



**Central California Rural Regional
Energy Network**

Residential Equity Program Implementation Plan

Program Administrator: Central California Rural Regional Energy Network

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PROGRAM OVERVIEW

The Central California Rural Regional Energy Network (CCR REN) Residential Equity Program (REP) provides energy efficiency surveys and simple EE measures to residential customers. This program primarily serves customer groups identified and defined by the California Public Utilities Commission (CPUC) as hard-to-reach (HTR) or located in CPUC-defined Disadvantaged Communities (DAC) or Underserved Communities (Underserved). These customers are collectively called Equity customers within CCR REN's territory.

REP connects rural residential communities to EE opportunities through targeted outreach, education, and technical assistance, focusing on customer groups in the region who often face higher energy burdens than non-rural groups in milder climates, including agriculture, hospitality, healthcare workers, and retirees. The program aids rural 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 Central California Rural REN programs as well as external programs and resources to support the implementation of energy efficiency.

TABLE 1: PROGRAM BUDGET AND SAVINGS

Program Budget and Savings			
1	Program Name		Residential Equity Program
2	Program ID Number		CCR-RES-001
3	Program Provider		Rising Sun Center for Opportunity under contract to CCR REN
4	Portfolio Administrator		CCR REN
5	Program Implementer Type		REN
6	Portfolio Segment		Equity
7	Total Program Budget		\$12,363,750
8	Program Budget by Year	2024	\$1,141,875
		2025	\$3,745,125
		2026	\$3,736,125

Program Budget and Savings			
		2027	\$3,740,625
9	Program Duration		3/1/ 2025 – 12/31/ 2027
10	Total System Benefit (TSB)	Total	NA
11	TSB by Program Year	2024	NA
		2025	NA
		2026	NA
		2027	NA
12	CO ₂ e	Lifecycle Net	NA
		First year Net	NA
		Lifecycle Gross	NA
		First Year Gross	NA
13	KW	Net	NA
		Gross	NA
14	KWh	Net Lifecycle	NA
		Net (First Year)	NA
		Gross (First Year)	NA
15	Therms	Net Lifecycle	NA
		Net (First Year)	NA
		Gross (First Year)	NA
16	Program Cost Effectiveness: Total Resource Cost (TRC)	2024	NA
		2025	NA
		2026	NA
		2027	NA
		Total	NA
17	Program Cost Effectiveness: Program Administrator Cost (PAC):	2024	NA
		2025	NA
		2026	NA
		2027	NA

Program Budget and Savings			
		Total	NA
18	Market Sector(s)		Residential
19	Program Type		Non-Resource
20	Delivery Type(s)		Downstream

IMPLEMENTATION PLAN NARRATIVE

1. PROGRAM DESCRIPTION

The Residential Equity Program (REP) provides energy efficiency services to rural, hard-to-reach, underserved, and disadvantaged residential customers within CCR REN's territory. REP serves a unique dual purpose in providing local, disadvantaged youth with paid work experience while delivering meaningful energy savings opportunities to customers with a high energy cost burden and limited EE opportunities compared to residents in more urban areas of California. The program helps customers reduce household energy and water use through in-home and virtual energy surveys, energy education, do-it-yourself (DIY) EE kits, and direct installation of simple EE measures. The specific services offered are described in further detail in subsequent sections of this Implementation Plan.

2. PERFORMANCE TRACKING

Program performance is quantified and tracked by the number of customers served with In-Home Green House Calls, Virtual Green House Calls, and the percentage of participating customers qualified as hard-to-reach, disadvantaged, or underserved. Table 2 below presents CCR REN's key targets and associated numeric values to quantify and track program progress and success.

