency (AgEE) Program helps growers and producers incorporate Energy Efficiency equipment and technology at their facilities. This program is focused on Energy Efficiency improvements that help agriculture customers conserve electricity. Traditionally, agriculture customers are interested in controlled environment agriculture, non-dairy animal production, dairy animal production, irrigated crops, cold storage, and post-harvest processing. This program is open to all SCE agriculture customers, including Hard to Reach (HTR) and Disadvantaged Community customers. There

[16] Business Energy Checkup is located within the pge.com/myaccount website for customers to perform a Facility Audit, read about recommendations on energy use, and explore rate options.

are no qualifications needed to receive educational material or agriculture energy efficiency solutions that help increase production and profits.

SCE: Local Industrial and Agricultural Strategic Energy Management (SEM) Program (SCE_3P_SEM_002A)

Implementer: CLEAResult Consulting, Inc.

The Local Industrial and Agricultural Strategic Energy Management (SEM) Program is a comprehensive, multi-year initiative designed to help organizations in the industrial and agricultural sectors achieve measurable energy efficiency improvements. Unlike traditional programs, SEM takes a holistic, whole-facility approach by using normalized metered energy data and dynamic baseline modeling to track savings from all energy-related activities, including capital upgrades, retrofits, maintenance, and operational changes. Participants commit to ongoing engagement through cohort-based workshops, site-specific energy analysis, and Measurement & Verification (M&V) tailored to their facility's operations. Ultimately, the program aims to build a sustainable energy management foundation that streamlines processes, improves quality control, and delivers cost-effective energy savings across a wide range of industrial and agricultural facilities.

SCE: SPARKe Commercial SEM Program (SCE_3P_SEM_004A)

Implementer: Cascade Energy, LLC

The SPARKe Industrial & Agricultural Strategic Energy Management (SEM) Program is designed to help large non-residential customers—particularly those using over 2 million kWh annually in SCE's territory—overcome barriers to energy efficiency by offering technical, coaching, and incentive support. Based on the California SEM Design and M&V Guides, SPARKe guides participants through a structured six-year progression of educational modules and site-specific activities to build long-term energy management capacity. The program enhances traditional SEM delivery with innovative approaches such as targeted customer outreach, tailored support for smaller large customers, shared energy managers, and streamlined reporting via Gazebo®. It also promotes electrification and decarbonization through expert consultation and financial incentives, while ensuring equity through financing options, Disadvantaged Community (DAC) recruitment, and Diverse Business Enterprise (DBE) subcontracting. SPARKe aims to maximize energy savings and Total System Benefit by integrating capital and electrification projects into a single, flexible program framework.

SoCalGas Agricultural Programs

The Agricultural Energy Efficiency (AEE) Program facilitates the delivery of integrated energy management solutions to California's agricultural customers. The program offers a suite of products and services, such as strategic energy planning support, technical support services, facility audits, calculation/design assistance, financing options, and financial support through rebates and incentives. In addition, the program adopts and supports the strategies and actions of the Agricultural and Industrial chapters of the CLTEESP and the energy efficiency business plan. The AEE Programs target end-users such as irrigated agricultural growers (crops, fruits, vegetable, and nuts), greenhouses, post-harvest processors (ginners, nut hullers, and associated refrigerated warehouses), and dairies. Due to North American Industry Classification System (NAICS) designations, food processors have traditionally received IOU services through the Industrial program offering. However, there are those facilities with on-site processing that are integrated with growers and their products, as is the case with some fruit and vegetable processors (canners, dryers, and freezers), prepared food manufacturers, wineries, and water distribution customers that may be addressed by this program's offerings. To address the potential in these markets, SoCalGas offers four AEE programs.

SCG 3890: Agriculture Energy Efficiency (AgEE)

This program serves agricultural customers of all sizes by delivering energy efficiency solutions tailored to the agricultural sector. The program identifies and works with agricultural customers to help them understand the benefits of implementing energy saving projects and measures; provides technical and project development assistance as needed; offers financial incentives and financing options; and for DAC and HTR customers, provides direct installation of certain energy saving measures.

SCG 3909: Business Energy Efficiency Surveys (BEES)

The Business Energy Efficiency Surveys (BEES) program is a non-residential energy assessment program that offers SoCalGas customers in the Commercial, Industrial and Agriculture sectors no-cost energy surveys and referrals to applicable energy efficiency, and water conservation programs. Services include hosting educational webinars for each non-residential sector, customer screening and acquisition, report generation and presentations to customers, and follow-up calls and meetings with other energy efficiency programs to drive customer action to conduct constant improvements.

SCG 3911: CC-Nonresidential Deemed Incentive Program

This program provides rebates for the installation of energy efficient equipment. Deemed retrofit measures have prescribed energy savings and incentive amounts and are generally intended for projects that have well defined energy and demand savings estimates. The program model is designed to reduce the initial purchase costs of such equipment and offer a simple application process. Providing a menu of prescribed common measures simplifies the process of reviewing project proposals and provides a "per-widget" rebate that reduces the cost of retrofitting outdated, inefficient equipment and new construction measures.

Agricultural Coordination

Although CCR REN does not have any Agricultural programs, the joint PAs referenced in this JCM and throughout the State meet quarterly to discuss the Agricultural sector. Overlap, concerns, and coordination will be communicated through that regular meeting.

PUBLIC SECTOR

CCR REN: Public Equity Program (CCR-PUB-001)

The CCR REN public program will *only* be offered in the Central Coast, a territory that is not part of this JCM. Accordingly, this section is offered for information purposes only.

The CCR REN Public Equity Program is designed to provide support to hard-to-reach, disadvantaged, and underserved public agencies in the counties of Monterey, San Benito, and Santa Cruz to help them access funding to address energy efficiency opportunities. The program builds on CCR REN Partner Organizations' existing relationships, data, and experience bringing energy savings to public sector customers.

The primary barriers faced by hard-to-reach public agencies when considering energy efficiency opportunities in their facilities are lack of funding, staff capacity, and understanding of available resources. The CCR REN Public Equity Program will address these barriers, acknowledging that the needs and interest of each public facility will vary, to ensure equitable access to resources. The objectives of the program are to increase energy savings, drive public agency participation in existing energy efficiency programs (i.e. existing investor-owned utility (IOU) programs such as local government partnerships and the GK12 program), and help secure competitive state and federal grants.

For hard-to-reach public agencies, providing support at every step of the process is critical since they are faced with cascading challenges that often need immediate response, such as pandemic events, climate change induced disasters, and earthquakes. Providing agencies with the resources they need to improve their facilities through energy efficiency, demand response, and electrification is crucial for agencies to succeed in their mission of serving their communities. There is a gap between initial energy efficiency audits that initially identify opportunities and the deeper analyzes that need to be completed in order to obtain funding for deep energy efficiency retrofits. The CCR REN public equity program is indended to fill that gap.

A focus of the program will be strengthening the Partner Organization's relationships with public agency staff and elected officials. By gaining trust, public agencies will be more willing to consider and later implement energy efficiency opportunities. This in turn will help facilitate more comprehensive public agency energy efficiency, demand response, and electrification projects, resulting in deeper energy and cost savings. Reporting successes to both senior staff and elected officials will also lead to knowledge transfer among public agencies and help create a policymaker-level understanding that energy efficiency can deliver deep value and savings not only to agency facilities, but also to the community at large.

Table 12: Compliance with REN Program Criteria: Public

REN Criteria	CCR-PUB-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A

3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	CCR-PUB-001 will provide technical assistance and supportive services to HTR public customers in the Monterey Bay. The program will prioritize serving public agencies that are geographically HTR and provide services to disadvantaged and underserved communities.

SoCalREN Public Sector Programs

SoCalREN: Energy Efficiency Project Delivery Program (SCR-PUBL-B1)

The PDP bridges market gaps, offering public agencies an integrated and comprehensive energy efficiency (EE) solution. Services include energy planning, audits, financing support, and project management. A dedicated Project Manager guides agencies through implementation, unlocking access to SoCalREN programs and streamlining clean energy initiatives.

Table 13: Compliance with REN Program Criteria: Public

REN Criteria	SoCalREN SCR-PUBL-B1
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	Program that provides public agencies with one-stop, turnkey integrated EE solutions through detailed energy use analysis, project design assistance, procurement assistance, and construction management support.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

SoCalREN: Distributed Energy Resource Disadvantaged Communities Program (SCR-PUBL-B2)

The DER DAC Program, known as “Pathway to Zero,” expands SoCalREN’s energy efficiency (EE) project delivery for public agencies. It integrates Distributed Energy Resources (DERs) and sustainability strategies, aiming to achieve zero net energy (ZNE). The program provides EE project management, education, and expertise, supporting underserved agencies in comprehensive resiliency strategies.

Table 14: Compliance with REN Program Criteria: Public

REN Criteria	SoCalREN SCR-PUBL-B2

1. Activities that utilities or CCA PAs cannot or do not intend to undertake	Program integrates DER's and other sustainability strategies to support underserved agencies, which is not offered elsewhere.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

SoCalREN: Streamlined Savings Pathway Program (SSP) (SCR-PUBL-B4)

The SSP expedites comprehensive energy efficiency (EE) projects for public agencies. It provides monetary incentives based on lifecycle greenhouse gas (GHG) reductions. Enhanced incentives prioritize disadvantaged, rural, and low-income communities. Agencies receive technical expertise and project management through SoCalREN's non-resource programs, enabling a streamlined EE project delivery experience and a leap into the clean energy future.

Table 15: Compliance with REN Program Criteria: Public

REN Criteria	SoCalREN SCR-PUBL-B4
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	Program offer incentives and effective methods to deliver energy savings while filling gaps left by IOUs.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

SoCalREN: Rural-HTR Public Agency Direct Install (SCR-PUBL-B5)

The DI Program addresses energy savings gaps for small public agencies. Historically, smaller facilities were excluded due to low savings opportunities and strict criteria. SoCalREN's DI Program provides streamlined, no-cost implementation of energy efficiency measures, overcoming barriers. Eligible facilities receive hands-on project management support for lighting and HVAC upgrades.

Table 16: Compliance with REN Program Criteria: Public

REN Criteria	SoCalREN SCR-PUBL-B5

1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	Third party resource programs with high cost-effectiveness criteria do not target smaller customers with low energy savings potential. The DI program specifically targets these underserved customers.

