

SoCalREN ANNUAL REPORT



2023
PROGRAM YEAR

SoCalREN 





Mammoth Lakes Mono County

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Acronyms

ACES	Architecture, Construction and Engineering Students	HPWH	Heat Pump Water Heater
ACSI	American Customer Satisfaction Index	HTR	Hard-to-Reach
AMP	Account Management Post-Construction	IOU	Investor-Owned Utility
ARRA	American Reinvestment and Recovery Act	IRA	Inflation Reduction Act
BAA	Buy American Act	LAUSD	Los Angeles Unified School District
BECC	Behavior, Energy, and Climate Change	MUD	Multi-Unit Dwelling
BMCTA	Benchmarking Call to Action	NMEC	Normalized Metered Energy Consumption
CaISHAPE	CA Schools Healthy Air, Plumbing and Efficiency Program	OBF	On-Bill Financing
CEC	California Energy Commission	PDP	Project Delivery Program
CEDARS	California Energy Data and Reporting System	POA	Property Owner Agreement
CPUC	California Public Utilities Commission	RAS	Renew America's Schools
DAC	Disadvantaged Communities	RSF	Revolving Savings Fund
DER	Distributed Energy Resource	SCE	Southern California Edison
DOE	Department of Energy	SEM	Strategic Energy Management
EE	Energy Efficiency	SoCalREN	Southern California Regional Energy Network
EECBG	Energy Efficiency Conservation Block Grant	SW WISE™	Statewide Water Infrastructure and System Efficiency™ Program
ESCOs	Energy Services Companies	TSB	Total System Benefit
GHG	Greenhouse Gas	UVMs	Unique Value Metrics
GPC	Green Path Careers	WE&T	Workforce Education and Training
GWP	Global Warming Potential		



Whittier Los Angeles County

BACKGROUND INFORMATION

The Southern California Regional Energy Network (SoCalREN) provides energy efficiency (EE) programs and services to customers of Southern California Edison (SCE) and/or Southern California Gas Company (SoCalGas) in an area encompassing all or portions of 13 counties and with a population of more than 20 million people. SoCalREN is administered by the County of Los Angeles Internal Services Department (ISD) Energy and Environmental Service (EES).

In Decision (D.) 12-11-015, the California Public Utilities Commission (CPUC) authorized SoCalREN to:

1. Provide services that complement and supplement Investor-Owned Utility (IOU) programs and/or fill gaps in the market to maximize opportunities for residents, businesses, and public agencies.
2. Provide programs and services to Hard-to-Reach (HTR) markets that the IOUs are not serving.
3. Pilot new, innovative approaches to programs that can potentially scale and offer an avenue to greater energy savings.

SoCalREN has sought to deliver these results while conforming to guidance provided in Rulemaking (R.) 13-11-005, Decision (D.) 15-10-028, D. 18-05-041, D. 19-12-021, D.21-05-031, and D. 23-06-055, among other CPUC Decisions and Rulings.

SoCalREN submits this annual report in compliance with D. 21-05-031 and other CPUC Decisions. D.21-05-031 adopted many of the proposed reforms discussed in the (April 24, 2020) Natural Resources Defense Council's (NRDC) Motion Seeking Commission Ruling And Comment Period On The California Energy Efficiency Coordinating Committee (CAEECC) Proposal, among them requirements for portfolio administrator

annual reports. Among other adopted reforms, going forward annual reports “will include sufficient detail on portfolio, sector, and program-level annual and cumulative accomplishments, including data on savings, budget, C/E [cost-effectiveness], and other approved metrics to ensure accountability and public input on the progress of portfolio performance. The Annual Report will also present a prospective overview in narrative format...”. This annual report satisfies these requirements.

In this report, we present the results of the programs offered by SoCalREN during the 2023 program year. All claimed energy savings are recorded in the California Energy Data and Reporting System (CEDARS). Environmental impact equivalencies noted throughout were calculated using the U.S. Environmental Protection Agency’s Greenhouse Gas Equivalencies Calculator¹.

¹ <https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator>



Santa Paula Ventura County

PORTFOLIO OVERVIEW

As SoCalREN begins its second decade of serving Southern California communities, its focus remains on the rapid deployment of solutions, technologies, and education that directly support the achievement of California’s clean energy goals. Programs offered in 2023 delivered significant impacts, prioritizing benefits to underserved communities.

DELIVERING Climate and Energy Impacts



10,690,142
kWh Savings



690
kW Savings



282,172
Therms Savings



8,961
MTCO_{2e} GHG Avoided

BUILDING Energy Capacity and Economic Resilience



150
Completed Projects
300+
Jobs Supported



\$5,899,529
Total Incentives Paid



\$944,486
Estimated Annual Energy Cost Savings

EXPANDING Access to Energy Efficiency



8,000+
Students Introduced to Energy Efficiency



300+
Courses Completed by Diverse Contractors



48
Regional Workforce Alliance (RWA) Members

A total of 150 buildings, including 120 public facilities including libraries, schools, and senior centers and 30 multifamily properties region received energy efficiency improvements, services, and technical support through SoCalREN’s programs. SoCalREN also supported workforce development efforts through the delivery of a comprehensive Workforce Education and Training (WE&T) program that supported students, workers, and employers in preparing for the clean energy transition.

Sample demonstrative success stories and a description of key portfolio-wide initiatives are provided below. Subsequent sections of this report provide specific details on strategies and activities by sector and program, as well as a brief look ahead to planned activities for 2024. All required program reporting data is recorded in companion Excel files as described in Appendix A: SoCalREN Portfolio Supporting Data.

✓ Irvine Ranch Water District has been a SoCalREN enrollment target for the past seven years. The District was responsive to this year’s outreach attempts and SoCalREN’s newer offerings and enrolled in 2023.

2023 Community Impact Highlights

Delivering Energy Efficiency Education in Mono County

The High Sierra Energy Foundation has been a strong advocate for SoCalREN’s programs and initiatives, bringing the Kits for Kids Program to **Mammoth Lakes Elementary School** and neighboring Lee Vining Elementary School in 2023. Both schools are situated in rural, hard-to-reach areas that are consistently excluded from energy efficiency programs. Working with SoCalREN Kits for Kids allowed nearly 40% of Mammoth Lakes and Lee Vining students to participate in a fun, STEM-focused learning activity—and take energy efficiency home through the no-cost energy savings kit.

Figure 1. Kits for Kids in Mono County



Santa Ana Health Care Agency Upgrades

The County of Orange worked with SoCalREN's Metered Savings Program to complete an interior lighting upgrade, a boiler lockout update, and HVAC system scheduling for their healthcare facility in **Santa Ana**. Through the Metered Savings Program, Orange County was able to save 368,670 kWh annually and garner \$37,481 in incentives.

Figure 2. OC Health Care Agency in Santa Ana



Growing Multifamily Contractor Base Drives Deeper Savings in DACs

In 2023 the SoCalREN Multifamily team focused on recruiting new contractors and helping all participating contractors pivot to projects built around decarbonization, rather than lighting replacement measures. Contractors embraced the change and delivered projects with deeper savings per community and resident unit than in prior years. A total of 25 contractor companies were enrolled in the SoCalREN Multifamily program, a nearly 40 percent increase over 2022 participation. These contractors completed projects in communities from **Upland** to **Ontario** and **Lomita** to **Twentynine Palms**, with more than 60 percent of 2023 projects located in DACs.

Figure 3. Multifamily Program Contractor at Project Site



\$550,000+ Incentive for San Bernardino Municipal Water District

SoCalREN offers financial analyses to help agencies evaluate the economic viability of projects and provides application support to help agencies obtain the incentives or financing they need to make their projects a reality. In 2023, SoCalREN helped **San Bernardino Municipal Water District** receive the largest ever incentive issued through the legacy Statewide Water Infrastructure and System Efficiency™ Program (SW WISE™). With support from both SoCalREN and SW WISE™, the district received more than \$550,000 in incentives for their work on an enhanced aeration controls upgrade at the agency’s wastewater treatment plant.

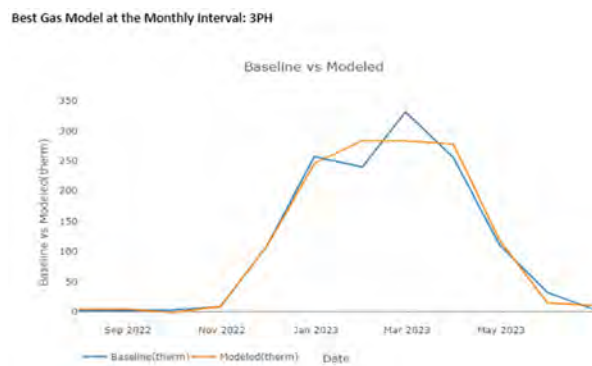
Figure 4. San Bernardino MWD Incentive Check Ceremony



NMEC Success in Ventura County

Blanchard/Santa Paula Library District’s whole building project in Ventura County was the first gas model approved through the Metered Savings Program.² This is a standout success because NMEC programs have had a historically difficult time getting gas data to pass the NMEC Rulebook’s³ modeling criteria. This project included gas/electric HVAC units with electric heat pumps, so it was imperative that the engineering team had a successful gas model to be able to measure against during the reporting period.

Figure 5. Blanchard/Santa Paula Library District Gas Model



² The Metered Savings Program is discussed in the Public Sector section of this report.

³ Rulebook for Programs and Projects Based on Normalized Metered Energy Consumption, Version 2.0.

✓ SoCalREN re-engaged the City of Chino after years of intermittent contact by connecting in person at the Spring AWWA CA/NV Conference in April 2023. Chino then enrolled in July 2023.

Inaugural Future Green Leaders Summit

The 2023 Future Green Leaders Summit was a full-day, professional conference-format event held on March 15, 2023 at the Los Angeles Convention Center that aimed to create interest and excitement among middle school students regarding clean energy careers. The event was designed to provide inspiration for students to gain further education and consider future options. More than 1,800 students and educators attended the event.

Figure 6. Welcoming Future Green Leaders



Portfolio-Wide Initiatives

In addition to the program-specific activities conducted by SoCalREN, SoCalREN advanced a number of portfolio-wide initiatives designed to advance the overall success and efficiency of SoCalREN in using ratepayer dollars to benefit homes, businesses, and communities, delivering progress toward state clean energy goals. Key portfolio-wide initiatives are described at a high level below. Specific activities related to the implementation of these initiatives within program implementation are described throughout this report.