Table 2: Key Program Metrics

Program Year	In-Person Green House Calls	Virtual Green House Calls	% Equity Customer Participation
2024	0	0	0
2025	800	1,200	75
2026	1,200	1,800	75
2027	1,600	2,800	75
Totals	3,600	5,800	75

Additional program metrics and indicators are tracked to monitor program performance, including:

- Outreach events
- In-home customer signups/waitlists
- Phone consultations
- Virtual surveys (limited option for Central Coast region)
- In-home appointment eligibility and scheduling
- Participant demographics, home assessment data, and measure installations
- Customer follow-up calls
- Measure inventory

3. PROGRAM DELIVERY AND CUSTOMER SERVICES

SERVICES OFFERED

- Green House Call: In-home energy assessments and installation of simple EE measures
- Virtual Green House Call: A DIY EE kit with simple energy and water saving measures, to be installed by the resident (no tools or special skills required) followed up by a phone call to coach the resident on the installation of the measures, if needed. In a portion of the Central Coast Region, Virtual Green House Call customers can also access an online app that models the energy use of their home, makes recommendations for energy efficiency and zero net energy

measures, and provides general energy education tailored to the home. The app is promoted in conjunction with the Virtual Green House Call for these customers.

All services are provided by youth Energy Specialists employed by program provider Rising Sun Center for Opportunity under contract to CCR REN. Youth Energy Specialists are trained and certified through CCR REN's Workforce Education and Training Program called Climate Careers (see CCRREN-WET-001 for more information about the training and development of youth Energy Specialists.) Referrals are made for other applicable programs including the Energy Savings Assistance (ESA) program and EE or IDSM programs offered by other Program Administrators (PA).

IN HOME GREEN HOUSE CALLS

A pair of energy specialists visits three to five households a day, depending on the size of the home and the availability of appointments. During these in-person Green House Calls, energy specialists perform a whole-home walkthrough assessment, install energy and water-saving measures, and educate customers on additional ways to save energy. They also inform homeowners about other EE programs, including the available IOUs' low-income Energy Savings Assistance programs. All household characteristics and services provided are recorded in a mobile app during this in-home service.

Grassroots outreach is a core tactic of the program, leveraging strategic relationships with other community-based organizations and local governments, social media campaigns, and, first and foremost, a boots-on-the-ground approach in targeted communities. Starting typically in Spring, program outreach staff spend time recruiting customers, attending community events, tabling, and working with local partners to customize strategies to local needs. Outreach staff attend holiday festivals, health fairs, farmer's markets, food banks, senior centers, public libraries, neighborhood councils, YMCAs, local city council meetings, parent-teacher associations, local sustainability symposiums, and more.

This activity is supplemented by online marketing and direct mailers to help reach customers in more remote areas or with conflicting work/school schedules. This marketing can include E-newsletters, targeted online advertising, social media, podcasts, and other digital communications. Messaging highlights various benefits, depending on the audience, and may focus on comfort, the fact that the program is at no cost, the community/youth benefit, saving on utility bills, or helping the environment. All

collateral is of professional quality and is provided in multiple languages. Communication is further enhanced when the program can be coordinated and co-branded with local agencies to build additional trust.

VIRTUAL GREEN HOUSE CALLS

Outreach strategies for Virtual Green House Calls (EE kits) are similar to and can overlap with In Home Green House Call outreach. EE kit outreach methods include in-person events, direct distribution events with local partners, online and social media, mailers, and other methods based on the location. Educational and outreach materials are tailored to the regions and offered in multiple languages, depending on local demographics. EE kits will be available to customers in the San Joaquin Valley region who do not live in a city hosting an in-person site office and therefore can't be reached by Energy Specialists for an in-person Green House Call. Customers who live in a community with a site office but aren't served during the summer or who sign up after the summer can also receive a virtual kit. Customers sign up for EE kits at community outreach events or online, completing a survey that helps us determine eligibility and the most appropriate kit for the customer's household. Customers without internet access or needing assistance receive a phone call to complete the survey. Kits are then assembled and mailed during the Fall to all eligible customers. All customers receiving an in-person or virtual Green House Call receive a follow-up report with additional energy-saving tips and resources. EE kit customers also receive a follow-up phone call from a program staff member or youth Energy Specialist after their kit is delivered, during which customer feedback is collected and any questions they may have about the kit are answered.

Sign-ups for kits also include an optional virtual home energy assessment. This assessment provides customized recommendations and models the potential impact on energy use/cost of zero-net energy strategies. Information about the customer's home is collected from the customer either when the survey form is completed, or during follow up phone calls. This helps to refine the virtual assessment model. Virtual assessments are available in the CCR REN's Central Coast region, with expansion to other CCR REN areas being considered for the 2028-2031 funding cycle.