SoCalREN: Energy Resiliency Action Plan (SCR-PUBL-B6)

The ERAP Program develops an energy efficiency (EE) and Distributed Energy Resources (DER) roadmap to enhance critical infrastructure resilience. It generates regional maps, considering climate and socioeconomic indicators, to aid agencies in prioritizing project implementation. Community engagement and energy inventories inform customized goals and strategies.

Table 17: Compliance with REN Program Criteria: Public

REN Criteria	SoCalREN SCR-PUBL-B6
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	The ERAP program will fill gaps by leading public agency-focused energy resiliency planning and project deployment strategies which are activities the IOUs do not intend to undertake. The ERAP program takes an innovative approach to support public agencies with individualized and regional energy resilience planning, an effort where there is no current IOU program offering.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

SoCalREN: Regional Partner Initiatives (SCR-PUBL-B7)

SoCalREN establishes Regional Partner Initiatives to address diverse public agency needs. Leveraging regional partners, it tests innovative intervention strategies that can be scaled to other regions. A streamlined application process allows partners to submit ideas, which are evaluated based on alignment with SoCalREN's core values.

Table 18: Compliance with REN Program Criteria: Public

REN Criteria	SoCalREN SCR-PUBL-B7
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	The Regional Partner Initiative program will fill gaps by having regional partners submit proposals for new and modified offerings where historical programs have closed. All regional partners serve some HTR markets and are prompted to identify whether and how their proposed initiatives would support those. The Regional Partner Initiative Program creates an outlet for innovative ideas and fulfills gaps. Successful initiatives will be evaluated for scalability.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

SoCalREN: Water & Wastewater Strategic Energy Management (SCR-PUBL-B8)

The SEM program addresses energy challenges in water and wastewater facilities. It offers project management and technical services to reduce peak demand and enhance grid reliability. Incentives for peak demand reductions are provided through a strategic energy management approach. The program streamlines integration with other SoCalREN public agency programs, ensuring effective implementation and post-installation support.

Table 19: Compliance with REN Program Criteria: Public

REN Criteria	SoCalREN SCR-PUBL-B8
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	Anticipated third-party programs supporting water and wastewater agencies will have high-cost effectiveness criteria and will not target smaller

	customers with low energy savings potential. The WWSEM program will support the agencies that are excluded from third party program opportunities.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

SoCalREN: Underserved Schools Strategic Energy Management (SCR-PUBL-B9)

The USSEM program engages building occupants and staff in systematic energy management practices for underserved schools and community colleges. It targets approximately 120 schools, offering comprehensive services to overcome limited staff resources. By utilizing a Strategic Energy Management (SEM) approach, it supports peak demand reduction and deep energy efficiency retrofits, aiming to reduce peak period charges.

Table 20: Compliance with REN Program Criteria: Public

REN Criteria	SoCalREN SCR-PUBL-B9
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	The USSEM Program will fill gaps by offering long-term energy management guidance, targeted training, and behavioral capacity building strategies at underserved HTR schools.

SoCalREN: Water Infrastructure Program (SCR-PUBL-B10)

The WIP offers long-term Energy Efficiency (EE) solutions for water systems in the SoCalREN service territory. It serves Water Agencies, Wastewater Agencies, and other water customers. WIP delivers demand reductions and energy savings through rebates and incentives for eligible measures, enhancing the efficiency of water production, distribution, and treatment systems.

Table 21: Compliance with REN Program Criteria: Public

REN Criteria	SoCalREN SCR-PUBL-B10
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	This program is designed to complement SCE's statewide water and wastewater program by providing support for more complex and time intensive projects. Since utility programs are required to be cost-effective, they cannot undertake measures and projects that require multiple years to develop and complete.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

PG&E Public Sector Programs

PG&E: Local Government Partnership – CC LEAP

Implementer: The Energy Coalition

Since 2020, PG&E has had contracts with Local Government Partners (LGPs) within 3C-REN service area that support the following counties with the full LGP offerings: Santa Barbara & San Luis Obispo. Service includes, support for energy efficiency project leads for PG&E's Government and K-12 Comprehensive resource programs.

PG&E's Local Government Partnerships (LGPs) are collaborations with public entities that shape EE and sustainability at the local, regional, and statewide level. These partnerships aim to meet the needs of local and state government, schools, and educational institutions to offer comprehensive solutions that are flexible, innovative, and a reflection of the communities' needs.

CC-LEAP provides support K-12 public schools and offers energy planning services for public entities interested in benchmarking their facilities, pursuing local energy reach codes and ordinances serving public sector customers. LGPs are one of PG&E's vehicles for serving small medium businesses (SMB), including Hard-to-Reach and Disadvantaged Communities.

LGPs in Santa Barbara and San Luis Obispo provide utility bill analysis and site visits to develop a set of recommended energy efficiency and electrification interventions, to show what a local building or portfolio of buildings would need to do to meet local energy goals. The LGPs recommend the best available rebate, incentive, financing, technical assistance offerings, statewide, and other programs (ex. WISE) for all projects and interventions identified. PG&E LGPs offer long-term plans such as Climate Action Plans and Energy Action Plans.

Services typically offered through LGPs include the following:

- Benchmarking public buildings
- Facilitating energy efficiency projects in public buildings and supporting implementation of Energy Management Processes/Plans
- Facilitating energy efficiency projects for HTR or DAC customers
- Facilitating hosting trainings for public sector staff and customers
- Development of Energy Action Plans
- Assistance in the development of local EE Reach Code ordinances
- Completing Municipal/K-12/Community-wide GHG inventories.

PG&E: Government and K-12 Schools Program PGE_PUB_009

Implementer: Willdan

The Government and K-12 (GK-12) Comprehensive Program includes a broad offering of EE measures to diverse markets of local governments and K-12 public and charter schools. GK-12 has an emphasis on building electrification, with a strong focus on water heating, which aligns with substantial interest in the government and K-12 sectors. Utilizing the meter-based savings platforms, the Program offers HVAC and Lighting equipment and control system upgrades, retro commissioning recommendations, and behavioral strategies to optimize system efficiencies. The Program is designed to cost-effectively complete all sizes and scopes of projects and has a goal of engaging nearly half of its customers from the HTR and DAC sectors.

PG&E: Statewide State of California Energy Strategy and Support Program (PGE_SW_IP_Gov)

Implementer: AESC

The State of California Energy Strategy and Support Program (SOC ESS) opened to customers in September 2021. SOC ESS helps California State Agencies (excluding higher education, which is served by a Statewide program led by SCE) reach their greenhouse gas (GHG) emission reductions goals while reducing energy use through EE and Integrated Demand-side Management (IDSM) project planning, technical support, and financial assistance. The program builds on the State's successful existing approaches while adding new channels to address key barriers in California state agencies. SOC ESS is designed to overcome structural and operational barriers related to staffing and capacity, capital and financing, and safety to support successful realization of energy savings in state buildings. The Program offers two pathways with varying levels of support. Pathway 1 provides agencies that are committed to a minimum level of energy savings and program engagement with high-touch, customized, and strategic portfolio-wide and engineering support plus staff augmentation. Pathway 2 provides support on individual projects as identified and pursued. Additionally, the Program continues to provide all agencies with the services they relied on through the prior statewide partnership programs which includes financial, policy, technical, project, and program application support.

SCE Public Sector Programs

SCE: Public Energy Performance (SCE_3P_2021AGPUB_002)

Implementer: CLEAResult Consulting, Inc.

The CLEAResult Public Energy Performance (PEP) combines traditional energy efficiency programs (Custom, Deemed) with supported energy action plan implementation and Strategic Energy Management. Strategic Energy Management (SEM) is a holistic, whole facility approach that uses Normalized Meter Energy Consumption (NMEC) and dynamic baseline model to determine energy savings from all program activity at the facility, including capital projects, custom and deemed retrofits, behavioral, retro commissioning and Operations (BRO) projects. The SEM offering for the Public sector requires a multi-year customer commitment to participate in multiple cohort-type training workshops, individual or cohort energy analysis site and Measurement and Evaluation (M&V) activities based on information and characteristics of the facility's specific operations. The PEP program targets customers across the Public Sector and delivers savings to diverse building types owned by public/private local education authorities, municipal, county and federal governments, tribal entities, and private universities/trade schools. This program does not include public higher education institutions, state government facilities, or public hospitals.

SCE: Higher Education Efficiency Performance Program (SCE_SW_IP_Colleges)

Implementer: CLEAResult Consulting, Inc.

The Higher Education Efficiency Performance Program (HEEP) integrates traditional energy efficiency programs with Strategic Energy Management (SEM), a comprehensive, facility-wide approach that uses dynamic baseline modeling to track energy savings from all activities, including capital projects, retrofits, and behavioral or operational improvements. Targeting higher education institutions, SEM requires a multi-year commitment involving cohort-based training, site-specific energy analysis, and measurement and evaluation. Participants can join individually or as part of a cohort, with all program elements aligned to the California SEM Design Guide. The program identifies opportunities through SEM Treasure Hunts and Opportunity Registers, focusing on behavioral changes, retro-commissioning, operations and maintenance, and capital upgrades across systems like lighting, HVAC, and kitchen equipment to drive long-term energy savings and performance improvements.

SCE: Statewide Water Infrastructure and System Efficiency Program (SCE_SW_WP)

Implementer: Lincus, Inc.

The Statewide Water Infrastructure and System Efficiency™ Program (SW WISE™) is a resource acquisition program offered across PG&E, SCE, SoCalGas, and SDG&E territories, aimed at improving energy efficiency in water production, distribution, wastewater treatment, and oil field pumping systems. It serves a wide range of customers, including public agencies, private companies, and utilities that pay the Public Purpose Programs charge. SW WISE™ provides engineering and project support services, including energy assessments, feasibility studies, measure recommendations, post-installation validation, and incentive processing. The program also trains trade allies to promote efficient technologies and supports customers with rebates and technical guidance to implement eligible energy-saving measures. Uniformly delivered statewide, SW WISE™ helps reduce electricity and gas use, lower greenhouse gas emissions, and contribute to California's SB32 climate goals.