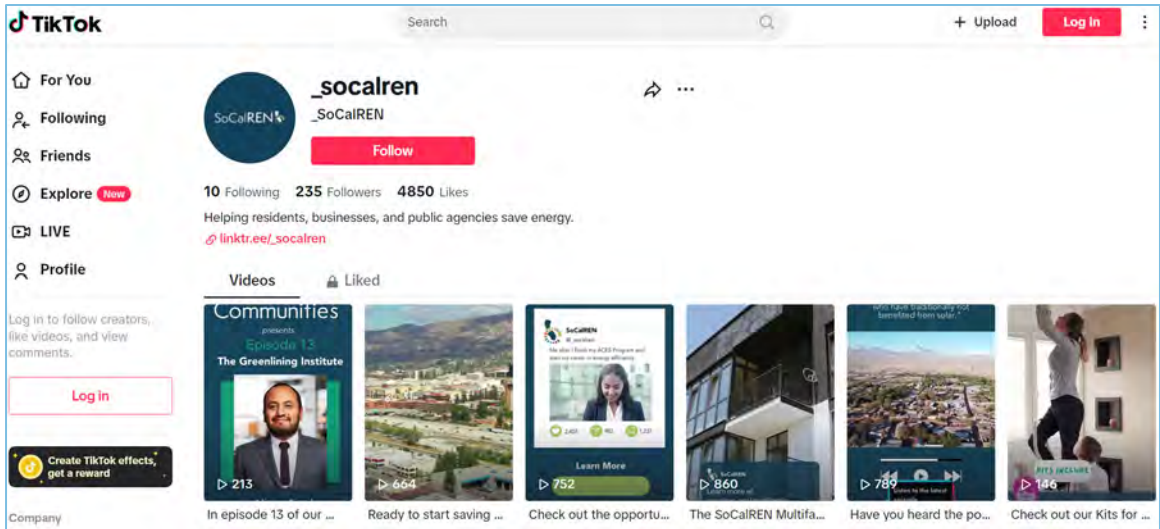
Portfolio Marketing and Outreach

SoCalREN complements marketing at the sector and program level with portfolio-wide efforts designed to increase awareness of SoCalREN programs, promote successful

projects in participating communities, and drive participation and engagement with SoCalREN. Activities conducted in 2023 included:

Digital marketing and outreach tactics including a website, email newsletters, and social media engagement through Facebook, Instagram, LinkedIn, and TikTok.

Figure 7. SoCalREN Social Media Sample



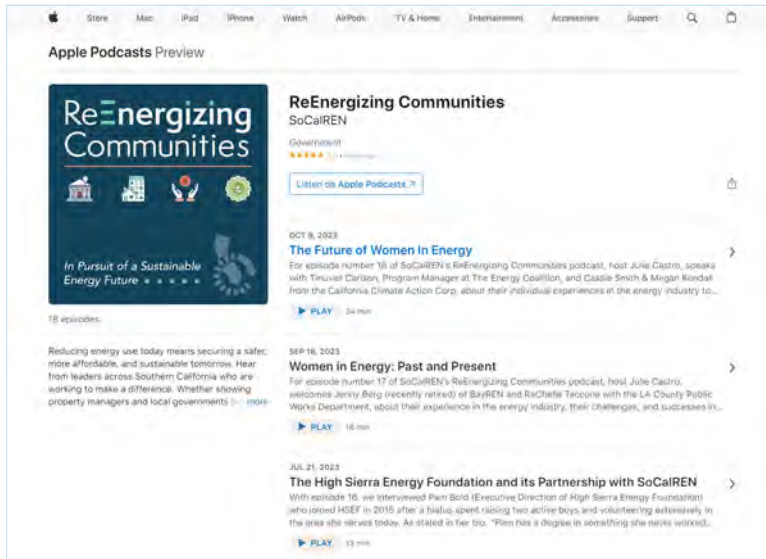
Events and community engagement including one-on-one discussions with consumers, contractors, industry allies, and other stakeholders at a variety of public events, conferences, and seminars. For example, SoCalREN was an active participant in and sponsor of events such as the Net Zero and U.S. Green Building Council LA (USGBC-LA) annual events during 2023.

Figure 8. SoCalREN Outreach at Net Zero 2023 in Los Angeles



SoCalREN’s **ReEnergizing Communities Podcast** completed its third season, with four quarterly episodes covering the Kits for Kids Program, participating Public Agency Las Virgenes Municipal Water District, Regional Partner the High Sierra Energy Foundation, and a two-part episode on the Past, Present, and Future of Women in Energy.

Figure 9. SoCalREN’s ReEnergizing Communities Podcast



CalREN Participation and Facilitation Support

Established during a July 2022 REN Planning Group meeting in San Diego, CalREN facilitates a structured, strategic collaboration and communication process with the goal of elevating the RENs to harness their collective voice as key administrators of energy programs in California. Membership includes the four authorized RENs (i.e., BayREN, 3C-REN, SoCalREN, and I-REN) as well as the proposed Rural REN. Seven CalREN Coordination Group meetings were held in 2023. SoCalREN’s Public Sector team provides facilitation support for CalREN Coordination Meetings.

“ I can’t express enough how helpful they are. We have implemented several successful projects with the help of SoCalREN and continued work with them is really important to us. ”

—SoCalREN Enrolled Agency

2024 Portfolio Outlook

In July 2023, the CPUC issued a Decision approving SoCalREN’s 2025–2031 Strategic Business Plan, with programs launching starting in Q2 2024. Program offerings will expand to new sectors including Agricultural and Commercial and will continue to focus on growth in underserved communities, job creation, and climate action through carbon

reduction. SoCalREN will also redouble its efforts to obtain external funding sources to expand the impact and reach of its programs.

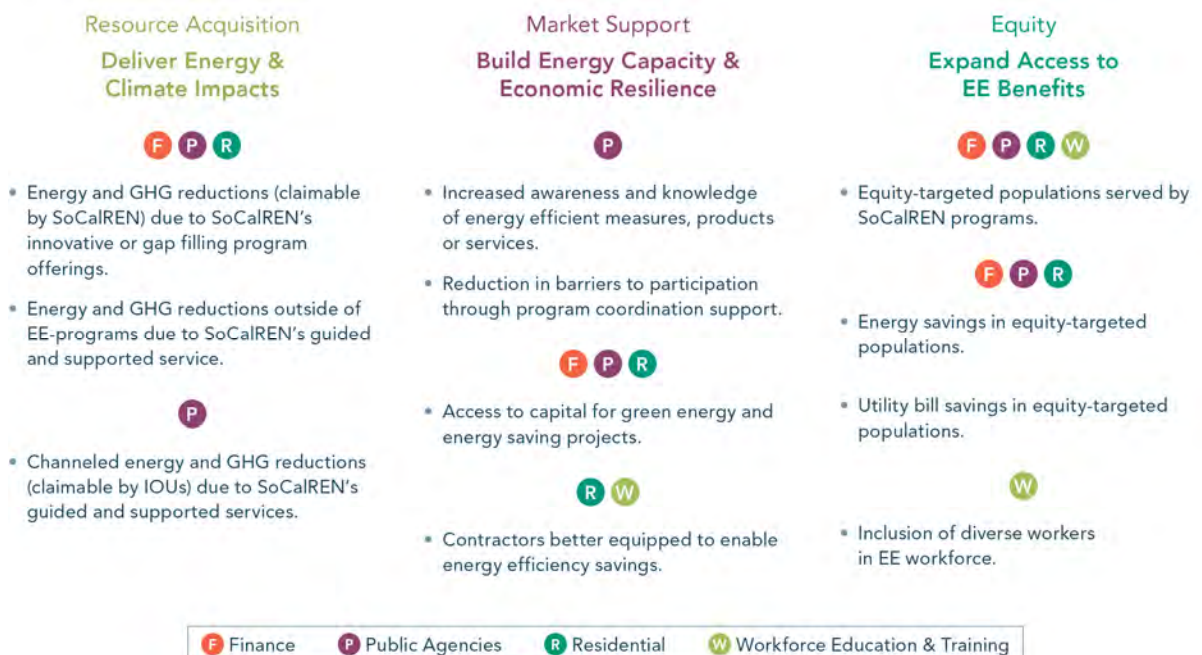


Temecula Riverside County

UNIQUE VALUE METRICS

In addition to common metrics, SoCalREN tracks unique value metrics (UVMs) that measure progress toward a set of stated goals that are all aligned to support its core values—Deliver Energy and Climate Impacts, Build Energy Capacity and Economic Resilience, and Expand Access to Energy Efficiency Benefits. UVMs are one important way SoCalREN demonstrates value to ratepayers, especially for those programs whose benefits may not be reflected through more traditional metrics such as Total System Benefit (TSB). Each metric is a measurement, intended to directly speak to the value that SoCalREN provides to the State and the communities it serves.

Figure 10. SoCalREN's Unique Value



SoCalREN continues to focus its efforts on supporting projects in underserved areas and reaching low-income and hard-to-reach communities. Its programs have delivered important and measurable benefits to these customers, which are reflected in energy saving and GHG metrics. Beyond these more traditional sets of metrics, SoCalREN's programs provide myriad additional benefits to customers and programs that are captured through other UVMs.

Many UVMs focus on driving environmental equity through DAC and HTR EE participation, which is a primary goal of SoCalREN. Others reflect how SoCalREN's programs are driving progress through workforce development. Achievements are summarized below and detailed in Appendix A.

Table 1. UVM Achievements in 2023

Sector	Metric	2023 Achievement
Portfolio-Wide	Final portfolio kWh	10,690,142
Portfolio-Wide	Final portfolio Therms	282,172
Portfolio-Wide	Final portfolio GHG from kWh	2,932
Portfolio-Wide	Final portfolio GHG from Therms	1,496
Public	Projects constructed and completed	150
Residential	Disadvantaged multifamily properties served	19
Residential	Tenant units served	4,491
Residential	Incentives paid in DAC (including Rural/HTR)	\$2,596,106
Residential	Total project costs in DAC	\$6,639,662
Residential	Total project costs in Rural/HTR	\$6,902,289
WE&T	Student internships	33
WE&T	Total participants	626
WE&T	Opportunity youth career plans	40
WE&T	Partners (e.g., educational institutions, employers)	32



Huntington Beach Orange County

FINANCE SECTOR

SoCalREN's Finance sector places an emphasis on increasing the number of impactful energy efficiency projects, focused on underserved areas. Lack of access to capital resources is a primary barrier that prevents energy efficiency projects throughout the region. SoCalREN offered one finance program in 2023, focused on public agencies and delivered in conjunction with Public sector offerings.

Figure 11. 2023 Finance Sector Impacts and Highlights



Sector Modifications

- The 1 percent administrative fee was removed for participating agencies.
- Introduced a new requirement that projects participating in the SoCalREN Cross-Cutting Finance Sector program must participate in at least one SoCalREN resource incentive program.

New Program Offerings

No new programs were offered within the Finance Sector in 2023.

Planned Optimizations and 2024 Outlook

In 2024, the Revolving Savings Fund will continue to focus on pipeline development to ensure replenished funds can be used for new projects, enabling the revolving cycle to continue.