REGIONAL AVAILABILITY OF SERVICES AND SCHEDULE

In 2025, In-Home Green House Calls are offered in four of nine San Joaquin Valley counties and eventually will be offered in all nine SJV counties in 2026. Virtual Green House Calls will be available to residents throughout the CCR REN region, beginning in 2025 with the SJV counties that also have In Home Green House Call site offices and services. In the second half of 2026, Virtual Green House Calls will be available in the Central Coast and Eastern Sierra regions.

PROGRAM TIMELINE

REP conducts residential outreach primarily from January to August every year. Green House Call services run from August to October. From November through December, program activity includes reporting, program improvement, and program planning. The program also spends each year building knowledge of and partnerships with the counties and communities to be served the following year.

PLANNED COORDINATION

The Residential program coordinates with the other Portfolio Administrators' (PAs) programs as outlined in the Joint Coordination Memorandum agreed upon by the CCR REN and other Portfolio Administrators. Overlap and duplication of measures with other programs the customer may be eligible for, such as the Energy Savings Assistance program are addressed as follows:

- Customer's IOU account number is checked in the database against income-qualified program eligibility. If eligible for income qualified programs, customer information would be relayed to the IOU PA.
- The customer may self certify income and household size in the REP intake form. If the customer appears to meet basic eligibility requirements of the income-qualified program, customer is referred to the IOU PA, with the customer's permission.
- Existing measures in the home are verified during the Green House Call and/or survey and if an efficient option is already installed and operational, the equivalent REP measure is not installed (e.g. an LED lamp is only installed by the REP Green House Call if the existing lamp is incandescent or fluorescent)
- If measures are installed by REP, then REP supplies customer information and a measure installation report to the other PA and the other PA's program may provide additional applicable measures, without duplicating REP Green House Call measures.

4. PROGRAM DESIGN AND BEST PRACTICES

REP employs locally trained workers from CCR REN's Climate Careers program (CCR-WET-001). This close coordination represents an innovative and effective approach that provides jobs for economically disadvantaged youth while offering needed energy efficiency education, conducting energy assessments and installing simple EE measures for residential customers in rural areas that have historically been underserved by traditional programs. Table 4 below summarizes specific program strategies and tactics aimed at reducing market barriers for this customer group.

Table 4: Barriers, Strategies, and Tactics

Barrier(s)	Strategy	Tactic
Geographic remoteness and capacity to act	Localize program services	<ul style="list-style-type: none"> Coordinate with CCR REN Partners and mission-aligned organizations Hire and train in-community youth Leverage elected and appointed officials to build trust Deploy a virtual audit platform
Lack of awareness or trust in energy program services	Prioritize existing relationships and mission-aligned organizations	<ul style="list-style-type: none"> Leverage relationships with CCR REN partners, elected officials, and community-based organizations to generate short- and long-term program opportunities Leverage community-based organizations (CBOs), economic development commissions, faith-based organizations (FBOs), and other local utility providers Leverage all funding that can be stacked on behalf of participants: Local, State, and Federal
	Meet participants where they are	<ul style="list-style-type: none"> Hire and train in-community youth Partner with trusted local trained experts to connect with decision-makers, increase customer trust, and reduce costs Have program documentation in multiple languages. Implement a full-service turn-key approach – REP offers a one-stop shop, offering the energy assessment and EE measures in one in-home visit.
Limited funding and risk aversion	Instill customer confidence	<ul style="list-style-type: none"> Work done by local youth, with the endorsement of recognized agencies and local governments Provide do-it-yourself EE kits.

LESSONS LEARNED AND BEST PRACTICES

REP draws on the lessons learned and best practices from the CCR REN and Rural Hard to Reach Working Group, which have been developed over the last eight years. These are combined with the deep insights of program provider Rising Sun Center for Opportunity, which has over 15 years of experience designing, implementing, and refining energy programs serving equity communities. Table 5 below outlines some of these key lessons learned and best practices.

Table 5: Lessons Learned and Best Practices

Lesson Learned	Best Practice
Providing in-person services to rural customers across a large area can be cost-prohibitive	Hire and train in-community program resources that can be deployed locally and regionally to reduce transaction costs.
Meeting the customer where they are	Ensure that program communications account for varying community values and beliefs.
No-cost offerings from a new program create barriers based on a lack of awareness.	Legitimize offerings through the opinion leadership of local organizations, in-community hires, advocates, and elected or appointed officials.
Electrification measures save energy but may increase the customer's monthly electric bill.	Ensure customers are fully educated about the cost impacts of electrification and provide additional measures to offset any projected first-year cost increases.