SCG Public Sector Programs

SoCalGas has served public sector customers for many years through its public energy efficiency programs, local government partnerships with cities and counties, state agencies through Statewide Partnerships, and higher education customers. SoCalGas will rely on a combination of existing, proven strategies and new, innovative program strategies to provide a complete set of energy efficiency solutions for the public customers. Public sector customers are generally governed by a centralized decision-making authority uniquely positioned to transform their organization's decision-making processes. These structures are well-positioned to achieve deeper energy efficiency and adopt other demand-side management solutions (including clean renewables) to help reduce operational costs and environmental impacts in support of federal, state, and local mandates.

SCG 3886: Public Small/Medium Public Program

This program is a turnkey cost-effective end-to-end solution for SoCalGas that serves small and medium local government, federal government, and education (K-12) facilities that consume less than 50,000 therms annually. The program offers no-cost direct install technologies, co-payment rebates, energy surveys, and program offers advanced energy efficiency improvements that can be financed.

SCG 3899: Large Public Program

The Large Public Sector in CA experiences many barriers to implementing energy efficiency (EE) projects or measures because of bureaucratic customer procurement processes, long project cycles and decision making, and a proliferation of out-of-territory stakeholders. The Large Public Sector Program (LPS Program) brings key interventions to overcome these unique barriers. The interventions are custom projects through capital infrastructure upgrades, deemed measures, and direct install as a target opportunity for this type of customer. For SoCalGas customers of large local government, federal government, and education (K-12) facilities that consume over 50,000 therms annually and allow for more flexible engagement that demonstrates the value of regional partnering while maintaining direct relationships with existing partners and implementers as well as developing new relationships with public agencies.

Public Coordination

Since there is no program overlap given that the CCR REN public program is not offered in the relevant territory covering this JCM, coordination is not applicable.

CROSS-CUTTING – CODES AND STANDARDS

CCR REN: Codes and Standards Program (CCR-C&S-001)

Implementer: In Balance Green Consulting

The CCR REN's Codes and Standards program supports code enforcement agencies and better equips the building design and construction community to implement California's ambitious Building Energy Efficiency Standards (Title 24), helping make buildings more efficient, paving the way for zero net energy building stock, and reducing energy use and greenhouse gas emissions in some of rural California's most climate-challenged regions. This will be accomplished through a broad range of educational trainings, field code support and technical assistance and ancillary offerings such as coordinated efforts regionally to engage in code cycle updates.

CCR REN will complement these resources with materials that address the regional characteristics of each area. The Codes & Standards program page on the CCR REN website will be home to relevant resources of value to local governments and building professionals, including case studies relevant to various rural regions, based on local characteristics such as climate zones, and will include pertinent information for local building officials and those who support code compliance and permit processing. Resources housed on or linked from the program page of the website will include energy code compliance resources (EnergyCodeAce.com), other relevant information including fire recovery updates, links to local ordinances that extend beyond Title 24 (LocalEnergyCodes.com) information about zero net energy (ZNE) and ZNE-Ready buildings. As the program rolls out, there will be an emphasis on developing and translating program resources and materials to Spanish.

CCR REN will utilize materials that have already been developed by other Portfolio Administrators to ensure the efficient use of ratepayer funds, minimizing duplication and leveraging tactics that have proven successful.

Table 22: Compliance with REN Program Criteria: Cross-Cutting – Codes & Standards

REN Criteria	CRR-C&S-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	CCR REN's Codes & Standards program will operate exclusively in hard to reach, disadvantaged and underserved communities.

SoCalREN Cross-Cutting – Codes and Standards

SoCalREN does not offer any Codes & Standards programs and will leverage other PAs programs.

PG&E & SCE Cross-Cutting – Codes and Standards

PG&E and SCE: Codes and Standards Compliance Improvement (SCE-13-SW-008C and PGE21053)

Implementers: Energy Solutions, NORESCO, Gabel Associates, Lisa McLain, Selby Energy, Misti Bruceri and Associates

PG&E's and SCE's Compliance Improvement programs assist with improving compliance for both the California Energy Code (Title 24, Part 6) and select portions of the CALGreen standards (Title 24, Part 11), and California's Appliance Efficiency Regulations (Title 20). Compliance improvement activities complement advocacy work by enabling potential savings from C&S to be realized and persist over time. The Compliance Improvement program targets market actors throughout the entire compliance supply chain by providing needs-based tools, training, resources, and outreach. More information can be found at energycodeace.com.

PG&E and SCE: Codes and Standards Reach Codes (SCE-13-SW-008D and PGE21054)

Implementers: Frontier Energy, Misti Bruceri and Associates

PG&E's and SCE's Reach Codes programs provide cost-effectiveness research and analysis, model ordinance language and other code development and implementation tools to local jurisdictions that are interested in pursuing local ordinances which extend beyond the state's minimum energy code requirements. The Reach Codes program also addresses ordinances that extend over portions of the CALGreen standards (Title 24, Part 11), such as EV infrastructure requirements. More information can be found at localenergycodes.com and calgreeninfo.com.

SCE: Planning and Coordination (SCE-13-SW-008E)

Implementer: SCE

The Codes and Standards (C&S) Planning and Coordination (P&C) program supports SCE's portfolio planning to meet statewide energy, equity, and building decarbonization goals. It plays a key coordination role across IOU and non-IOU programs, integrating efforts in areas like emerging technologies, workforce training, and energy efficiency. The program helps accelerate market adoption of successful technologies and practices by supporting their transition into industry standards and eventually into code. Although non-advocacy and locally focused, P&C collaborates with other IOUs and contributes insights that may inform broader utility portfolios. Rather than replacing existing efforts, P&C aims to fill gaps and provide data-driven recommendations to enhance coordination and code preparedness.

Cross-Cutting: Codes and Standards Coordination

The Joint PAs will approach C&S coordination with the goal of offering transparency through regular communication, efficiency through a collaborative approach to any shared resources, and support for the success of programs across the service area. The Joint PAs will meet on an as-needed basis, with the goal of quarterly meetings, to coordinate the C&S programs.

CCR REN aims to provide coverage not currently being provided by the IOUs, as well as services targeting hard-to-reach rural markets that may complement existing IOU resources. The majority of CCR REN's Codes & Standards program activities are related to offering Energy Code and Green Building Standards trainings, regional forums, and the Energy Codes Coach service.

The Joint PAs will furnish each PA with their respective lists of available C&S tools, trainings and resources, including those in development stages. Whenever feasible, CCR REN will leverage existing IOU curriculum and training by communicating training needs via email or in coordination meetings with the IOU. A clear chain of communication and identified contacts will be exchanged for each program and/or sub-program. The IOUs' Compliance Improvement team representatives will provide a list of trainings to CCR REN on a quarterly basis, which is also available on the Energy Code Ace website.

Additionally, there will be a standing agenda item at Joint PA meetings to discuss the topics of trainings in development, even if only at a high level. This will reduce the potential for duplication of efforts. Once CCR REN reviews this list, CCR REN will determine which existing offerings should be leveraged and coordinate with the IOUs to deliver these resources. CCR REN will develop a calendar with potential dates of when these offerings can be delivered to audiences in the SJV and High Sierra regions. This calendar will be shared with the IOU's and scheduled based on the availability and resource requirements. When CCR REN determines there is a training gap, CCR REN will develop additional training resources and communicate that to the IOUs, working to avoid duplication by leveraging any existing resources. The IOUs will make CCR REN aware of resources available as courses are scheduled for delivery and new job aides ("resources" or "tools") are developed.

The Statewide C&S Team's annual training schedule is set at the beginning of the year and modified as building departments and other market actors request trainings. All offerings are posted on the Energy Code Ace website training page as courses are scheduled.

CCR REN and the IOUs will plan to meet quarterly on reach codes, with the option of combining with the Compliance Improvement meeting for efficiency as needed. The IOUs will make CCR REN aware of Reach Code program cost-effectiveness research and analysis, model ordinance language and other code development and implementation tools. The IOUs will invite CCR REN to statewide Reach Codes meetings where other RENs are included. The Reach Code program representatives will provide updates to the CCR REN on relevant reach codes activities, at check-in meetings when reach codes are on the agenda or in ad hoc meetings as needed to supplement what is publicly available on LocalEnergyCodes.com. CCR REN will reciprocate with updates on regional progress in supporting jurisdictions interested in developing energy ordinance and direct customers to IOU program work products when they can be utilized in lieu of duplicating efforts.