Public Agency Revolving Loan Fund

SoCalREN's Revolving Loan Fund, publicly known as the Revolving Savings Fund (RSF), is a market support financing program that supports energy upgrades to public agency facilities in underserved communities. The RSF provides up-front construction financing for energy upgrades, increasing energy efficiency adoption in underserved communities and making it easier for public agencies to participate in energy efficiency programs. With RSF, public agencies can overcome budgetary barriers and complete projects that would otherwise be delayed. Program objectives are as follows:

- Stimulate SoCalREN energy projects in underserved communities,
- help SoCalREN program participants in underserved communities overcome funding and budget challenges,
- increase awareness of the low cost of capital and low risk financing for underserved SoCalREN participants' energy efficiency projects,
- build awareness of the financial benefits of financing energy efficiency projects and services through the Revolving Savings Fund, and,
- increase the number of financing resources for underserved communities.

Services

The program offers up-front construction financing for small to midsize projects at 0 percent interest. These loans provide financing for approved but not-yet-budgeted projects that would otherwise be delayed pending budget allocation. RSF can also be paired with other financing options such as on-bill financing (OBF), incentives, rebates, and other external financing such as California Energy Commission (CEC) loans.

Loans are financed with \$2.2 million in seed capital, provided through the County of Los Angeles using American Reinvestment and Recovery Act (ARRA) funds already granted by the CEC. RSF ensures agencies have the support they need to secure long-term financing and to pay back the loan. To help agencies build buy-in for RSF, the program provides a project proposal, a template board resolution, and other resources that make the program easy to understand and easy to use.

Figure 12. How SoCalREN's Revolving Savings Fund Works



Performance

SoCalREN’s engagement and outreach activities successfully built a pipeline of projects and allocated nearly all of the program’s seed funds. In 2023, three public agencies are using RSF funds, amounting to \$2,081,806 in total funds disbursed. Agencies participating in the program have begun to make repayments. So far, they have returned \$1,298,527 back into the pool of funds. SoCalREN also submitted RSF applications for two public agencies waiting for approval from the Department of Energy (DOE) on their Buy American Act waivers. Once approved, these applications will reserve about \$1.15 million in additional RSF funds. SoCalREN has a pipeline of three potential projects interested in program funding in the future. In total, these potential projects will result in commitments amounting to about \$800,000.

Figure 13. RSF Commitment Pipeline



The below savings were made possible through RSF. As a market support, non-resource program, these savings are channeled to other energy efficiency programs.

Table 2. RSF Program Energy Savings Installed

kWh	kW	Therms
398,954	-	-

Modifications

- The 1 percent administrative fee was removed for participating agencies.
- Introduced a new requirement that projects participating in the SoCalREN Cross-Cutting Finance Sector program must participate in at least one SoCalREN resource incentive program.

2023 Strategies

SoCalREN focused on promoting the RSF to public agencies using the following key strategies in 2023:

Supported participants with program application development and submission.

The Revolving Savings Fund submitted its first Buy American Act (BAA) waiver for the City of Ventura and Santa Barbara Unified School District lighting projects. Both

agencies made good faith efforts to utilize American-made products to ensure compliance with ARRA and BAA but based on non-availability and unreasonable costs, the agencies were unable to procure the materials domestically and requested the DOE to waive the Buy American requirement. The waiver will allow both agencies to receive the RSF funding needed to implement their projects and realize energy savings once approved.

Encouraged participants to repay their loans ahead of schedule.

The City of Pomona made an early payment towards its RSF loan in Q2 2023 as a result of additional funding received from a grant for its Library project. A total of \$1,029,831 was returned to the fund sooner than expected, allowing other agencies in the RSF pipeline to use those funds for their projects.

Facilitated the completion of a project utilizing RSF.

The City of Culver City's Veteran's Memorial project was the first completed project using the Revolving Savings Fund. The RSF loan provided the upfront capital needed to start its capital improvement project, rather than delay it to their next fiscal year.

Optimization/Outlook

In 2024, the Revolving Savings Fund will continue to focus on pipeline development to ensure replenished funds can be leveraged by new projects, enabling the revolving cycle to continue. The Revolving Savings Fund will also seek out additional funding opportunities to increase the "seed" funding.



Pomona Los Angeles County

PUBLIC SECTOR

SoCalREN uplifts public agencies so they can lead their communities toward a resilient energy future. SoCalREN's Public sector portfolio addresses barriers to energy efficiency in public agency facilities through tailored educational offerings, innovative incentive and financing pathways, and enhanced services for facilities in underserved communities. The SoCalREN team acts as an extension of public agency staff, guiding projects from energy analysis and project identification through procurement and installation.

SoCalREN serves a wide array of agency and facility types including schools, libraries, water and wastewater facilities, city halls, community centers, parks, data centers, and police departments. Close coordination with program and project stakeholders, including engineering firms, contractors, regional partners, third-party program implementers, and IOUs, maximize benefits for enrolled public agencies.

Figure 14. Public Sector Collaborators



• Sites

- Schools • Libraries • Streetlights • Data Centers
- Police Departments • City Halls • Community Centers
- Water and Wastewater Facilities

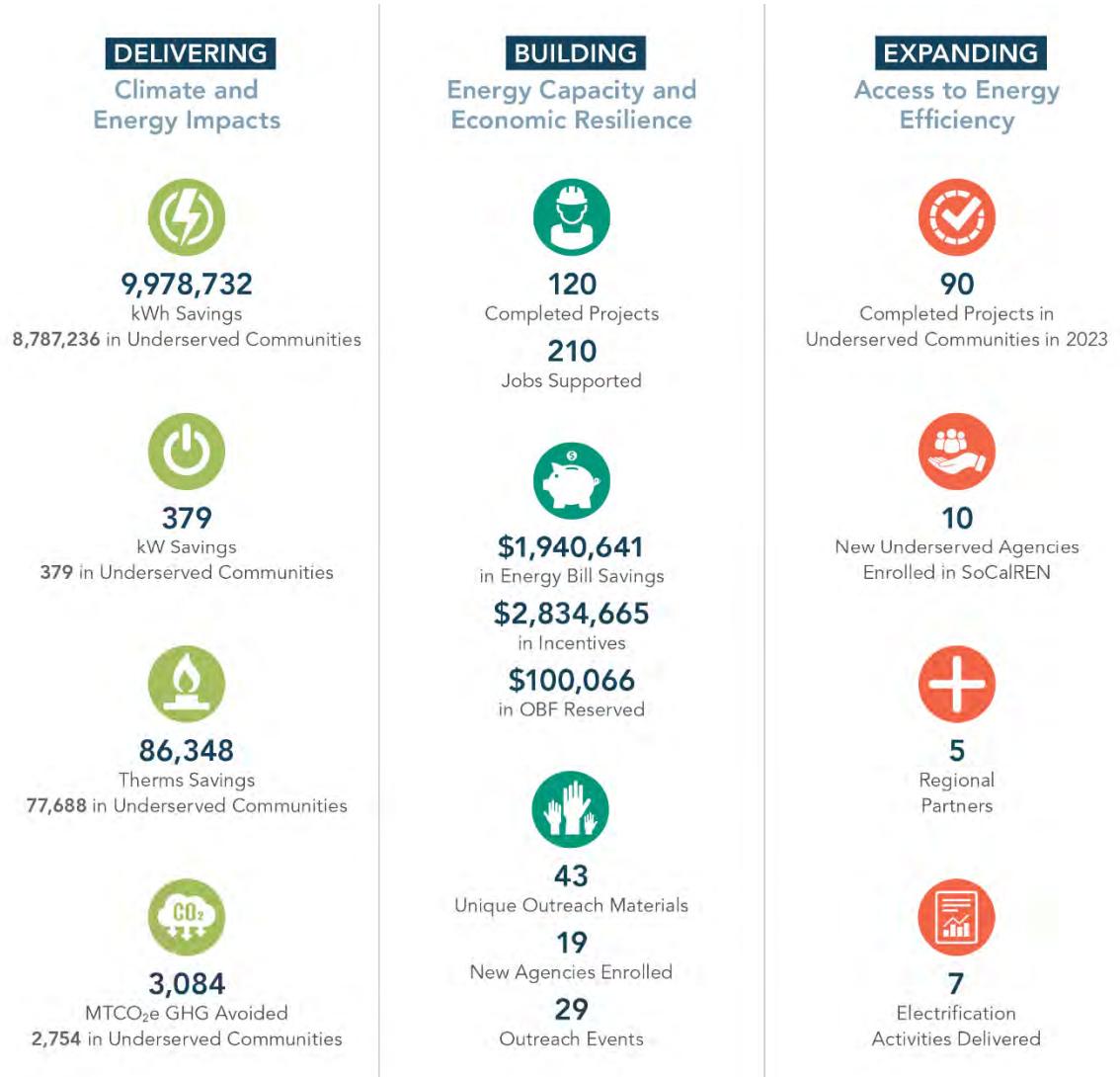
• Partners

- Engineering Firms • Contractors • Regional Partners
- SCE • SoCalGas • Implementers • Advisory Committee

• Eligible Agencies

- Cities and Towns • Counties • School Districts
- Community Colleges • Water Districts • Special Districts

SoCalREN’s success is measured by the significant energy and non-energy benefits delivered to communities across the territory. In 2023, SoCalREN built capacity among public agency staff, supported local investment in energy projects, and accelerated EE and decarbonization projects, particularly in underserved communities.

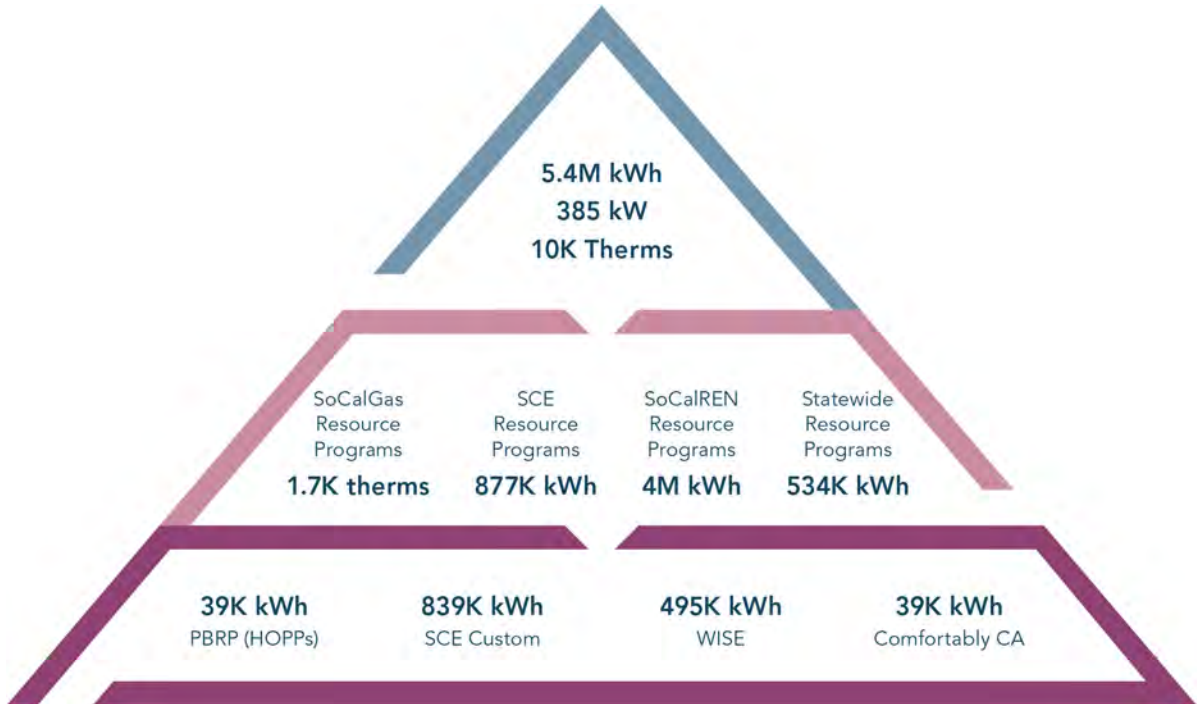


SoCalREN’s customizable suite of services helps public agencies complete holistic energy efficiency upgrades. SoCalREN builds the public sector’s capacity to lead communities toward resilient energy futures by driving public agency energy projects, offering peer-to-peer learning opportunities, and incentivizing holistic energy efficiency upgrades.