KEY SOFTWARE APPLICATIONS

Table 6 lists and describes software solutions used in the Residential Program.

Table 6: Key Software Applications and Descriptions

Software	Description
CCR REN CRM	System of record for all CCR REN activities, including REP for participation and compliance reporting.
Box / SharePoint	Cloud-based storage that meets data security requirements.
Salesforce Field Service	<ul style="list-style-type: none">• Outreach event tracking• Green House Call customer signups/waitlists• EE kit surveys and orders• Green House Call appointment eligibility and scheduling• Green House Call visits: resident demographics, home assessment data, and measure installations• Customer follow-up calls• Measure inventory• Energy and water savings reporting• Youth and seasonal staff recruitment/onboarding• Youth demographics and surveys• Overall contact management• Reporting• Desktop and mobile apps used in program
Xerohome	Virtual audit platform

5. INNOVATION

Not applicable. The offering is not an IOU third-party program.

6. PILOTS

Not applicable.

7. WORKFORCE EDUCATION AND TRAINING

Not applicable.

8. WORKFORCE STANDARDS

Not applicable.

9. DISADVANTAGED WORKER PLAN

The RES program is coordinated closely with CCR REN's Workforce Education and Training (WET) program (CCR-WET-001), which trains local disadvantaged workers and creates career opportunities for them.

See the Implementation Plan for CCR-WET-001 for a detailed description of how it improves Disadvantaged Workers' access to career opportunities in the EE industry and the method for tracking this population to satisfy metric reporting requirements.

10. MARKET ACCESS PROGRAMS

Not applicable.

11. ADDITIONAL INFORMATION

Not applicable.

SUPPORTING DOCUMENTS

1. PROGRAM MANUALS AND PROGRAM RULES

The following sections delineate the CCR REN's Residential Equity Program (REP) eligibility requirements and rules.

1.1 ELIGIBLE MEASURES

REP offers a prescribed set of energy and water-saving measures designed to deliver customer benefits of energy and water cost savings and increased comfort and service. All measures and services are provided to the customer at no cost. The measures offered include:

- Efficient faucet aerators - bath and kitchen
- Efficient showerheads
- LED lightbulbs - flood and globe; up to 1 smart bulb
- LED nightlight
- Tier 2 advanced power strip or smart plug
- Foam outlet gaskets
- Foam tape weatherstripping
- Toilet leak detection test
- Educational materials and resources

In 2025, and for a limited number of customers, portable, tabletop induction cooktops and induction cookware are provided at no cost to interested customers to help them recognize the benefits electrification can offer.

1.2 CUSTOMER ELIGIBILITY REQUIREMENTS

Customer eligibility requirements focus on the following factors:

- Customer resides in single family or multifamily housing
- Utility service is provided by PG&E, SCE, and/or SoCalGas
- Location is within CCR REN partner territories: AMBAG, HSEF, or SJVCEO
- Meets hard-to-reach, disadvantaged, or underserved criteria¹
- Has the authority to allow the program provider to install, or to self-install, simple energy and water savings measures in the home

¹ Non-equity categorized customers in the region that meet other eligibility criteria may be served in limited quantities.

REP Energy Specialists work closely with each prospective participant to ensure that program eligibility requirements are understood and met and that information necessary to determine eligibility is documented in the program database.

1.3 CONTRACTOR ELIGIBILITY REQUIREMENTS

Not applicable. The program does not utilize contractors to deliver the program.

1.4 UPSTREAM AND MIDSTREAM PARTNERS

Not applicable.

1.5 ADDITIONAL SERVICES

Not applicable.

1.6 AUDITS

The CCR REN REP program conducts energy assessments as part of each Green House Call. The assessments confirm customer eligibility and identify EE opportunities covering key energy systems, including water heating, appliances, HVAC, and lighting. They are intended to educate and appropriately document EE opportunities.