Figure 2: REN and PG&E Codes and Standards Program Focus

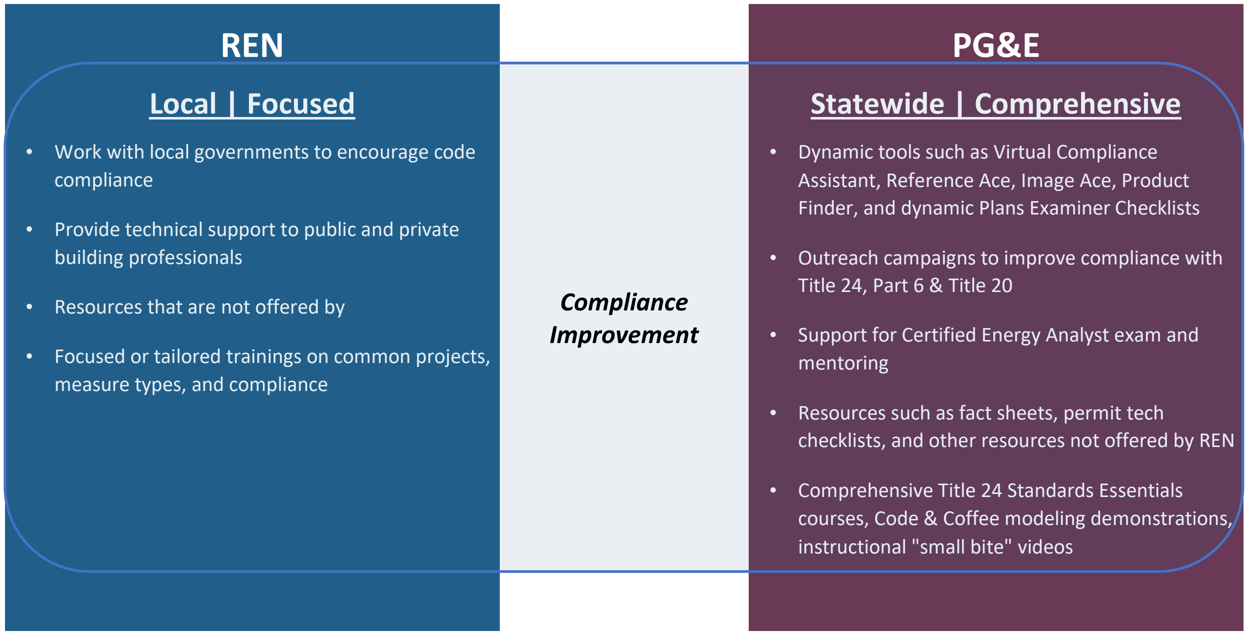
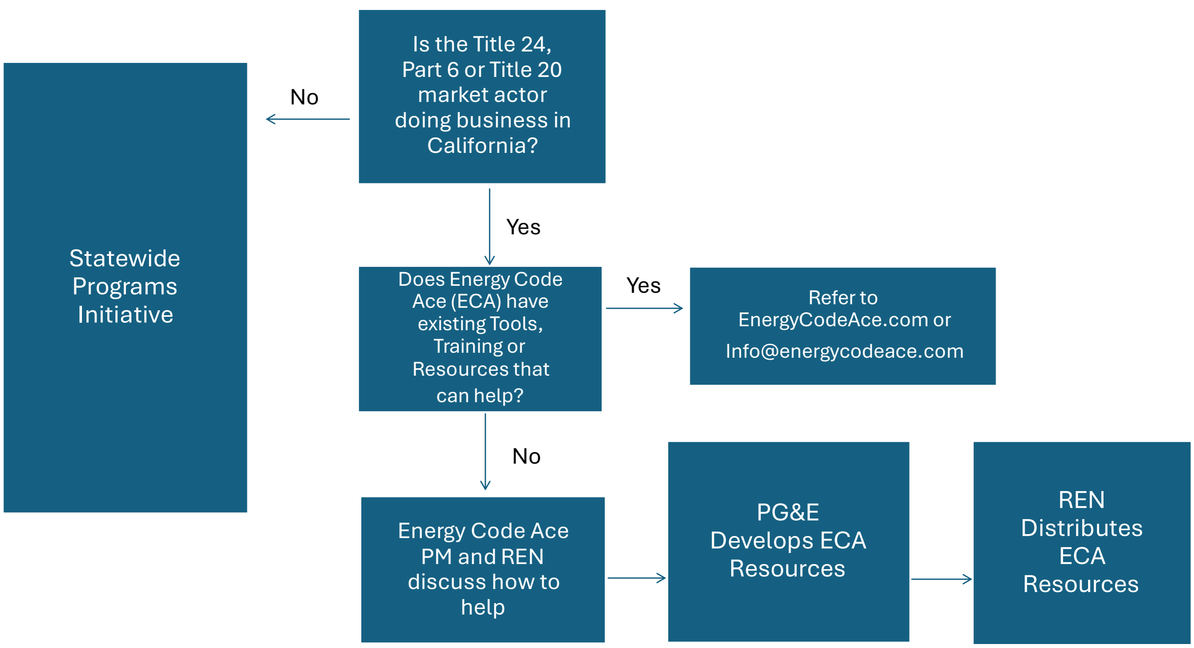


Figure 3: Coordination Protocol for Codes and Standards Programs



CROSS-CUTTING – WORKFORCE EDUCATION AND TRAINING

CCR-REN: Workforce Education and Training Equity Program (CRR-WET-001)

Implementer: Rising Sun Center for Opportunity

The CCR REN Workforce, Education and Training (WE&T) program accelerates training (upskilling of existing workers and training for new workers) and increases employment opportunities. Seeking to address equity issues, access to, and awareness of energy-related careers, the CCR REN WE&T program presents pathways to diffuse program benefits more equitably for rural, hard to reach, disadvantaged and underserved residents. Program pathways are targeted broadly for disadvantaged workers, but specifically target opportunity youth, women, communities of color, and displaced agricultural workers.

The program addresses skills training, trades' advancement, and pre-apprenticeship placement and supports building professionals while coordinating with third-party program implementers and local employers to increase opportunities. It will support training for and employment of Energy Advisers to deliver parts of CCR REN's Residential Equity and Commercial programs and upskill trades in the regions.

The program will offer customized versions of in-person and virtual training curricula to best serve the populations in each specific region. Individuals are enrolled into the program pathway best suited for them, and training is delivered directly and/or in coordination with the CCR REN's community partners, ensuring the development of a well-trained and knowledgeable workforce that reflects their community's needs.

This program will create placement opportunities for program graduates in other CCR REN programs, and both the Clean Energy Academy and Climate Careers will offer pathways to employment in energy efficiency programs and the trades.

Table 23: Compliance with REN Program Criteria: Cross-cutting, WE&T

REN Criteria	CRR-WET-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	CCR REN's program will recruit students from disadvantaged, hard-to-reach and underserved areas exclusively.

Market and Outreach to HTR WET Customers:

CCR REN's Workforce, Education, and Training Equity program targets youth age 16-24 living in hard-to-reach rural areas, and/or disadvantaged and underserved communities which comprise the majority of CCR REN's service area. Specific marketing and outreach tactics will include:

- Placing ads in local print media such as newspapers and bulletins
- Distributing flyers and collateral through local governments and merchants
- Messaging via local social media and other online outlets

SoCalREN WE&T Programs

SoCalREN: ACES Pathway (SCR-WET-D2)

Implementer: Emerald Cities Collaborative

The ACES program aligns K-12 and college students with community colleges, offering a head start in Science, Technology, Engineering, Arts, and Math (STEAM) pathways. Tuition-free college enrollment allows students to take engineering, architecture, and construction-related courses for transferable credit. ACES integrates STEAM education to cultivate a skilled workforce for energy efficiency careers in the public sector, emphasizing the transition from training to employment.

Table 24: Compliance with REN Program Criteria: Cross-cutting, WE&T

REN Criteria	SoCalREN SCR-WET-D2
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	The program is designed to increase the diversity of the utility/EE sector by overcoming the barriers/challenges connecting workers and contractors from HTR/DAC to EE training, jobs and business opportunities.

SoCalREN: Green Path Careers (SCR-WET-D3)

Implementer: Emerald Cities Collaborative

The GPC Program offers at-risk youth and adults access to the emerging Energy Efficiency (EE) sector. Through collaboration between SoCalREN and Workforce Development, Aging, and Community Services

(WDACS), it provides education, training, and work experience. GPC eliminates barriers by offering certification training, supportive services, and coaching, enabling participants to begin their EE careers.

Table 25: Compliance with REN Program Criteria: Cross-cutting, WE&T

REN Criteria	SoCalREN SCR-WET-D3
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	The program is designed to increase the diversity of the utility/EE sector by overcoming the barriers/challenges connecting workers and contractors from HTR/DAC to EE training, jobs, and business opportunities.

SoCalREN: WE&T Opportunity HUB (SCR-WET-D4)

Implementer: Emerald Cities Collaborative

The WE&T Opportunity Hub serves as a one-stop resource for energy efficiency (EE) information, training, and networking. It aims to address labor shortages in EE/RE construction by empowering Black Indigenous People of Color (BIPOC) residents with skills, jobs, and business opportunities. The program supports participants from recruitment to job readiness.

Table 26: Compliance with REN Program Criteria: Cross-cutting, WE&T

REN Criteria	SoCalREN SCR-WET-D4
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	The program is designed to increase the diversity of the utility/EE sector by overcoming the barriers/challenges connecting workers and contractors from HTR/DAC to EE training, jobs, and business opportunities.

SoCalREN: Agriculture WE&T (SCR-WET-D5)

Implementer: TBD

The Ag-WE&T program aims to expand cost-effective energy efficiency projects in agriculture. It builds a network of qualified Ag service providers, trains them to promote energy efficiency, and integrates it as a standard practice. SoCalREN's overarching goal is to enhance the Ag EE labor force's size, skills, and diversity in Southern California, ensuring effective implementation of state EE goals. Priority marketing targets Small to Medium Ag Customers, including Disadvantaged Communities and Socially Disadvantaged Farmers and Ranchers.

Table 27: Compliance with REN Program Criteria: Cross-cutting, WE&T

REN Criteria	SoCalREN SCR-WET-D5
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	Neither utilities nor CCA program administrators will intend to have a workforce education and training Agricultural program that will expand the knowledge and adoption of energy efficient measures to disadvantaged, small and medium rural and underserved agriculture communities.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

SoCalREN: E-Contractor Academy (SCR-WET-D6)

Implementer: Emerald Cities Collaborative

The program aims to educate, train, and support small businesses, including SWMDVBEs, minorities, and disadvantaged workers. Focused on the energy efficiency (EE) industry, it prepares diverse contractors to compete for and execute EE projects in Southern California. While not limited to small businesses, priority is given to SWMDVBEs.

Table 28: Compliance with REN Program Criteria: Cross-cutting, WE&T

REN Criteria	SoCalREN SCR-WET-D6
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	The program is designed to increase the diversity of the utility/EE sector by overcoming the barriers/challenges connecting workers and contractors from HTR/DAC to EE training, jobs, and business opportunities.

2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

PG&E WE&T Programs

PG&E: WE&T Integrated Energy Education and Training (IEET) (PGE_21071)

Implementer: PG&E - Local

PG&E's local Integrated Energy Education & Training (IEET) program serves the incumbent energy efficiency, electrification and decarbonization workforce—people who design, build, maintain, or operate buildings and building systems—across several market segments, including agriculture, foodservice, commercial, industrial, and residential. IEET typically provides in-person and web-based education and training programs, collaborations with training partners including community colleges, and energy measurement tool loans.

PG&E: WE&T Career Connections (CC): Energy is Everything (EisE) (PGE_SW_WET_CC))

Implementer: The Energy Coalition (TEC)

The statewide Career Connections third-party "Energy is Everything" (EisE) program helps to build the next generation of energy workers. EisE provides Kindergarten through Twelfth grade students the knowledge, skills, and abilities they need for college and career opportunities in the energy industry and motivates students to adopt pro-environmental behaviors. EisE incorporates career concepts for all learners, since early exposure to career options increases the chances of students pursuing and securing high-demand energy and STEM careers. Education providers targeted will primarily focus on those classified as "disadvantaged".