The four public sector programs offered by SoCalREN are supported by a cross-cutting financing program, the Revolving Savings Fund, which alleviates public agency capital constraints by providing bridge financing for energy efficiency projects located in

underserved communities. Together, SoCalREN’s network of participating agencies achieved 76,744,023 lifetime kWh, 3,397 kW, and 745,559 therm savings⁴ in 2023.

Figure 15. SoCalREN Public Sector Savings and GHG Reductions Contributions



The public sector programs prioritize equitable service delivery, aiming to maintain a minimum of 50 percent of installed projects in underserved communities. In 2023, 75 percent of completed projects (90) were located in underserved communities. In addition, 53 percent of enrolled agencies support underserved communities, and 70 percent of all agencies that received one or more SoCalREN service in 2023 support underserved communities⁵.

Marketing and Outreach Achievements

SoCalREN’s communications efforts in 2023 were focused on encouraging enrollment for eligible public agencies and increasing the engagement and capacity of agencies enrolled in the programs.

⁴ Savings include those channeled to SCE and SoCalGas incentive programs through Market Support activities, and direct savings captured through Resource Acquisition activities.

⁵ SoCalREN’s definition of underserved is defined as Communities in the 25th percentile of CalEnviroScreen 4.0, very low-income communities (as defined by California Department of Housing and Community Development), Title I schools, and rural communities (based on rural-urban commuting area). There is overlap with the CPUC’s definition of underserved and hard-to-reach definitions per D.23-06-055, though SoCalREN’s “underserved” definition includes additional census tracts beyond the CPUC definition.

Figure 16. Public Sector Marketing Highlights

SoCalREN shared educational resources and contributed to energy-related forums across our service territory, including via conferences, webinars, regional partner events, and virtual events such as Twitter chats. The program completed 30 outreach activities in 2023—a 30 percent increase from the previous year.

Figure 17. Public Sector Outreach Activity Highlights

In 2023, SoCalREN worked to build a library of communications resources and spread the word about SoCalREN's electrification-related services. SoCalREN conducted seven electrification-related outreach activities and developed nine unique outreach pieces.

Figure 18. Sample Electrification Materials



The Public sector program team developed a total of 43 educational outreach materials (including electrification and other topic areas) over the course of the year. SoCalREN public sector marketing efforts included a variety of formats and platforms.

Figure 19. Public Sector Educational Outreach Materials by Type

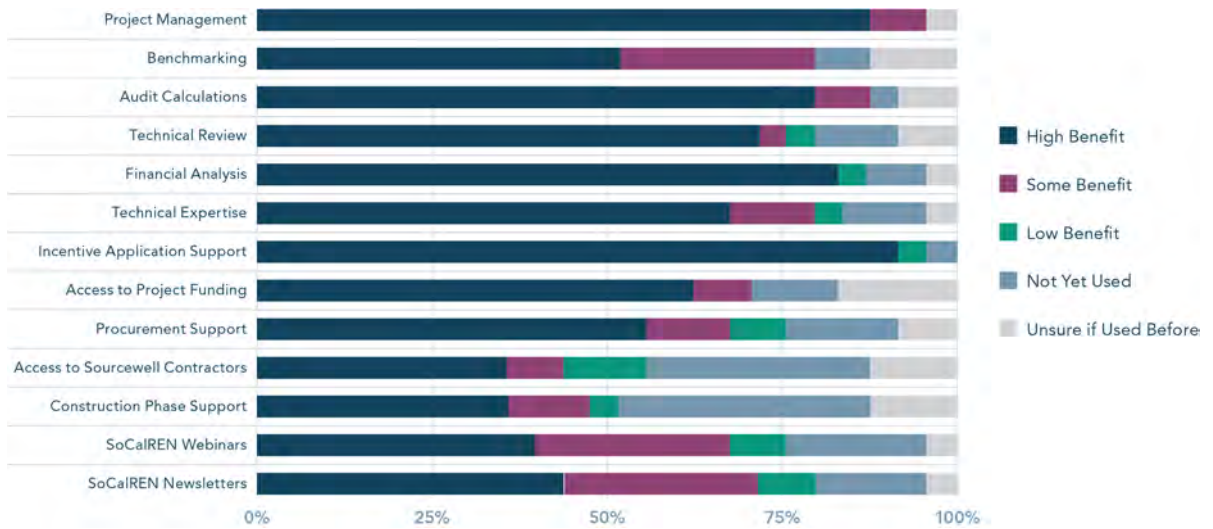


Notably, we updated the newsletter in 2023 to make public agency stories more accessible and shareable. Newsletter articles were shifted to blog post form and the “upcoming happenings” section was simplified, boosting the newsletter click rate to 2–4 percent, more than double the 1 percent click rate from previous years.

We achieved a 92 percent satisfaction rate based on annual survey responses, far exceeding our target of 80 percent and the American Customer Satisfaction Index (ACSI) benchmark of 77.8 out of 100⁶. Thanks to SoCalREN, 96 percent of participating public agencies indicated that they were able to complete energy efficiency projects that would not be possible otherwise (based on survey response data, n=25).

⁶ Source: <https://theacsi.org/the-acsi-difference/us-overall-customer-satisfaction/>

Figure 20. Satisfaction Survey Responses on Service Benefits



Celebrating a Decade of SoCalREN

On September 6, 2023, SoCalREN Public Sector Programs hosted a 10-Year Leadership Luncheon Awards at The California Endowment’s Center for Healthy Communities with Los Angeles County. At the event, energy industry leaders, SoCalREN regional partners, and public agency Energy Champions discussed innovative and community-based efforts to transform energy use in local communities.

Figure 21. Leadership Awards Luncheon Photos



Most importantly, SoCalREN celebrated the energy achievements of participating public agencies, with special acknowledgment for exceptional agencies' outstanding dedication to environmental activities and achievements with SoCalREN. The invite-only event was attended by 50+ SoCalREN agencies, partners, and stakeholders, including key local, state, and federal energy sector leadership.

The event included a keynote address, two speaker panels, and six award presentations for stand-out public agency accomplishments in SoCalREN's first ten years of operations. The artwork for the SoCalREN 10-year awards, displayed in Figure 22, was created by Los Angeles-based illustrator and designer Kelly Malka.

Figure 22. SoCalREN 10-Year Anniversary Awards



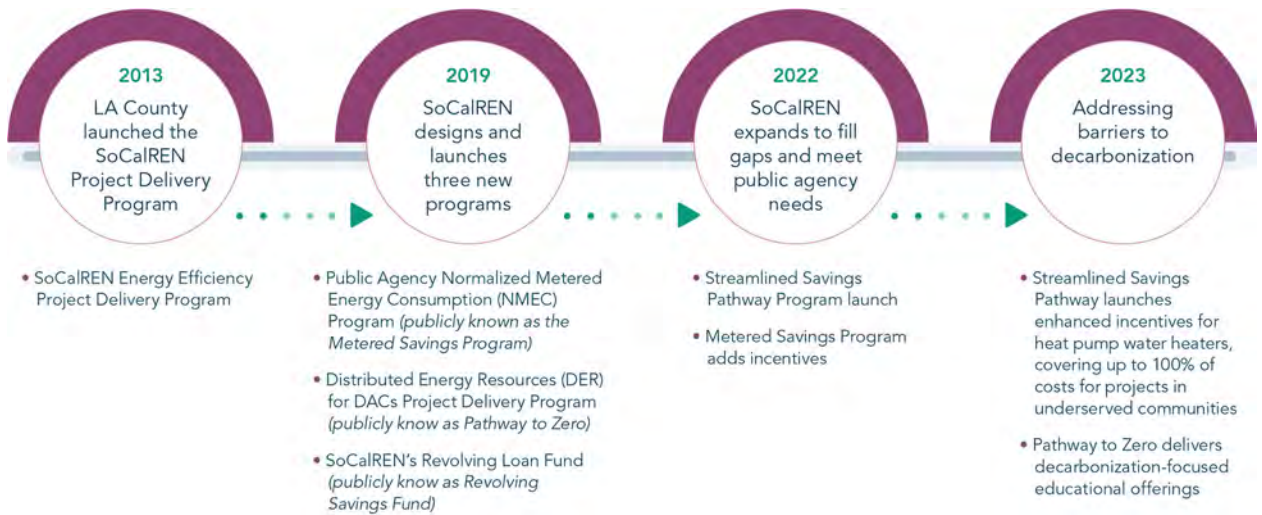
Sector Modifications and New Offerings

In 2023, new public sector offerings were launched to accelerate the electrification of public sector facilities, in alignment with state decarbonization goals. The Streamlined Savings Pathway offered enhanced incentives for replacing gas water heaters with heat

pump water heaters, covering up to 100% of measure costs for projects located in underserved communities.

Pathway to Zero complemented these enhanced incentives with a series of education and outreach activities focused on best practices for electrifying and decarbonizing public agency facilities. SoCalREN worked closely with regional partners to tailor decarbonization services and educational content to the unique needs of individual communities. Additionally, SoCalREN streamlined the agency enrollment process to get public agencies access to SoCalREN services and the benefits of energy efficiency and decarbonization more quickly and easily.

Figure 23. SoCalREN's Public Sector Evolution



Planned Optimizations and 2024 Outlook

In 2024, the SoCalREN Public Sector Programs are well-positioned to help public agencies tap into new clean energy funding and financing at the state and federal levels. SoCalREN will continue to assist public agencies with navigating tax credits funded through the Inflation Reduction Act (IRA) and applying for grant opportunities, including the Energy Efficiency Conservation Block Grant (EECBG) and the California Schools Healthy Air, Plumbing and Efficiency Program (CalSHAPE). SoCalREN will help public agencies combine these funding resources with energy efficiency incentives to alleviate project cost barriers and accelerate project implementation.