1.7 PROGRAM QUALITY ASSURANCE PROVISIONS

Quality assurance and controls are integrated into the program design. At the time of service, the program provider's contact information is provided in case the participant has concerns or questions. Every program participant is also given a feedback card with pre-paid postage that they are asked to complete and mail back to the program implementer. All feedback is reviewed closely to address concerns about employees, measures, and the service experience in general. As a quality control measure, implementer program managers or assistants conduct random drop-ins during the in-home visits. The drop-ins are a check and balance system that confirms employees provide a high-quality service.

The following steps are taken to verify participation in the program and ensure that program services are received.

- Customer Eligibility: IOU account verified
- Customer Demographics: Record from intake survey form HTR, Underserved, Disadvantaged attributes.
- Virtual Green House Calls: Confirm EE Kits were received by the participant through a follow-up phone call.

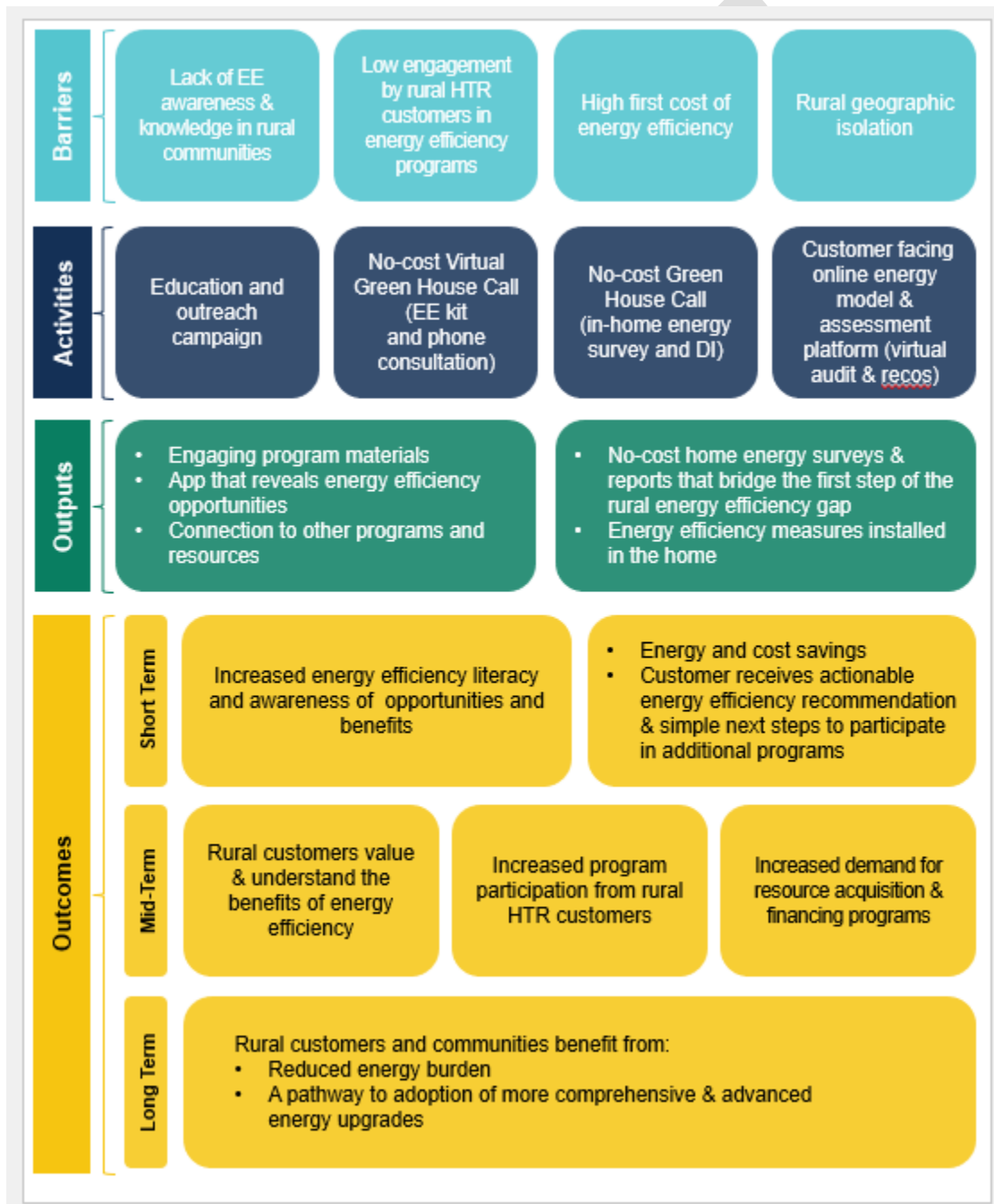
- In-Home Green House Call: Confirm services were received by the participant through a follow-up phone call and/or drop in visit

1.8 OTHER PROGRAM METRICS

Not applicable.