PG&E: WE&T Career & Workforce Readiness (CWR): Energize Careers (PGE_SW_WET_Work)

Implementer: Strategic Energy Innovations (SEI)

Energize Careers aims to create a diverse and representational energy workforce through the economic empowerment of people who experience personal or systemic barriers to entering and remaining in the energy workforce. Energize Careers assists program participants in accessing technical training and energy career opportunities. Energize Careers provides holistic services to support disadvantaged workers through technical training, job placement, and wrap-around service support. Energize Careers collaborates with pre-apprenticeship programs, apprenticeship programs, community-based training organizations, and community colleges to provide technical energy job training to disadvantaged workers. Energize Careers also collaborates with wrap-around service providers and industry partners to provide people with services and support to enter career pathways where they can leverage their energy efficiency knowledge and skills.

The CWR program currently being implemented by SEI under the name Energize Careers is in ramp-down stage and will end in early 2026. The CWR program has been rebid and will launch in mid-2026.

SCE WE&T Programs

SCE WE&T programs are statewide programs led by PG&E.

SoCalGas WE&T Programs

The Workforce Education, Training and Outreach (WET&O) sector represents a portfolio of education, training, and collaborative engagement between the IOUs and other stakeholders involved in energy education, training, and outreach at all points of the market channel. SoCalGas WET&O targets a workforce of new and existing energy efficiency trade professionals, allies, as well as market channel and other customer intermediaries using a variety of market support interventions.

WET&O involves a coordinated working relationship between stakeholders, collaborators, and service providers. SoCalGas will work with public and private industry sectors to find new approaches, or advance existing means to provide beneficial value to the energy efficiency portfolio efforts.

SCG 3729: Integrated Energy Efficiency Training

The Workforce Education and Training (WE&T) Program represents a portfolio of education, training, and collaborative engagement between the IOUs and other stakeholders involved in energy education and training. SoCalGas WE&T targets an audience of incumbent workers and new workers entering the workforce through technical upskill and core energy education. WE&T actively seeks to make measured advancements in DACs and HTR communities. SoCalGas's Integrated Energy Efficiency Training (IEET) continues providing relative industry related trainings to attract audiences representing various occupations. These trainings allowed for immediate application of increased knowledge and skills to trades & professions, defining the value of the SoCalGas IEET program portfolio. Within COVID-19 guidelines, WE&T - IEET delivered a hybrid of online webinars and in-person seminars to continue providing learning resources to customers. Delivering a hybrid training portfolio allowed for the effective and efficient delivery of training. As the training portfolio continues to evolve, the WE&T team continues to develop and implement best practices for providing training. IEET delivered its' HVAC/R portfolio industry classes utilizing both online and in-person training. The online delivery of classes was integrated with hands-on training sessions through video & online demonstrations. This training is important to new and incumbent workers in efforts to achieve industry certifications which include HVAC/R Support Training and North American Technician Excellence (NATE) courses and exams. IEET also effectively adapted to evolving circumstances to continue delivering quality training, consultations & demonstrations throughout the year. Events delivered high quality and informative course material designed to address gaps in new & incumbent workers & industry educational needs. Examples include Building Science, Distributed Energy, Green building Certifications, Resources (Combined Heat & Power) & Steam License Preparation webinars emphasizing compliance with building code design, energy-efficiency, and resource conservation.

SCG3760 HERS Rater Training Advancement

The program promotes, develops, and delivers training to currently certified Home Energy Rating System (HERS) raters, energy analysts, HVAC technicians, building department officials, other building trade professionals, residential homeowners, and technical students with a focus on participants involved in new and existing engineering and construction. The curriculum addresses technical and administrative elements of energy ratings, energy efficiency standards including changes based on updated Title 24 requirements, and industry best practices.

SCG3764 Residential – Living wise

The program is a school-delivered residential energy savings program that provides a blend of classroom activities and take-home energy efficiency kit retrofit and audit projects which students complete as homework assignments with their parents and families. Audit data and installation reports are collected via surveys, which are returned to teachers and forwarded for tabulation and storage. The program is applied at the 6th Grade level in California to best align with State Learning Standards, and is offered to eligible teachers as an elective program.

SCG3901 WE&T Community Support Outreach Program

The Community Support Outreach (CSO) Program is an in-language, non-resource, highly targeted EE marketing, outreach, and education program. The program targets DACs and HTR customers in underserved communities, such as Vietnamese, Indian, Chinese, Korean, and Hispanic speaking customers, and other ethnic customer segments across all sectors.

The program markets SoCalGas' EE programs with energy efficiency education and training, through professional organizations, schools, customer intermediaries, faith-based organizations, and community events. The program's marketing efforts garner interest and lead to participation in SoCalGas' EE Programs. CSO is active in all of SoCalGas's territory.

SCG3909: Business Energy Efficiency Surveys (BEES)

The Business Energy Efficiency Surveys (BEES) program is a non-residential energy assessment program that offers SoCalGas customers in the Commercial, Industrial and Agriculture sectors no-cost energy surveys and referrals to applicable energy efficiency, and water conservation programs. Services include hosting educational webinars for each non-residential sector, customer screening and acquisition, report generation and presentations to customers, and follow-up calls and meetings with other energy efficiency programs to drive customer action to conduct constant improvements.

SCG3941: Sustainability Studio

An Implementation Plan has not been finalized for this program yet, but the program has been approved in the SoCalGas business plan and TUAL.

Workforce, Education, and Training Coordination

The PAs will approach WE&T coordination with the goal of offering transparency through regular communication, efficiency through a collaborative approach to any shared resources, and support for the success of programs across the service area. The PAs will meet on a regular basis, to coordinate WE&T programs and will include discussion of each program at these meetings.

Meetings will focus on current programs, offerings, and regions. CCR REN will inform the other PAs of developed curriculum, impacts, enrollment, expansion, and coordination needs for offerings under the WE&T program.

CROSS-CUTTING – FINANCE

CRR REN: Finance Equity Program (CCR-FIN-001)

CCR REN's cross-cutting Finance program will equitably support the residential, small/medium business (commercial) and public sectors in the CCR REN communities through low/no cost loans that will encourage and accelerate the implementation of energy efficiency projects. Loan products will address first cost and access to capital barriers that exist in rural California and will span gaps in current IOU and other statewide offerings. The program will offer bridge loans to complement and improve the effectiveness of IOU On-Bill Financing. Micro loans will fill a niche in the realm of currently available financing products for loans for energy efficiency upgrades below current minimum loan amounts, with easy qualifying and flexible repayment terms.

Bridge loans will provide CCR REN customers a means of covering the cost of energy upgrade projects before other funding is received (which may include On Bill Financing (OBF), incentives/rebates, or other external loans, grants, or financing programs). In the case of OBF, bridge loans will bridge the time gap between time of approval for an IOU's OBF and the disbursement of OBF funds upon verification of the project installation by the OBF program. This gap, which can be months or in some cases a year or more, can be a significant financial hardship for cash strapped rural customers. Micro loans will allow customers to implement energy efficiency and decarbonization measures with no out of pocket cost.

Detailed design and implementation of the finance program will be outsourced to a third-party

expert in energy finance and details of the program will be included in the Implementation Plan.

<u>The Finance program is anticipated to begin ramping up in 2026 and be fully operational in 2027.</u>

Table 29: Compliance with REN Program Criteria: Cross-cutting, Finance

REN Criteria	CCR-FIN-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	Program to target rural and hard-to-reach residential and commercial customers.

Market and Outreach to HTR Finance Customers: Since this program is not set to launch until 2027, specific marketing and outreach tactics have not been developed. CCR REN will work with the other PAs well in advance of program launch and will provide specific marketing plans.

SoCalREN Finance Programs

SoCalREN: Public Agency Revolving Loan Fund (SCR-FIN-C1)

This program, led by regional partners, educates communities and provides customized outreach to individual businesses. Green Business Coordinators conduct facility audits for eligible small and medium-sized businesses (SMBs). It coordinates with other programs, offers incentives for energy efficiency upgrades, and guides SMBs through CAGBN certification. The primary goal is to expedite public sector projects, especially for underserved facilities, when capital is scarce.

Table 30: Compliance with REN Program Criteria: Cross-cutting, Finance

REN Criteria	SoCalREN SCR-FIN-C1
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	Neither utilities nor CCA program administrators will intend to have a finance Public program that will accelerate the adoption of energy efficient measures to disadvantaged, small and medium rural and underserved agriculture communities.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

SoCalREN: Rural-HTR Agriculture Finance Assistance Program (SCR-FIN-C3)

The program aims to expand cost-effective energy efficiency projects for disadvantaged, rural, and underserved agriculture communities. It provides bridge funding through On-Bill Financing (OBF) revolving loans, establishes Third-Party (3P) financing relationships, and collaborates with the Ag-PDP. The goal is to accelerate project implementation and support energy upgrades for Ag customers.

Table 31: Compliance with REN Program Criteria: Cross-cutting, Finance

REN Criteria	SoCalREN SCR-FIN-C3
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	Neither utilities nor CCA program administrators will intend to have a finance Agricultural program that will accelerate the adoption of energy efficient measures to

	disadvantaged, small and medium rural and underserved agriculture communities.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

PG&E Finance Programs

PG&E: On-Bill Financing (PGE_OBFAP)

Implementer: PG&E

OBF is a key enabler of energy savings across customer classes, providing zero-percent financing for qualifying EE retrofits, with loan payments appearing as fixed monthly charges on the customer's PG&E bill. OBF helps customers, who would otherwise have difficulty qualifying for commercial credit, get over the first-cost hurdle to EE investment, unlocking broader and deeper cost savings while supporting PG&E's energy savings targets. More information to support customers can be found on the OBF Website[17], including eligibility and application.