SoCalREN will coordinate closely with energy services companies (ESCOs) in 2024 to encourage holistic energy efficiency projects through energy savings performance contracting. SoCalREN will provide public agencies interested in performance contracting with on-call support from an owner's representative to orient them to the ESCO model and share key considerations for getting the most out of performance contracting. Further, SoCalREN will take lessons learned from the Streamlined Savings Pathway heat pump water heater enhanced incentive offering to build more tools and templates to help public agencies expedite energy efficiency project procurement.

California’s EE landscape continues to evolve as new IOU and REN programs launch. In 2024, SoCalREN will continue to collaborate with third-party program implementers to seamlessly coordinate service offerings and identify the best program pathway for each energy project. While new energy efficiency programs have been launched outside of the SoCalREN portfolio, public agencies continue to rely on SoCalREN for critical project delivery services and assistance navigating the myriad available programs. In 2024, SoCalREN will continue to support the 160+ energy efficiency and electrification projects in our pipeline and will help public agencies to develop new projects.

SoCalREN will launch five new public sector program offerings in 2024. The Regional Partner Initiatives Program will ensure SoCalREN services are customized to meet regional needs and will increase underserved communities’ program participation. Two additional programs bring a strategic energy management (SEM) approach to facilities with high savings potential: water/wastewater and underserved schools. Another new program, the Rural Hard-to-Reach (HTR) Public Agency Direct Install Program, will complete turnkey energy efficiency retrofits in rural and HTR public facilities. The final new public sector program, the Water Infrastructure Program, will incentivize high opportunity measures within water and wastewater treatment facilities. The growing SoCalREN public sector portfolio is poised to drive unprecedented energy action across the region.

“ Without SoCalREN’s services and expertise, our Agency would not have been able to receive all these energy efficiency savings and incentives. ”

–SoCalREN Enrolled Agency

Energy Efficiency Project Delivery Program

SoCalREN’s Energy Efficiency Project Delivery Program (PDP) is a market support program that provides public agencies with customized energy efficiency services so they can become proactive stewards and leaders in energy action. The program identifies energy saving measures and works side-by-side with public agency staff to overcome barriers throughout the energy efficiency project, from measure identification through construction completion.

SoCalREN-enrolled agencies can also access peer expertise, resources, shared procurement strategies, best practices, and lessons learned to leverage the collective knowledge and expertise of the SoCalREN network, reduce project costs, and address common barriers. The program provides access to project managers, technical advisors, engineering firms, contractors, financial advisory services, utility representatives, peer-to-peer learning (e.g. newsletters, workshops), and other industry stakeholders.

Services

SoCalREN offers comprehensive services to help public agencies implement energy efficiency projects, including:

- Project management support from project identification through construction completion,
- energy consumption benchmarking and comparative energy usage analyses,
- technical assistance, including identification of energy efficiency improvements, facility energy audits, and energy efficiency measure performance specifications,
- analysis of financing options, financial advisory services, financing and grant application support and assistance with rebate and incentive applications, and,
- proposal and construction support, including procurement guidance, staff approval support, construction management support, and third-party objective review.

Figure 24. Project Delivery Program’s Project Services and Delivery Approach



SoCalREN provides tools, resources, webinars, and more to help public agencies increase energy expertise, garner buy-in to implement energy projects, and demonstrate leadership to their communities, including:

- Peer-to-peer collaboration and learning opportunities through online and in person webinars and workshops,

- a network toolkit with energy efficiency guidebooks, case studies, communication materials, and webinar recordings, and,
- support with recognition of leadership in energy efficiency, such as incentive check presentations, case study development, trade group award nominations, awards, and social media content development.

Objectives

- **Fill market gaps** in the public sector and provide public agencies with comprehensive energy efficiency support for their facilities and infrastructure,
- **increase public agencies' ability to meet** local, regional, and state **energy targets**, climate targets, and policy goals,
- **increase the number of participating public agencies** in the SoCalREN network, with an emphasis on underserved communities,
- **position public agencies to lead** community awareness campaigns, engage stakeholders, build public awareness of local, regional, and state energy efficiency efforts, and drive participation in resource acquisition programs to reduce overall community energy consumption,
- deliver **persistent energy savings** through resource acquisition programs, and,
- **expand the implementation of cost-effective energy efficiency projects.**

Performance

SoCalREN added 19 new public agencies in 2023. Enrollments came from a variety of sources in 2023, bringing the total number of enrolled agencies to 236. Regional partners supported the enrollment of eight agencies, and seven enrollments were the result of referrals. These referrals from consultants, enrolled agencies, and Energy Champions confirm SoCalREN's trusted reputation and value to its network. Four additional enrollments were the result of outreach activities including webinar attendance, email campaigns, and tabling at events.

To accommodate the scheduling constraints public agencies often face at the end of the year, SoCalREN streamlined the enrollment process, which reduced the administrative burden on agencies. Further efforts to streamline enrollment will be continued in 2024.

Table 3. 2023 Agency Enrollment Data



13

Cities



2

Special Districts



4

School Districts

19

Total

Regional Reach Achievements

In 2023, SoCalREN demonstrated commitment to expanding its reach and maintaining diverse agency representation across the territory through continuing its Regional Reach strategy. The goals of the strategy are to: (1) deliver valuable services to the

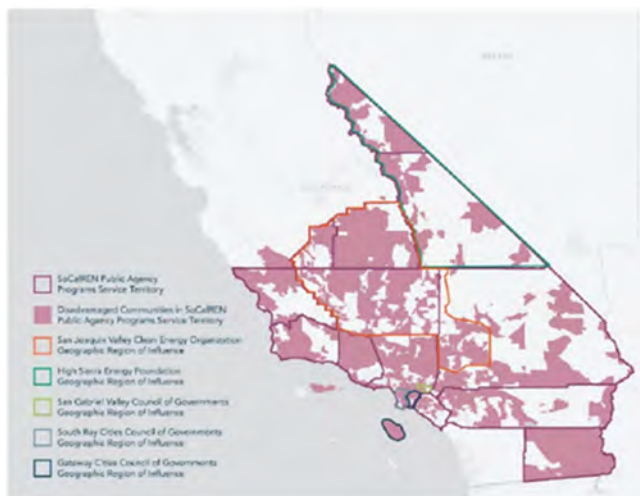
entire service territory, (2) strengthen communication among SoCalREN agencies and partners, (3) enhance services in sub-regions, and (4) identify opportunities and initiate efforts to meet specific sub-regional needs.

Figure 25. Hilton Creek Community Services Project



Coordination with five regional partners has enhanced engagement efforts and increased local energy action and projects across SoCalREN’s service territory. Regional partners serve as engagement liaisons to expand local agency enrollment, identify service gaps and training opportunities, and ensure agency participation in programs. Throughout 2023, the regional partners focused on new enrollments, marketing, energy analysis, and education and outreach efforts. They helped to enroll public agencies in SoCalREN, including their member agencies, special districts, and school districts. The regional partners supported the enrollment of seven new agencies in 2023.

Figure 26. Regional Partner Areas of Influence



The regional partners also provided energy education, motivation, and recognition for enrolled agencies. In 2023, they held 12 energy working groups, and four of the five partners managed competitive challenges to spur agency motivation and participation in SoCalREN. To share best practices and lessons learned, the regional partners presented their efforts through a poster presentation at the California Climate and Energy Collaborative Forum (CCEC) and served as panelists at the Behavior, Energy, and Climate Change (BECC) Conference.

Figure 27. Panel at the BECC Conference



One key success of the Regional Reach strategy is the continued coordination with five Regional Partners to enhance engagement efforts and increase local energy action and projects. Regional Partners serve as key engagement liaisons to expand local agency enrollment, identify service gaps and training opportunities, and ensure agency participation in programs.

In 2024, SoCalREN will further its regional reach, enrolling agencies across the territory. Strategic efforts will be made to engage special districts, school districts, and newly eligible agencies (community colleges, universities, and state and federal agencies). The launch of the Regional Partners Initiative Program will provide more opportunities to identify service gaps and fill them via innovative solutions.

Project Identification and Implementation Achievements

In 2023, the program supported the completion of 112 projects while simultaneously cultivating a pipeline of 128 future projects.

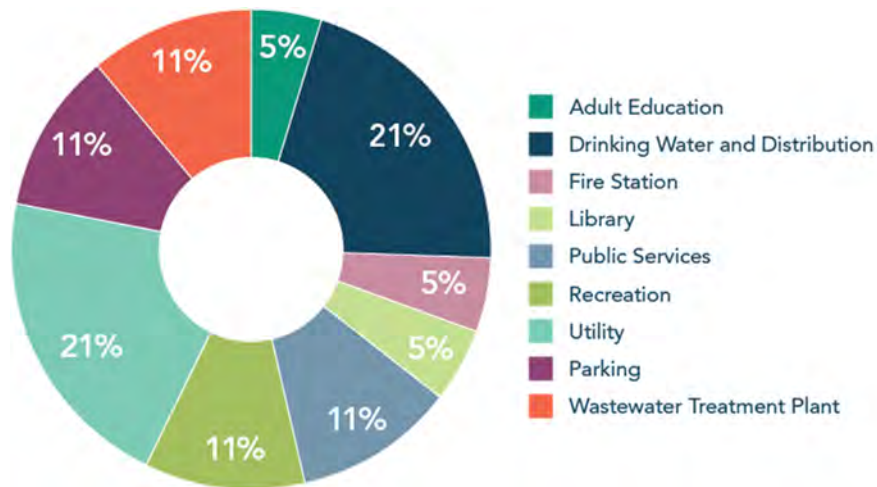
Participating agencies can use a variety of no-cost services to overcome barriers to implementing energy projects. The following table shows the percentage of 2023 projects that received specific services from SoCalREN.

Table 4. 2023 Installed Projects Leveraging Project Delivery Program Services

Program Service Type	Percent of Projects Using Service
Project management	100%
Incentive application support	79%
Objective technical review	78%
Procurement support	78%
Audit/engineering calculations	54%
Construction phase support	51%
Financial analysis	45%
Benchmarking	16%

The program performed audits and delivered initial measures lists for 27 sites in 2023. Some of these sites completed projects in 2023, though some are also anticipated to be completed in future years.