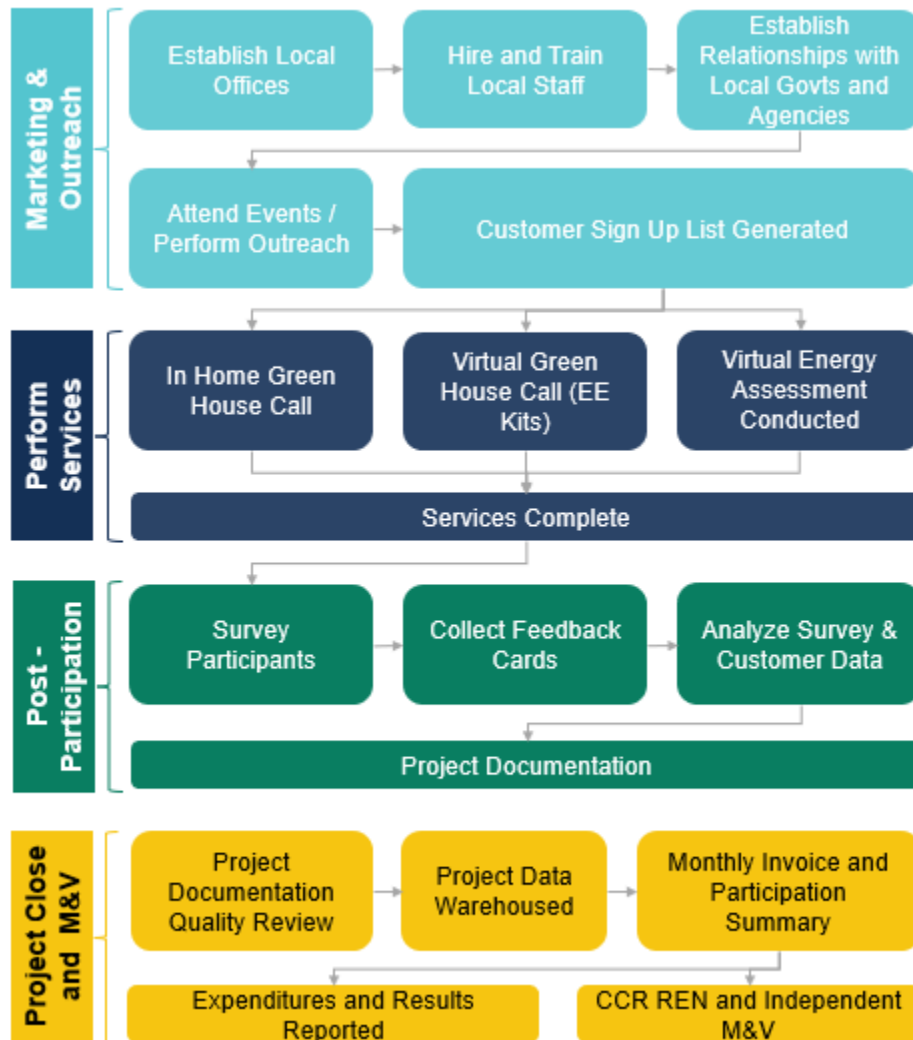
2. PROGRAM THEORY AND PROGRAM LOGIC MODEL