OBF relies on the development of the project by a Trade Professional enrolled in the PG&E Trade Professional Program or a PG&E Program Implementer. PG&E will work with the REN to train trade professionals in the region who have interest in developing OBF Projects

Statewide Financing

State of California : Go Green Financing

Implementer: California Alternative Energy and Advanced Transportation Financing Authority

GoGreen Financing is funded by PG&E (with other IOUs) to provide below market rate financing for residential and commercial customers. The program is operated by the California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA)[18]. Reduced rate l*oans are provided by banks and credit unions* participating in the program *to support customers with their clean energy projects.*

[17] www.pge.com/obf

[18] https://www.treasurer.ca.gov/CAEATFA/

Table 32: Summary of Financing Offerings

Program	Customer	Funding Available	Measures	Links
On-Bill Financing	Non-Residential Customers	$250,000 with terms up to ten years (120 months). Projects that qualify as unique energy savings opportunities can qualify for up to $4,000,000 with terms up to ten years (120 Months)	Energy Efficiency, EV Charging Battery Storage 50% of the loan must be used for Energy Efficiency, the other 50% can be used for EV Charging and/or Battery Storage	https://www.pge.com/assets/pge/docs/save-energy-and-money/energy-savings-programs/handbook_obf.pdf
GoGreen Home	Residential	Private loans with participating lenders that are subsidized by PG&E. Terms are variable by lender see current offerings here: //www.gogreenfinancing.com/energy-efficiency-home-loans-california/finance-options/	Clean Energy (Solar must be paired with Battery), Energy Efficiency, EV Charging	https://www.gogreenfinancing.com/energy-efficiency-home-loans-california/
GoGreen Business	Small Business	Private loans with participating lenders that are subsidized by PG&E. Terms are variable by lender see current offerings here. https://www.gogreenfinancing.com/energy-efficiency-business-loans-california/finance-options/	Clean Energy (Solar must be paired with Battery), Energy Efficiency, EV Charging	https://www.gogreenfinancing.com/energy-efficiency-business-loans-california/

SCE Finance Programs

SCE: On-Bill Financing (SCE-13-SW--007A)

Implementer: SCE

SCEs On-Bill Financing (OBF) program provide zero percent interest loans to non-residential customers in the Commercial, Industrial, Agricultural and Public Sector market segments for the installation of Energy Efficiency projects. The OBF program incentivizes the installation of Energy Efficiency improvements by reducing the burden of upfront costs for the improvements while offering loan payment through the customer's utility bill

SCE: New Finance Offerings (SCE-13-SW-007C)

Implementer: SCE

The New Finance Offerings Program, also known as GoGreen Financing, is a program administered by the California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA) and offered with the support of SCE and the other California IOUs to increase customer use of clean energy. The program offers scalable and leveraged financing products, tests the effectiveness of third-party financing and ratepayer-funded credit enhancements, and tests whether payment via the utility increases debt service performance across market sectors for clean energy-related improvements.

SCG Finance Programs

SCG 3735: On-Bill Financing

On-Bill Financing On-Bill Financing (OBF) offers interest-free, unsecured, repayment of loans on-the-utility-bill that work in conjunction with SoCalGas energy efficiency rebate programs. The program is designed to facilitate the purchase and installation of qualified energy efficiency measures by non-residential customers who lack up-front capital to invest in real and sustainable long-term energy cost reductions. Loan terms range from up to ten years for commercial customers and up to fifteen years for government agency customers. The eligible loan amount is based on the project cost, less incentives, or rebates, up to the loan maximum of the OBF product and within the loan term thresholds. Customer loan repayments are calculated to approximately equal the monthly energy savings and repaid through a fixed monthly installment on their utility bills. There is no prepayment penalty and loans are non-transferable. Partial or non-payment of loans could result in gas service disruption. On-Bill Financing (OBF) program features:

- Zero percent interest
- No closing costs
- Unsecured loan
- Loan repayment added directly to SCG utility-bill
- Works in conjunction with utility energy efficiency rebate programs.

SCG 3737: New Finance Offerings

D.13-09-044 authorized a series of financing programs designed to attract private capital to finance energy upgrades and established the California Hub for Energy Efficiency Financing (CHEEF) to administer the new programs. The CPUC requested that the California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA) assume the administration of the CHEEF and directed the investor-owned utilities (IOUs) and CPUC staff to assist CAEATFA with implementation. SoCalGas serves as the lead IOU for the programs and is responsible for the contracts with CAEATFA and the statewide marketing vendor.

The financing programs incentivize private finance companies to enter the energy efficiency market and improve terms or expand credit criteria for the financing of energy projects by providing a credit enhancement funded with IOU ratepayer funds. A key objective is to test whether ratepayer support for credit enhancements can lead to self-supporting energy efficiency finance programs in the future.

The programs are branded as GoGreen Financing and marketed statewide to encourage deeper energy savings to help California reduce greenhouse gas emissions. GoGreen Financing is available to residential, small businesses, and multifamily customers who are installing energy efficiency or clean energy technologies.

Finance Coordination

Although CCR REN's finance program will not launch until 2027, CCR REN will coordinate with the IOUs and SoCalREN on ramp up and launch activities when the time comes. At the time of the next JCM a robust coordination schedule will be agreed upon by the IOUs, SoCalREN, and CCR REN to establish an agreed upon collaboration framework.

THIRD-PARTY COORDINATION

The Joint IOUs may solicit third-party programs in addition to the programs noted above, which will be implemented by third-party implementers. The Joint IOUs will work with the third-party implementers to share relevant CCR REN and SoCalREN program information with the program staff, to avoid duplication and streamline customer handoffs, in alignment with direction in D.23-06-055 that IOUs "must convey information to third-party bidders during the solicitation process, for buildings that have a potential to be served by both IOUs' third-party implementers and regional energy networks (RENs), about RENs' efforts to identify hard-to-reach customers or buildings to target for marketing of REN programs." CCR REN, SoCalREN and Joint IOUs will have regularly reoccurring meetings to develop protocols and each PA will ensure that their respective implementers are aware of and will comply with the terms of this JCM.

The Joint IOU sector leads and if deemed appropriate by the sector leads, the third-party implementers, CCR REN and SoCalREN program staff will present all available program options and evaluate customer needs on a case-by-case basis. If CCR REN and SoCalREN encounter a customer that cannot be served through its program (perhaps due to geographical requirements), or that would be better served by the IOU third-party programs (perhaps due to customer size or project scope), they will hand off the customer to the appropriate IOU contacts. If the third-party program encounters a customer that they cannot serve or that would be better served by CCR REN or SoCalREN REN programs (perhaps due to customer size or project scope), they will hand off the customer to the appropriate IOU and CCR REN and/or SoCalREN contacts. CCR REN, SoCalREN and the IOUs will have regularly reoccurring meetings to develop and employ third-party implementer coordination practices to ensure that there are protocols for customer handoffs.

The Joint IOUs will provide solicitation schedules and updates at quarterly PRG meetings and CAEECC meetings. As third-party programs are negotiated and launched, an advice letter will be filed with the R.13-11-005 service list, as well as a public webinar invitation for all stakeholders to join and learn and comment.[19]

[19] D. 18-01-004 : DECISION ADDRESSING THIRD PARTY SOLICITATION PROCESS FOR ENERGY EFFICIENCY PROGRAMS outlining the third-party solicitation process, was later amended by D.23-02-002 OP7 to allow single stage solicitations

STATEWIDE PROGRAM COORDINATION

Coordination protocols with each statewide program offered by the three IOUs included in this JCM have been discussed in the sector-specific sections above. For reference, the areas for coordination with statewide programs include commercial and cross-cutting.

At this time, the parties have not specifically identified offerings in the CCR REN and SoCalREN residential and commercial program offerings are substantially similar[20] to any statewide programs; therefore, the parties to this JCM have determined that, at this time, regular coordination to avoid duplication is unnecessary. However, there are some aspects of the CCR REN programs that may allow for and require coordination among programs. CCR REN will provide referrals to statewide financing programs to program participants when appropriate. CCR REN will also follow similar established coordination protocols for coordination with other Statewide programs to ensure coordination with statewide programs. Specifically, CCR REN will coordinate as detailed above with SDG&E on the Plug Load Appliance program that may have similar offerings.

The Statewide Programs available to customers are as follows:

Statewide Commercial Midstream Water Heating

Implementer: DNV Energy Systems USA (PA: SoCalGas)

A distributor-centric model design, which collaborates with a network of distributors that specialize in the sale of efficient natural gas and electric measures. Point-of-sale discounts and incentives are paid at the midstream level to distributors based on transactions and sales to contractors. All customers with commercial rate structures served by one of the four IOUs are eligible for program participation.

More information can be found on the Program Website[21] or by contacting the lead IOU, SoCal Gas Company.

Statewide Upstream & Midstream Heating, Ventilation and Air Conditioning Program

Implementer: CleaResult (PA: SDG&E)

The Statewide Upstream & Midstream Heating, Ventilation and Air Conditioning Program, known as Comfortably California, is an upstream and midstream program that offers HVAC measures including high-efficiency commercial unitary air conditioners, commercial heat pumps, commercial chillers,

[20] "Substantively Similar" was defined in the Joint-PA Tier 2 Advice Letter, filed October 1 2024, in compliance with D.23-06-055 OP32 (an extension from September 1, 2024 to October 1, 2024 was granted).
"Substantively Similar", per the Advice letter are programs in the same sector, segment, and PA territory, also meeting the following: For programs in the three segments below that meet the definition of Program Overlap, those programs are Substantively Similar if their characteristics (as listed below) are the same:

- Resource Acquisition: End use and measure(s) are the same.
- Market Support: Demand, Supply, Partnership, Innovation and Accessibility (sub-objectives from D.23-06-055)
- Equity: Addressing disparities in access, promoting resilience, health, safety, affordability and or energy savings, reducing GHG and pollutant emission, and providing workforce opportunities. (Objectives from D.23-06-055)

[21] https://www.statewide-waterheating.com/

commercial space heating boilers, residential air conditioners, residential heat pumps, residential gas furnaces and residential gravity wall furnaces.

More information can be found on the Program Website[22] or by contacting the lead IOU, San Diego Gas and Electric Company.

Statewide Foodservice Instant Rebates program

Implementer: Energy Solutions (PA: SoCalGas)

The Statewide Foodservice Instant Rebate Program, California Energy Wise, delivers natural gas, electric and water savings by offering midstream POS incentives for the sale and installation of high-efficiency commercial food service equipment via turnkey implementation services including participant enrollment and engagement such as; identify eligible program participants and advocates and leverage established relationships to enroll them in the program, and perform direct customer outreach to the chain restaurant, education, and grocery sectors along with HTR/DAC customers. Energy Solutions is the implementer of this program with partner Frontier Energy. The intent of the program is to move the instant rebates program beyond just the retail point of sale strategy to capture more supply chain to customer interactions. The program has its own set up rebates and spiffs (for participating supply chain companies) to encourage their promotion of the program and stocking of EE qualified products.

More information can be found on the Program Website[23], additionally the Qualifying Product List (QPL) and participating distributor lists are located on the California Energy Wise / Rebates page. The lead IOU for this program is SoCalGas Company.