Figure 28. Breakdown of Facility Types Audited through the Project Delivery Program



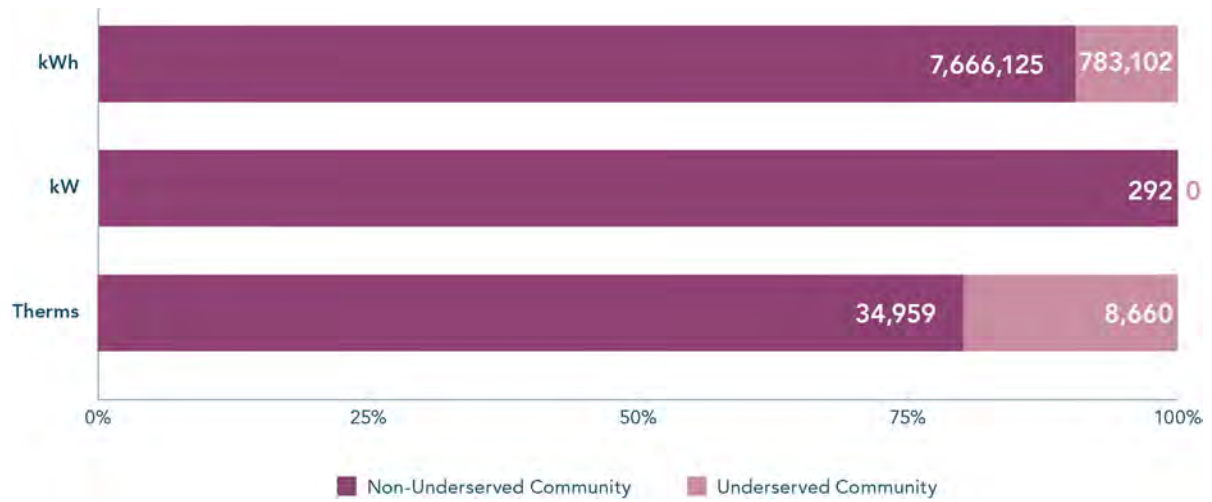
SoCalREN recognizes the importance of contributing persistent energy savings to help California meet its climate goals and energy resource capacity needs. While the Project Delivery Program is a market support program, it channels energy projects into resource acquisition programs.

The following figure reflects savings the SoCalREN Project Delivery Program has funneled through to IOU or SoCalREN resource programs⁷. These energy savings will result in a 5,903-ton greenhouse gas (GHG) emissions reduction, equivalent to taking 1,405 cars off the road for one year⁸

⁷ 3,988,344 kWh were channeled to resource programs. Metrics are inclusive of projects that did not claim savings.

⁸ Source <https://www.epa.gov/egrid/summary-data> and 4.20 metric tons CO2E/vehicle /year (EPA GHG calculator).

Figure 29. Project Delivery Program Savings Installed in 2023⁹



In addition to supporting projects that were installed in 2023, the Project Delivery Program developed new projects for 2024 and beyond. These pipeline projected savings are shown below.

Table 5. Project Pipeline Developed

Project Pipeline Developed		
16,956,265 kWh ¹⁰	1,736 kW	13,103 therms

The program supports economic development and construction jobs in the energy efficiency industry. SoCalREN agencies had gross construction costs of over \$17 million for their 2023 Project Delivery Program projects, supporting 186 jobs across California. In addition, by helping agencies reduce project costs and save on their utility bills, SoCalREN frees up scarce public resources for services like public safety, firefighting, and education¹¹.

Table 6. Program Achievements in Terms of Financial Support for Agencies

Number of rebate/incentive applications supported	49
Total rebate/incentives secured (\$)	\$2,736,225
Annual utility bill savings from resulting projects	\$1,593,840

⁹ Not all installation reports submitted in 2023 are claimed by resource programs in 2023. Metrics also include 2023 installed projects that are channeled through the Metered Savings Program, which does not require Installation Reports.

¹⁰ 3,616,405 kWh are channeled to Los Angeles Department of Water and Power through support from BMCTA funding.

¹¹ Construction conversion to jobs = gross project cost/\$92,000 per the American Recovery and Reinvestment Act of 2009 Guidance to Agencies on Estimating Job-Years from Government Spending. (<https://obamawhitehouse.archives.gov/administration/eop/cea/Estimate-of-Job-Creation/>).

The Project Delivery Program helped public agencies comply with the California Building Energy Benchmarking Program (AB 802), which requires owners of commercial and multifamily buildings over 50,000 square feet to benchmark and report data to the California Energy Commission annually. In 2023, PDP helped five agencies prepare and submit data for a total of 21 facilities to meet AB 802 compliance. This equates to over 2.5 million square feet of building gross floor area.

Modifications

In 2023, the program made minor adjustments to streamline processes, improve cost effectiveness, and respond to the evolving needs of the market.

2023 Strategies

The following are noteworthy 2023 strategies built on SoCalREN's record of successful program design.

Coordination with Third-Party Programs

SoCalREN's third-party program task force worked closely with statewide and local third-party energy efficiency program implementers to support public agencies to navigate all applicable programs. To provide reliable support and minimize customer confusion, SoCalREN developed coordination strategies with the Public Energy Performance (PEP) Program and SW WISE™ to identify the optimal program pathway when an agency is eligible for multiple incentive programs.

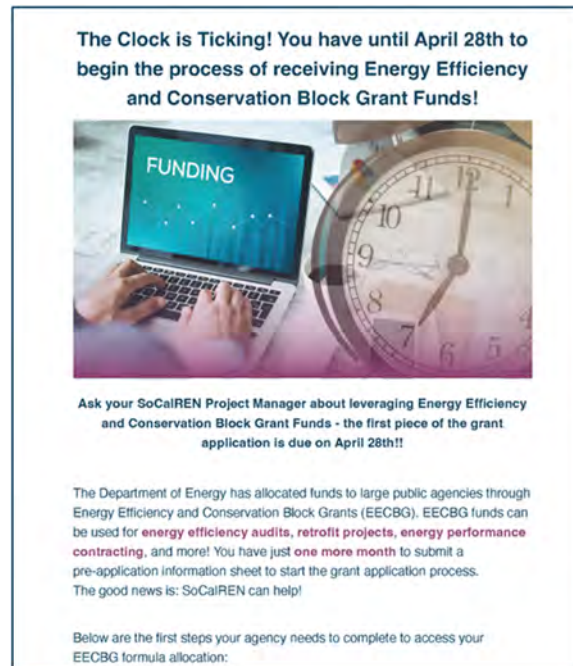
To facilitate collaboration, SoCalREN holds meetings with statewide third-party energy efficiency program implementers to discuss projects and program updates. SoCalREN and PEP hold monthly coordination meetings to discuss co-enrolled agencies, potential projects, and program updates. In 2023, these meetings successfully facilitated coordination for two public agencies with projects eligible for both SoCalREN and PEP and generated warm enrollment leads for both programs. Agency coordination calls are held as needed between SoCalREN and SW WISE™ when a project is eligible for both programs, and updates are shared between the two programs on an ongoing basis through open communication channels.

Connecting Public Agencies with Funding and Financing Resources

The DOE allocated funds for energy efficiency projects for public agencies through **Energy Efficiency Conservation Block Grants** (EECBG). SoCalREN helped public agencies navigate the new funding opportunity and understand how to best use their EECBG allocations.

SoCalREN distributed three email campaigns and personalized emails to public agencies to inform them of the opportunity and of SoCalREN's support. SoCalREN helped nine public agencies apply for and secure EECBG funding for their energy efficiency projects.

Figure 30. Energy Efficiency Block Grant (EECBG) E-Blast



The **Renew America’s Schools (RAS)** Program offers grants for clean energy improvements at K–12 public schools through a competitive award process. SoCalREN shared grant details and deadlines in an email campaign to 219 SoCalREN contacts. SoCalREN also identified 18 “high needs” school districts (per RAS criteria) to submit a concept paper as part of the application process. Several of the identified “high needs” school districts expressed limited staff capacity to develop the required concept paper. To overcome these capacity concerns, SoCalREN supported two school districts with their concept paper.

The **Inflation Reduction Act (IRA)** has brought a flood of funding for energy projects. SoCalREN hosted a webinar and developed a flyer to educate public agencies on how they can take advantage of the new opportunities including how public agencies can benefit from IRA’s enhancement of **Section 179D**, the energy efficient commercial building deduction, which allows building owners and designers to claim a tax deduction for installing qualifying energy efficiency systems.

Procurement Support

SoCalREN initiated multiple procurement related services in 2023 to help agencies expedite projects and achieve savings sooner including:

Owner’s Representative Onboarding: SoCalREN began working with “owner’s representatives” to support public agencies working with ESCOs. Owner’s representatives work with public agencies to represent their interests during the planning, execution, and completion of energy efficiency projects, particularly when engaging ESCOs.

Single source justification support: SoCalREN also supported agencies with single-source justification forms for heat pump water heater projects. As part of this process, SoCalREN provided single source justification forms detailing the scope of work and justification for utilizing one of SoCalREN’s preferred contractors.

Optimization/Outlook

The PDP continuously improves and integrates feedback to refine services. Program activities and optimization strategies for 2024 include:

- Continued discussions with third-party program implementers and other new energy programs as a result of the approved SoCalREN Business Plan to align services with new incentive programs,
- expand energy services company (ESCO) coordination strategies to help agencies implement large-scale, holistic projects,
- identify new state and federal funding and financing opportunities, educate agencies about them, and help agencies apply for and secure funds, and,
- develop tools and templates to help agencies overcome procurement barriers.

“ SoCalREN expertise is one of the best resources for local government staff. ”

–SoCalREN Enrolled Agency

Metered Savings Public Agency Program

SoCalREN’s Normalized Metered Energy Consumption (NMEC) Public Agency Program, known by the public facing name: Metered Savings Program, is a resource acquisition program that offers agencies with “stranded” savings access to SoCalREN’s support and cash incentives. The program uses a site-based NMEC approach to measure energy savings at the meter before and after project implementation, and then allocates incentives according to energy savings recorded at the meter.

The Metered Savings Program’s approach makes it simpler for public agencies to participate in energy programs by simplifying the review process for multi-measure projects. With the Metered Savings Program, agencies can complete more comprehensive energy projects that save more energy (and complete them faster).

Services

- Weather-normalized facility energy usage modeling,
- technical support for project application development,
- expedited third-party technical review of project applications,
- cash incentives for project energy savings realized at the meter, and,
- project energy savings reports and post-installation training for facility staff.

Objectives

- Reduce project complexity and improve project completion timelines,
- provide technical expertise and appropriate training to facility personnel to ensure the persistence of savings,
- deliver deep energy savings to public agencies, with a focus on underserved communities,
- contribute to climate goals by offering incentives based on GHG reductions, and,
- improve technical review and project completion timelines in the public sector.

Performance

The program focused on completing projects and also developing a strong pipeline for 2024 and beyond.

Metric	Savings Achieved*	Percent Underserved
First year net kWh	1,177,049	100%
First year net kW	114	100%
First year net Therms	46,361 (not claimed)	100%
Lifetime net kWh	9,290,670	100%
Lifetime net kW	1,329	100%
Lifetime net therms	303,869 (not claimed)	100%

*The NMEC true-up savings from previous years’ projects are included in the spreadsheet referenced in Appendix A and uploaded to CEDARS.