Figure 1: Program Theory and Logic Model



3. PROCESS FLOW CHART

Figure 2: WET Program Process Flow Chart



4. MEASURES AND INCENTIVES

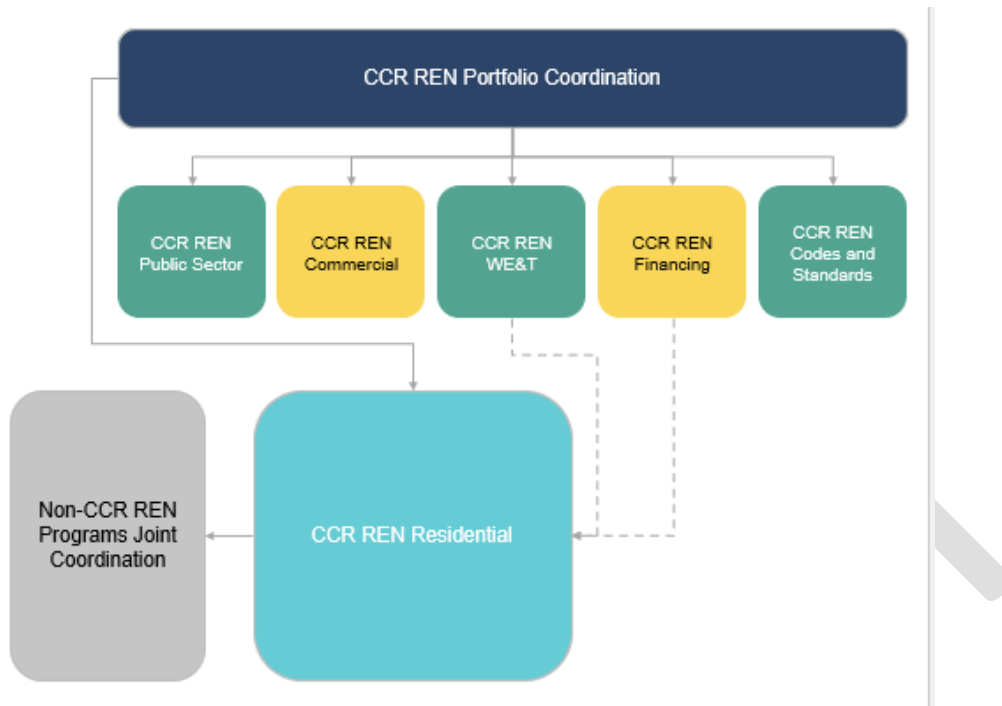
Table 7 lists the EE measures typically provided in the Virtual Green House Call EE kits and/or installed by Energy Specialists during the In-Home Green House Call.

Table 7: Measures, Measure Packages, and Incentive Levels

Measure	Workpaper	Incentive
Efficient faucet aerators - bath and kitchen	SWWH001-05	Full Cost
Efficient showerheads	SWWH002-05	Full Cost
LED lightbulbs - flood and globe; up to 1 smart bulb	NA	Full Cost
LED nightlight	NA	Full Cost
Tier 2 advanced powerstrip or smart plug	NA	Full Cost
Foam Weatherstrip Tape	NA	Full Cost
Foam outlet gaskets	NA	Full Cost
Toilet leak detection test	NA	Full Cost
Portable, tabletop induction cooktop w/ cookware	NA	Full Cost

5. DIAGRAM OF PROGRAM LINKAGES

Figure 3: REP Program Linkages Diagram



6. PROGRAM MEASUREMENT & VERIFICATION (M&V)

SJVCEO, CCR REN's assigned program Quality Control lead, consults with the program provider to review the completed work monthly, quarterly, and annually.

Table 8: General M&V Timeline

Timeline	Action
Monthly	Meet with the program lead to review program progress, discuss emerging barriers, and implement corrective actions as needed
Quarterly	Review data trends no less than quarterly and implement corrective actions as needed
	Review project documentation for completeness
	Review participant demographics
Annual	Review final data and achievement of goals. Plan and implement corrective actions for the next program year.

DATA COLLECTION STRATEGIES

REP uses a secure database and file transfer protocol to store and share all project information, ensuring accurate reporting of program data.

PERFORMANCE METRICS

Performance metrics and goals are described in the program Implementation Plan and are available for program evaluators to use.

INDEPENDENT EVALUATION

CCR REN collects the necessary data to support future independent evaluation and ensures that the requested data is provided promptly.

DEEMED JUSTIFICATION

Not applicable.

7. NORMALIZED METERED ENERGY CONSUMPTION (NMEC) PROGRAM M&V PLAN

Not applicable.

8. MULTI-DER IDSM PILOTS

Not applicable.

9. SEM PROGRAMS ONLY

Not applicable.