Statewide Plug Load Appliance Program

Implementer: CleaResult (PA: SDG&E)

The Statewide Plug Load Application program, Golden State Rebate Program, provides instant rebates on energy-efficient products to help Californians save energy and live comfortably. Customers receive these rebates through coupons they can redeem in store or online at participating retailers. Eligible customers include:

- Residential customers
  - Customer must reside in a single-family, multi-family, or manufactured home.
  - Customer can be a homeowner or a renter. (Renter is responsible for obtaining the property owner’s permission to install the product associated with the rebate.)

More information can be found on the Program website[24], or by contacting the lead IOU, San Diego Gas and Electric Company.

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[22] https://www.comfortablyca.com/

[23] https://caenergywise.com/rebates/

[24] https://goldenstaterebates.com/

Statewide Home Energy Score Program

Partner: StopWaste (PA: BayREN)

Home Energy Score is a program of the U.S. Department of Energy. StopWaste is a Home Energy Score partner serving the San Francisco Bay Area in collaboration with BayREN. The Program provides training and access to the DOE Home Energy Score tool to qualified assessors to perform Home Energy Score assessments for qualifying homes in the San Francisco Bay Area. The Program also fulfills other DOE requirements for Home Energy Score partner organizations. More information can be found on the Program website[25], or by contacting the lead PA, BayREN.

[25] https://www.bayren.org/

APPENDIX

Residential Segment Program Summary

Program Parameters	CCR REN [Residential]	SoCalREN [Multifamily Program, Residential Kits4Kids, Small HTR Multifamily Direct Install]	SCE [Energy Savings Assistance (ESA), Multifamily Residential Direct Install, Residential Energy Advisor, Customer Home Engagement for Energy Reduction (CHEER), Residential Energy Solutions, Enervee Marketplace, Disadvantaged Communities Marketing and Outreach]	SCG [Residential Energy Advisor, Residential Energy Efficiency Program, Multifamily Whole Building Program (Equity), Residential Behavioral Program, EE Marketplace, Retail Channel Support, Community Language Efficiency Outreach Program, Residential Advanced Clean Energy Program (Resource Acquisition), Comprehensive Mobile Home Program, Sustainability Studio, Residential Mobile Home Program, Multifamily Energy Alliance Program (Resource Acquisition), Residential Advanced Clean Energy Program (Equity), Multifamily Energy Alliance Program (Equity), Multifamily Whole Building Program (Resource Acquisition), Res Energy Efficiency Program Equity, TEG Wall Furnace Direct	PG&E [Energy Savings Assistance (ESA)]	*CA Energy Smart Homes Program* **Residential Resource Acquisition**

				Install Program (Resource Acquisition]		
Eligible Customer (s)	*Hard-to-reach and disadvantaged residential customers*	Residential customers (Multifamily- Focus on DAC and HTR communities); Elementary schools that meet CPUC HTR and/or DAC criteria; Small Apartment Buildings: Multifamily apartment buildings with less than 50 units, with owner/residents considered Hard-to-Reach or located in a Disadvantaged Community. Condominium Properties: Complexes with an HOA and/or property management company.	Single-family homeowners and renters Multifamily property owners and tenants Manufactured and mobile home residents Income-qualified households (at or below 250% of the federal poverty level)	*Single Family Residential, Mobile Home, and some in-unit not being treated by multi-family Single Family Residential, Mobile Home, and Multifamily, primarily 2-4 units.*	*Single Family Residential, Mobile Home, and some in-unit not being treated by multi-family Single Family Residential, Mobile Home, and Multifamily, primarily 2-4 units.*	Single Family, Du plex, Townhome, Multifamily low-rise, Alterations, and Accessory Dwelling Units. Single Family Residential, low- to moderate-income households;
Resource or Non-Resource	*Non-Resource*	*Resource & Non-Resource*	Resource and Non-Resource	*Resource*	*Non-Resource/Low-Income*	*Non-Resource (Market Support)* Resource Acquisition
Eligible Measures	*Home audits and energy efficiency DIY kits*	*Including but not limited to; Building Envelope, Service & Domestic Water*	*Direct Install, SF/MF: Heat pump water heater, Refrigerators, Clothes washers,*	*Eligible Measures vary based on programs listed in parameters:*	*Phone-based consultants/ in-person energy assessments*	**Program Requirements (depending on dwelling type):**

		Heating, Appliances, HVAC, HVAC Controls, Lighting, Pool & SPa, Plug Load.. *Direct install: Lighting, HVAC, HVAC Controls, Building Envelope, Service and Domestic Hot Water, Service and Domestic Hot Water (Electrification), Appliance / Plug Load, Pool Heating.*	*Dishwashers, Smart thermostats, Lighting upgrades, Furnace repair/replacement, Duct sealing and testing, Insulation, Air sealing, Pool pump, Power strips, CO and smoke alarms.* *Non-resource: Home energy assessments and recommendations, Incentives for EE upgrades, Community O&E, Home Energy Reports, Digital energy management tools, Online promotion of EE products, GoGreen Financing.*	*Lighting* *Appliances* *HVAC* *Plug Load* *Refrigeration* *Custom* *Lighting Controls* *HVAC Controls* *Whole Building* *Water Heating*	*ESA Main provides both basic and plus measures based on the home energy audits performed* *Appliances: i.e. Refrigerators & High Efficiency Clothes Washers (Plus)* *Domestic Hot Water: i.e. faucet aerators, water heater tank and pipe insulation, low-flow showerheads and water heater repair and replacement (plus)* *Enclosure: i.e. Air sealing (plus), attic insulation (plus), and caulking.* *HVAC: Furnace repair and replacement (plus), heat pump replacement, smart thermostat (plus), duct test and seal (plus).* *Maintenance: i.e. furnace clean and tune, HVAC air filter services, and lifecycle refrigerant management* *Lighting: i.e. LED reflector bulbs, and exterior hard-wired LED fixtures* *Miscellaneous: i.e. Pool pumps (plus), power strips, and CO and smoke alarms Maintenance: i.e. furnace clean and tune, HVAC air filter services,*	-Communicating thermostats Induction cooking Heat pump water heating Heat pump space heating Segregated circuits Install a 240-volt plug for electric vehicle charging infrastructure Battery storage readiness Thermostatic mixing valves Heat Pump Drye — Specific measures are still to be determined. General strategy is to drive comprehensive measure packages including building envelope, heat pump HVAC, heat pump water heaters.

					and lifecycle refrigerant management *Lighting: i.e. LED reflector bulbs, and exterior hard wired LED fixtures* *Miscellaneous: i.e. Pool pumps (plus), power strips, and CO and smoke alarms* *This is not a complete list of all of the measures that PG&E's ESA program provides. For a comprehensive list please see: Energy Savings Assistance (ESA), California Alternate Rates for Energy (CARE), and Family Energy Rate Assistance (FERA) Programs Annual Report Table 2*	
2024 Budget	*$1,141,875*	$12,226,490	*$111,400,775*	*$54,729,989*	*$118,462,500 authorized*	*$12,846,232*
2025 Budget	*$3,745,125*	$11,194,128	*$128,156,229*	*$55,313,330*	*$116,490,789 authorized*	*13,949,284*
2026 Budget	*$3,736,125*	$11,671,201	*$106,059,131*	*$59,396,850*	*$ 114,909,676 Authorized*	*13,950,180*

Commercial Segment Program Summary

Program Parameters	CCR REN [Commercial]	SoCalREN [Small Commercial Direct Install Program, Food Desert Energy Efficiency Equity (FDEEE), Small & Medium Business Energy Advisor (SMBEA)]	SCE [Simplified Savings, Commercial EE, Commercial SEM, CERI, CREST, GRID-MAP, MSP, SPARKe]	SCG [, Small and Medium Commercial EE Program (Resource Acquisition), Commercial-BEST (Resource), Service RCx+ Program, Sustainability Studio, Large Commercial Energy Efficiency Program, Nonresidential Behavioral Program, Business Energy Efficiency Surveys (BEES), CC-Nonresidential Calculated Incentives, CC-Nonresidential Deemed Incentive Program, Small and Medium Commercial EE Program, Strategic Energy Management, Commercial-BEST], Energy Efficiency and Rehabilitation Program, Grid-Responsive Incentive Design Market Access Program (GRID-MAP)	PG&E [AEP HiTech Biotech, HEFI Healthcare Fitness, Measured Savings for Summer Reliability, NetOne Commercial, Simplified Savings Micro & Small Customer
Eligible Customer (s)	Micro, small, and medium commercial customers in hard-to-reach and disadvantaged communities	Small sized Commercial businesses- HTR; Corner stores, small business grocers, food banks, small-scale independent	*Small & Medium Businesses (DAC & HTR), Large Commercial, Customers under 200 kW (for Equity Progs)*	*All commercial*	Commercial sector (micro, small, medium, and large customers), Healthcare, high-tech, and biotech,

		restaurants located in low-income neighborhoods and DACs; small and medium businesses (annual non-coincident peak demand of less than 20kW and less than 200kW respectively).			
Resource or Non-Resource	*Resource*	*Resource & Non-Resource*	*Resource*	*Resource and Non-Resource*	Resource Acquisition
Eligible Measures	*Lighting, domestic hot water, hvac, envelope, controls.*	*Including but not limited to; Lighting, Service and Domestic Hot Water, Service and Domestic Hot Water (Electrification), Commercial Refrigeration, Food Service, HVAC, Appliance of Plug Load, Building Envelope.*	*Lighting, HVAC systems, Refrigeration upgrades, Heatpump WH, Smart thermostats, Bldg envelope improvements, RCx, DR technologies*	*Eligible Measures vary based on programs listed in parameters:* *Lighting* *Appliances* *HVAC* *Plug Load* *Refrigeration* *Custom* *Lighting Controls* *HVAC Controls* *Whole Building* *Water Heating*	*See program details*
2024 Budget	*$63,940*	$3,418,697	*$37,586,336*	*$31,926,018*	*17,089,434*

2025 Budget	*$2,457,927*	$7,733,933	*$62,199,832*	*$30,328,489*	*$ 23,694,480*
2026 Budget	*$2,448,878*	$6,978,516	*$67,883,341*	*$24,377,013*	*22,515,784*