In 2023, the Metered Savings Program supported 46,361 therms savings. Difficulties surrounding predictive gas modeling prevented these therms from being claimable, but these therms remain important to report as they yield real bill savings benefits to the customers.

Table 7. Metered Savings Program Pipeline Developed for Future Years

Pipeline Developed*		
	Savings	Percent Underserved
First year net kWh	5,181,222	43% underserved
First year net kW	1,242	35% underserved
First year net therms	91,685	66% underserved

* Savings are based on forecasted construction completion timelines. Pipeline includes total savings projected for 2024 and beyond.

Table 8. Metered Savings Project Details

Metric	Number of Projects	% Underserved
Projects Installed	3	100%
Projects Approved	6	33%
Projects in Pipeline pre-Application Submittal	19	42%

Modifications

Introducing PRAXIS software for the Metered Savings Program’s energy modeling was a very beneficial modification made to the program in 2023. Utilizing CalTRACK with PRAXIS to establish a baseline, create counterfactuals, and measure projects’ savings has standardized this process and increased the accuracy of our models. More details regarding PRAXIS are shared below in the Strategies section.

2023 Strategies

- Integrating the PRAXIS software into the Metered Savings Program’s process has allowed SoCalREN to produce predictability analyses and measurement and verification plans more cost-effectively. PRAXIS has also reduced the processing time for these documents, getting our agencies to project implementation quicker than ever.
- The Metered Savings Program has improved the accuracy of its final savings measurement process by enhancing the verification methods for installed

equipment/programming and adding more agency touchpoints to ensure the performance of the facility remains on track with expectations. This allowed for more favorable true-up claims for 2023 projects.

Optimization/Outlook

In 2024, the Metered Savings Program will focus on completing planned projects, scaling up program participation for future years, and enhancing the participant experience. Metered Savings Program optimizations for 2024 include:

- Implementing a tiered incentive structure based on energy savings to promote holistic projects with more energy savings. This will alleviate the issue of agencies either splitting larger projects into phases or only pursuing the measures with the best payback period.
- Public agencies often contract with ESCOs to deliver large-scale energy efficiency projects. By furthering our coordination with ESCOs, the Metered Savings Program can help the bottom-line of our enrolled agencies.
- In 2024, SoCalREN will use the newly introduced PRAXIS software to provide a web version of the Quarterly Savings Report to our agencies. This web report will allow our agencies to better visualize their energy usage during the savings reporting period. The report automation efforts made in 2023 will also make it possible to supply savings reports to agencies more often throughout the reporting year.
- Adding an ENERGY STAR building certification option for qualifying facilities participating in the Metered Savings Program. SoCalREN will cover all certification fees and manage the certification process from start to finish to get these facilities the recognition they deserve.

Pathway to Zero Program

Disadvantaged Communities Project Delivery Program is an Equity program that maximizes energy efficiency opportunities while driving the integration of distributed energy resources (DERs) and decarbonization in the public sector. The program provides a comprehensive evaluation of energy opportunities for facilities in DACs,¹² very low-income,¹³ and rural communities¹⁴. In 2023, the program focused on educating public agencies about the benefits of decarbonization and empowering them to act.

Services

SoCalREN's Pathway to Zero Program offers the following services to underserved communities:

- Comprehensive energy efficiency project support service to take agencies from project identification through completion, and,
- training and workshops on best practices for building decarbonization.

Objectives

- Increase the percentage of underserved communities' public agencies engaging in decarbonization strategies, reducing community greenhouse gas emissions,
- increase the ability of public agencies to meet local, regional, and state climate and energy goals,
- increase the number of public agencies participating in SoCalREN's EE programs, with an emphasis on underserved communities, and,
- encourage agencies to lead their communities by example.

Performance

In 2023, Pathway to Zero continued to help underserved communities achieve their energy resilience goals. The program supported 49 EE projects in underserved communities, eight of which were completed in 2023. SoCalREN provided project support to six public agency buildings and two non-building facilities, such as parks or water treatment plants. Pathway to Zero provided underserved communities with the support services they needed to overcome barriers to address their climate and energy goals.

Table 9. 2023 Pathway to Zero Installed Savings

2023 Construction Complete Savings ¹⁵	
First-Year Annual On-bill Savings (kWh)	1,529,504
First-Year Annual On-bill Savings (kW)	87
First-Year Annual On-bill Savings (therms)	42,729

¹²As defined by [CalEnviroScreen 4.0](#).

¹³As defined by California Department of Housing and Community Development.

¹⁴As defined by Rural-Urban Commuting Area.

¹⁵Not all installation reports submitted in 2023 are claimed by resource programs in 2023. Metrics also include 2023 installed projects that are channeled through the Metered Savings Program, which does not require Installation Reports.

These energy savings will result in a 1,068-ton GHG emissions reduction, equivalent to taking 254 cars off the road for one year. Many Pathway to Zero projects' energy savings are attributed to and claimed by resource programs. Projects supported by the Pathway to Zero Program and completed in 2023 channeled 1,445,340 kWh into resource programs.

Table 10. Installed Projects Leveraging Pathway to Zero Services

Percent of Installed 2023 Projects (by Construction Completed)	
Pathway to Zero Service Type	Percent of Projects Utilizing Service
Project Management	100%
Audit	83%
Benchmarking	67%
Financial Analysis	67%
Technical Review	67%
Incentive Application	50%
Procurement Support	33%

Table 11. Financial Benefits to DAC Public Agencies

Annual Utility Bill Savings	\$346,801
Total Resource Program Incentives Captured	\$98,440

Pathway to Zero goes beyond energy efficiency to provide agencies with information and resources to support building electrification. In 2023, the Pathway to Zero Program conducted electrification outreach activities to help public agencies and their communities identify and fund projects to save energy and reduce carbon emissions.

SoCalREN's approach included organizing electrification webinars, tailoring presentations for regional partner territories, and promoting electrification resources across SoCalREN's service territory. An integral part of our outreach strategy involved conducting a series of webinars at network-wide and local levels. These webinars served as platforms to share valuable insights, including case studies and background information on electrification projects (i.e., heat pump water heaters).

One standout in our electrification outreach was the "Flip the Switch" webinar series. Each webinar attracted around 55 participant registrations, surpassing our usual registration rate by 10 percent. The response from public agencies was overwhelmingly positive, reflecting a keen interest in exploring the nuances of electrification. These sessions received an average rating of 4.9 out of 5 on the quality of the webinar, indicating high participant satisfaction.

Figure 31. Pathway to Zero Heat Pump Presentation



In addition, SoCalREN coordinated with each regional partner to create localized workshops that tackle decarbonization challenges unique to each subregion, with an emphasis on heat pump water heater incentives. SoCalREN worked with regional partners to develop and promote electrification-related email campaigns, talking points, FAQs, and promotional email signatures. The table below lists the various outreach activities achieved in 2023.

Table 12. Electrification Outreach Initiative

Electrification Outreach Targets	Goal	Completed	Percent of Goal
Electrification outreach materials developed	4	6	150%
Electrification activities delivered (e.g. workshops/webinars/presentations)	6	7	116%

In 2023, Pathway to Zero developed a significant pipeline¹⁶ of energy projects for 2024 and beyond. Pipeline development is essential to long-term program success since once identified, a project may take up to four years to complete.

Table 13. 2024 Pathway to Zero Project Pipeline

7,573,103 kWh	1,543 kW	98,967 therms
---------------	----------	---------------

¹⁶ Project pipeline values are reported with confidence factors applied depending on the status of the project to account for attrition of early projects and minimize over-reporting.

Modifications

Pathway to Zero continued to support energy projects already in development, but new projects were developed under the Project Deliver Program. Pathway to Zero primarily focused on project support services and electrification outreach initiatives in 2023.

2023 Strategies

All strategies outlined in the Project Delivery Program Strategies section were co-developed and implemented by the Pathway to Zero Program. Pathway to Zero also uniquely pursued a strategy of electrification education and outreach. As noted above in the Performance section, the Program developed a series of network-wide and local webinars to share case studies and background on building electrification projects. SoCalREN's regional partners supported community outreach and engagement on electrification topics.

Optimization/Outlook

In 2024, the Pathway to Zero Program will continue to support and close out energy retrofit projects that are currently in progress in addition to continuing to offer electrification education and outreach services. The program anticipates supporting 41 projects with a savings pipeline of 7,573,103 kWh and 98,967 therms.

As noted in its Integrated Demand Side Management (IDSM) Advice Letter 18-E/18-G, submitted on March 15, 2024, SoCalREN plans to support DER project development. Originally, Pathway to Zero was designed to be infused with California Energy Commission Benchmarking Call to Action funding to support the non-EE DER offerings, but in 2024 the CPUC IDSM funds will support these activities, if approved.

This change will expand Pathway to Zero, allowing the program to comprehensively support DER project development including audits, procurement assistance, financing support, and construction support. DER audits help agencies determine which DERs and energy interventions would benefit them most (including helping them achieve local and state energy, environment, and climate goals). In 2024, the Pathway to Zero Program will add DER measures into energy efficiency audits and project proposals. It will provide savings and cost estimates as well as financing solutions for the recommended DER strategies.

Streamlined Savings Pathway Program

The Streamlined Savings Pathway Program is a resource acquisition program that fills gaps and incentivizes long-lasting energy efficiency measures. The program design minimizes the cost of delay caused by lengthy application review timelines and provides funding for public sector energy efficiency projects, particularly in underserved communities.

Services

The Streamlined Savings Pathway offers the following services to public agencies to help them complete energy efficiency projects:

1. An expedited in-house SoCalREN project application review process in alignment with CPUC custom and deemed project technical review requirements. The program aims to provide initial application processing in approximately ten business days and completes project technical review in approximately 30 business days.
2. Monetary incentives based on lifecycle GHG emissions reductions, which are delivered once installation is verified.
3. Enhanced incentive rates for disadvantaged, low-income, Title I schools, and rural public agencies.

The Streamlined Savings Pathway integrates seamlessly with the SoCalREN's public sector Market Support program, the Project Delivery Program, to help public agencies save energy and money, as displayed below.

Figure 32. Streamlined Savings Pathway Project Delivery Process



Objectives

- Generate persistent and long-term electric savings (kWh and kW) and GHG emissions reductions to support SoCalREN program and state clean energy goals,
- assist public agencies in electrifying their facilities,
- increase energy efficiency program participation in underserved communities by offering enhanced monetary incentives to fund energy upgrades,
- mitigate the cost of project implementation delays for public agencies by quickly yet rigorously reviewing incentive applications, and,
- reduce project delays and complexities by leveraging in-house technical expertise.

Performance

In its second calendar year of implementation, the Streamlined Savings Pathway focused on installations of energy efficient measures, supporting public agencies' decarbonization goals, and developing a strong project pipeline.