Agriculture Segment Program Summary

Program Parameters	**CCR REN [Agriculture]**	**SoCalREN [Agriculture Project Delivery Program, Rural-HTR Agricultural DI, Agriculture Retrofit,]**	**SCE [AgEE, SEM Ag, SPARKe Ag]**	**SCG [Agriculture Energy Efficiency Program, Nonresidential Calculated Incentives (budget included with Commercial program]**	**PG&E [Agricultural Energy Savings Action Plan (AESAP) Program]**
Eligible Customer (s)	*N/A*	*Small and medium DAC, rural, and underserved Agricultural customers;* *Small to medium Agricultural customers including DAC and HTR customers;* Small and medium Agricultural customers including water agencies and irrigation districts.	*All Ag customers including HTR and DAC involved in Indoor Horticulture, Dairy and Non-dairy production, Irrigated Crops, Cold Storage, Post-harvest Processing*	*Agricultural customers in the SCG territory"*	*All agricultural customers in the PG&E territory*
Resource or Non-Resource	*N/A*	*Resource & Non-Resource*	*Resource*	*Resource*	*Resource*
Eligible Measures	*N/A*	*Including but not limited to;* *Rural-HTR Ag DI Measures: Booster Pump Overhaul, Booster Pump VSD, Evapotranspiration Monitoring and Optimization, Green Houses and Indoor Ag heating, Indoor Ag – Lighting,*	*EE for Agriculture, Audits, Assessment, Technical Assistance, RCx, Deemed and calculated retrofits*	*Appliances* *HVAC* *Plug Load* *Custom* *HVAC Controls*	*EMS, ASD, VentFanMtr, OxyDemCtrl, Boiler_AF, TankIns, MatProcDrv, HeatRecov, GenPurpose, PosDisp, CentBstr, Centrif, Agitation, CentChlr, RefWareCool, RecipComp, Timer, LtSensor, OccSensor, LED_fixt, LED_lamp,*

		Outdoor Area Lighting, Well Pump Overhaul, Well Pump VSD. *Agriculture Retrofit Measures: Barn ventilation, Booster pump overhaul, Booster pump VSD, Evapotranspiration monitoring and optimization, Greenhouse air distribution, Greenhouses condensing boilers, Greenhouse heating envelope measures, Process optimization, Well pump overhaul, Well pump VSD, Greenhouse heat curtains, Pipe insulation, Greenhouse infrared film.*		*Water Heating*	*PipeIns, IrrifSys, Building Envelope*
2024 Budget	*N/A*	*$2,496,267*	*$3,424,382*	*$4,333,333*	*$8,498,660*
2025 Budget	*N/A*	*$5,257,146*	*$3,465,989*	*$3,666,667*	*$12,190,000*
2026 Budget	*N/A*	*$5,604,983*		*$3,630,000*	*$10,460,000*

Public Segment Program Summary

Program Parameters	**CCR REN [Public]**	**SoCalREN [Public Agency Project Delivery Program, Water Infrastructure, Public Agency DER DAC Program (Pathway to Zero), Streamlined Savings Pathway Program, Rural-HTR Public Agency Direct Install Program, Energy Resiliency Action Plan Program, Regional Partner Initiatives, Water and Wastewater SEM Program, Underserved Schools Strategic**	**SCE [Public Energy Performance; Higher Education; Statewide Water/Wastewater Pumping]**	**SCG [Public Small/Medium Public Program, Large Public Program, Regional Energy Pathways]**	**PG&E [Government & K-12 Program]**

		Energy Management (SEM) Program].			
Eligible Customer (s)	*Jurisdictions considered geographically hard-to-reach*	*Cities, Counties, Tribes, School Districts, Community Colleges, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencies;* *Cities, counties, tribes, k-12 school districts, community colleges, public universities, water and wastewater districts, special Districts, federal, and state agencies;* *Public sector customers with municipally owned potable water systems and wastewater treatment plants (WWTP) within SCE's service territory;* *K-12 schools and community colleges in underserved communities.*	*Municipal, County, Federal, Tribal, Private Universities/Trade Schools, UC and Community Colleges, Water and Wastewater*	Local Governments, Public Agencies, Special Districts, K-12 Schools	Local Governments, Public Agencies, Special Districts, K-12 Schools not exclusive to, but including Equity customers.
Resource or Non-Resource	*Non-Resource*	*Resource & Non-Resource*	*Resource*	*Resource*	Resource Acquisition
Eligible Measures	N/A	*Including but not limited to; Water Heating, HVAC, HVAC Controls, Lighting, Food Service Electrification, Process Improvements, Water Systems,*	*SEM, RCx, Lighting, HVAC, Kitchen equipment, Water production equipment, Wastewater treatment equipment.*	*Eligible Measures vary based on programs listed in parameters:* *Appliances*	HVAC, Lighting and controls, Retrocommissioning, behavioral strategies

		Building Envelope, Appliances, Plug Load.		*HVAC* *Plug Load* *Custom* *HVAC Controls* *Water Heating*	
2024 Budget	*$266,960*	$16,567,713	*$4,582,667*	*$7,405,950*	$11,202,276
2025 Budget	*$298,125*	$20,996,936	*$8,839,997*	*$6,907,367*	$10,300,000.00
2026 Budget	*$299,700*	$24,640,321	*$12,121,705*	*$6,588,615*	$10,300,000.00

Workforce Education and Training Segment Program Summary

Program Parameters	**CCR REN [WE&T]**	**SoCalREN [ACES Pathway, Green Path Careers, WE&T Opportunity HUB, Agriculture WE&T, E-Contractor Academy]**	**SCE [IEET]**	**SCG [WET&O-Integrated Energy Efficiency Training, WET&O-HERS Rater Training Advancement, WET&O-Energy Program Outreach, WET&O-Educational Outreach Program]**	**PG&E [WE&T Integrated Energy Education and Training]**	**SW WE&T Career and Workforce Readiness (CWR)**	**SW WE&T Career Connections (CC)**

Eligible Customer (s)	*Hard-to-reach and disadvantaged communities and at-risk youth*	*At-risk youth and adults who are not pursuing higher education by attending college.* *HTR and DAC in the Southern California Region in the quest to reducing the labor shortage in EE and construction fields.* *Small to Medium Ag Customer including DAC and HTR Ag customers. This includes Small Business Customers, Severely Disadvantaged Communities (SDACs), and Socially Disadvantaged Farmers and Ranchers.* *Small and diverse contractors in DAC and HTR areas*	*Incumbent energy efficiency, electrification, and decarbonization workforce across agriculture, foodservice, commercial, industrial, and residential sectors*	*Residential and Commercial*	Incumbent and emerging workforce	Disadvantaged Workers	K-12 Students
Resource or Non-Resource	*Non-Resource*	*Non-Resource*	*Non-Resource*	*Non-Resource*	~~Non-Resource (Market Support)~~	~~Non-Resource~~ (Equity)	Non-Resource (Market Support)

Eligible Measures	*N/A*	*N/A*	*Training and education programs, energy measurement tool loans, collaborations with community colleges*	*n/a*	*n/a*	*n/a*	
2024 Budget	*$755,625*	$2,434,600		*$7,059,790*	~~$8,734,790~~		
2025 Budget	*$3,191,510*	$2,547,400		*$7,108,202*	$8,750,012		
2026 Budget	*$3,164,732*	$2,650,800		*$7,703,037*	$8,368,331		

Codes and Standards Segment Program Summary

Program Parameters	**CCR REN [C&S]**	**SoCalREN [Program]**	**SCE [Compliance Improvement, Reach Codes, Planning and Coordination]**	**SCG [N/A]**	**PG&E Compliance Improvement**
Eligible Customer (s)	*Public and private sector building professionals in geographically hard-to-reach and disadvantaged communities*	*N/A*	*Local Government, Building officials, Code enforcement agencies*	*N/A*	Market actors throughout the building industry supply chain, including: architects, designers, energy consultants, plans examiners, building inspectors and various trades

Resource or Non-Resource	Non-Resource	*N/A*	*Non-Resource*	*N/A*	Non-Resource (C&S)
Eligible Measures	*N/A*	*N/A*	*Energy Code Ace, Training for T24 Part 6, T24 Part 11, Title 20*	*N/A*	*n/a*
2024 Budget	*$584,400*	*N/A*			*$5,450,000*
2025 Budget	*$792,000*	*N/A*			*$5,956,798*
2026 Budget	*$787,730*	*N/A*			*$5,956,798*

Finance Segment Program Summary

Program Parameters	**CCR REN [Finance]**	**SoCalREN [Public Agency Revolving Loan Fund (Revolving Savings Fund)]**	**SCE [On-Bill Financing, GoGreen Financing]**	**SCG [On Bill Financing]**	**PG&E [Program]**
Eligible Customer (s)	Micro, small, medium commercial business owners and homeowners/renters in HTR and DAC communities	*Cities, Counties, Tribes, School Districts, Community Colleges, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencies; Rural-HTR Agriculture Finance Assistance Program;* *Small to Medium Ag Customer including DAC and HTR Ag customers. This includes Small*	*Non-residential customers in the Commercial, Industrial, Agricultural, and Public Sector market segments.*	*Commercial Customers*	OBF: Non-residential customers in the micro, mid, small, mid-size and public sector. GoGreen:Residential customers through GoGreen Home.

		BusinessCustomers, Severely Disadvantaged Communities (SDACs), and Socially Disadvantaged Farmers and Ranchers.			
Resource or Non-Resource	*Non-Resource*	*Non-Resource*	*Non-Resource*	*Non-Resource*	*Resource / Non-Resource* Non-Resource (Market support)
Eligible Measures	*N/A*	*N/A*	*Programs offer zero percent financing, Credit enhancements, Scalable leveraged financing*	*n/a*	For OBF - All energy efficiency measures currently listed in our catalog which may include, lighting, heating, ventilation, etcetera. Additionally Battery Storage and EV Charging Infrastructure For GoGreen Financing (residential and Business): Most clean energy technologies including energy efficiency, EV charging equipment, and solar/Storage
2024 Budget	-	$900,000	*$2,879,765*	*$505,740*	OBF $60,000,000
2025 Budget	-	$1,073,000	*$3,541,773*	*$512,250*	OBF $55,000,000

					GGF: $4,000,000 in credit enhancements
2026 Budget	*$350,851*	$1,124,800	*$3,763,607*	*$520,469*	Estimated: OBF: 60,000,000 GGF: $4,000,000 in credit enhancements