Table 14. Streamlined Savings Pathway Program Performance

2023 Completed Projects		
	Savings Claimed	Percent Underserved
First year net kWh	2,566,269	70%
First year net kW	81	51%
First year net therms	-90	100%
Lifetime gross kWh	24,923,299	69%
Lifetime gross kW	591	36%
Lifetime gross therms	-1,004	100%

Table 15. Streamlined Savings Pathway Pipeline Developed for Future Years

Pipeline Developed*		
kWh	8,003,296	65% underserved
kW	500	75% underserved
Therms	10,065	86% underserved

*Savings are based on forecasted construction completion timelines. Includes total savings projected for 2024 and beyond.

Table 16. Streamlined Savings Pathway Project Details

Metric	#of Projects	% DAC
Projects Installed	86	71%
Projects Approved for Future Installation	18	78%
Projects in Pipeline Pre-Application Submittal/Approval	59	85%

In addition to building a robust project pipeline, the program prioritized quick application processing and review to help agencies complete projects. On average, the program completed project application technical reviews 47 percent faster than the program’s goal of 30 business days.

Table 17. Streamlined Savings Pathway Project Review Timelines

Review Period	Average Number of Business Days To Complete*
Technical Review	16
Application Approval	24

*Excluding CPUC review and response periods

Modifications

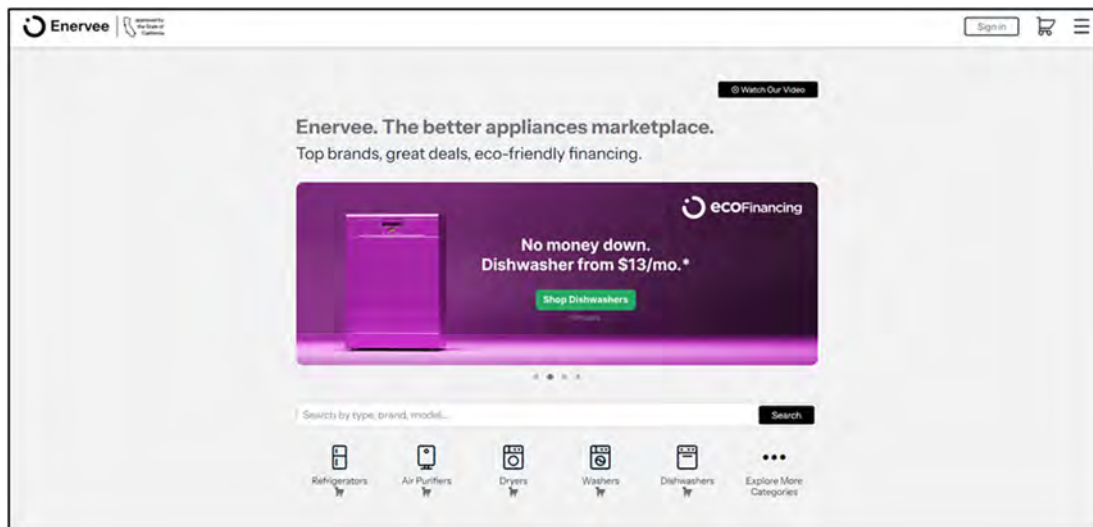
The most substantial modification applied to the Streamlined Savings Pathway in 2023 was its focus on driving heat pump water heater installations. Through this initiative, SoCalREN was able to electrify the water heating of 61 public agency facilities, build industry connections, and support local contractors.

2023 Strategies

- Streamlined Savings Pathway’s most impactful innovation in 2023 was the heat pump water heater (HPWH) initiative, which offered up to 100% cost coverage to agencies replacing a gas water heater with a HPWH. Through this initiative, SoCalREN agencies installed 87 HPWHs (70% in underserved facilities), which contributed 2,017,078 kWh to Streamlined Savings Pathway’s 2023 savings goals and reduced gas consumption of these facilities by 85,447 therms.
- The Streamlined Savings Pathway conducted outreach to over 200 local contractors, three Councils of Governments, and two Regional Partners to promote the HPWHs and educate public agencies about our offering. Through this coordination with local contractors, SoCalREN was also able to create a preferred contractors list of pre-vetted contractors for informal bidding and single source procurement opportunities.
- To effectively utilize SoCalREN’s incentive budget, SSP coordinated with the TECH Clean CA¹⁷ program to stack incentives where appropriate and contribute to both program’s goals. SoCalREN projects made use of \$108,500 in TECH incentives to push 35 HPWH installations to completion.
- Through a coordinated effort, SSP incentives were added to the Enervee website to promote the program to Enervee marketplace shoppers and drive projects into SSP’s pipeline.

¹⁷ “TECH Clean California is a statewide initiative to accelerate the adoption of clean space and water heating technology across California homes in order to help create an equitable pathway to carbon-free homes by 2045 and install six million heat pumps by 2030.” <https://techcleanca.com/>

Figure 33. Enervee Website



- Ensured strategic program coordination with third-party program implementers such as the statewide Water Infrastructure and SW WISE™ to ensure a united agency-facing approach and to limit duplication of program services.
- SoCalREN works with many different types of agency staff to get projects completed. To clearly communicate to staff in different roles and departments, SoCalREN created distinct one-pagers and other resources explaining Streamlined Savings Pathways incentives for public works/sustainability office staff, facility management staff, and even third-party contractors.
- Streamlined Savings Pathway aims to decrease the time from project identification to approval. In 2023, SSP saw a 24-business day submittal-to-approval average, two days faster than 2022 averages for SoCalREN and SCE. As a point of comparison, SCE's historical reference application approval timeline, based on SoCalREN's experience channeling over 400 projects through their pipeline from 2013–2021, is 163 days. SSP drastically cuts down on processing time to deliver savings to customers faster.

2024 Outlook

- A HPWH maintenance webinar will be held to train our agencies how to maintain these new HPWHs and get the highest efficiency and longest life from their new HPWH units.
- Streamlined Savings Pathway will continue to offer HPWH incentives in combination with TECH incentives.
- For agencies not ready to replace their gas/electric HVAC units, Streamlined Savings Pathway will analyze a software-controlled switch reluctance motor for their packaged system. This highly cost-effective measure will significantly decrease energy usage of running HVAC systems and possibly extend the life of the existing units.

- Focusing on driving costs down for our participating agencies, SoCalREN will be coordinating cooperative purchasing opportunities for stadium lighting and consider the same approach for HVAC, and lighting control systems.
- With the CPUC transition to goal setting based on TSB, it will be important to find creative ways to boost TSB. One such opportunity is to create an incentive measure for low global-warming potential (GWP) actions such as recharging an HVAC system with a low GWP refrigerant. In theory, this measure package could also be used with other measures such as HVAC replacements to a high-efficiency, low-GWP unit.

External Funding Leveraged by the Public Sector: BMCTA

In 2023, the Benchmarking Call to Action (BMCTA) Program continued to use non-ratepayer funding from the California Energy Commission (CEC) to: conclude DER-related services (which were offered in 2021), help Los Angeles County facilities comply with AB 802 (2015)¹⁸, and provide energy efficiency and DER services to facilities in Los Angeles County serviced by the Los Angeles Department of Water and Power (LADWP).

Thanks to additional funding from the CEC grant, SoCalREN was able to conduct comprehensive electrical audits for facilities served by LADWP and SoCalGas. In 2023, this sub-program delivered energy efficiency technical services to LADWP facilities owned by Los Angeles County¹⁹, contributing to the county's resilience objectives.

Services

Through BMCTA, SoCalREN offered the following services in 2023:

- **Expanded SoCalREN's services to LADWP facilities:** Delivered specialized technical support for six facilities, identifying eight energy efficiency projects. Successfully submitted five LADWP incentive applications, achieving an estimated annual electricity savings of 3,033,420 kWh, along with an estimated \$612,076 in incentive for the county. Furthermore, we conducted an additional energy efficiency audit, bringing the program's total to eight comprehensive audits from 2021–2023.
- **AB 802 benchmarking regulation fulfillment:** SoCalREN ensured Los Angeles County fulfilled AB 802 benchmarking regulations, a requirement for California facilities larger than 50,000 square feet.
- **Benchmarking data upload automation:** SoCalREN worked with utility energy providers to enable automated web services for 180 utility meters across Los Angeles County buildings. With automatic updates to energy consumption data, the county was able to comply with AB 802 benchmarking regulations for 113 buildings.

Objectives

The BMCTA sub-program complements and expands the reach of the SoCalREN's public sector programs to:

1. Enhance Los Angeles County's capability to achieve its sustainability objectives and the state's energy targets through energy benchmarking and support on compliance with the California Building Benchmarking Program,
2. develop the knowledge and skills of Los Angeles County staff regarding the California Building Benchmarking Program and the management of energy consumption across the county's portfolio of facilities,

¹⁸ AB 802 set a statewide program for benchmarking and disclosing building energy use for commercial, multifamily and mixed-use buildings 50,000 square feet or larger.

¹⁹ SoCalREN-funded natural gas related services.

3. help Los Angeles County make well-informed energy management decisions by utilizing benchmarking data that has been meticulously collected and analyzed through various program efforts,
4. broaden the scope of comprehensive energy efficiency audits and technical assistance to pinpoint and evaluate equipment that offers higher efficiency and to discover potential energy-saving opportunities in Los Angeles County facilities that receive service from LADWP, and,
5. discover and secure funding opportunities for Los Angeles County projects located within the LADWP service area.

Performance

Table 18. Program Performance Metrics

Benchmarking Call to Action Sub-Program Performance		
Metric	Goal	Completed
AB 802 Compliance for Buildings >50,000 sq. ft.	113	113
Number of EE Audits	0	1
Number of Additional EE Technical Services	0	8

Table 19. BMCTA Project Pipeline Developed

kWh	kW
3,616,405 kWh	510 kW

In 2023, BMCTA provided support to LA County by facilitating six additional rebate applications to LADWP, bringing the total to seven, for a collective estimated incentive of \$762,474.

Modifications

No modifications were made to the Benchmarking Call to Action (BMCTA) Program in 2023.

2023 Strategies

In 2023, the BMCTA program achieved a high level of proficiency in managing first-time Los Angeles Department of Water and Power (LADWP) incentive program projects, marking a significant milestone for SoCalREN. This accomplishment was the result of effective collaboration with LADWP staff and close coordination with construction project managers to ensure the successful implementation of energy efficiency projects.

SoCalREN continued supporting the county by completing Energy Star Portfolio Manager web services data connections for AB 802 eligible facilities. In 2023, SoCalREN

completed all coordination with LADWP, SCE, and SoCalGas to set up web services connections. Additionally, SoCalREN coordinated with LA County to manually upload necessary data for meters that were not eligible for web services.

In a coordinated effort, SoCalREN and LA County submitted all benchmarking records to the CEC for the 2023 AB 802 compliance year. Training courses were held with LA County and SoCalREN staff to provide necessary resources and instructions to support continued benchmarking record maintenance and AB 802 compliance into the future.

2024 Outlook

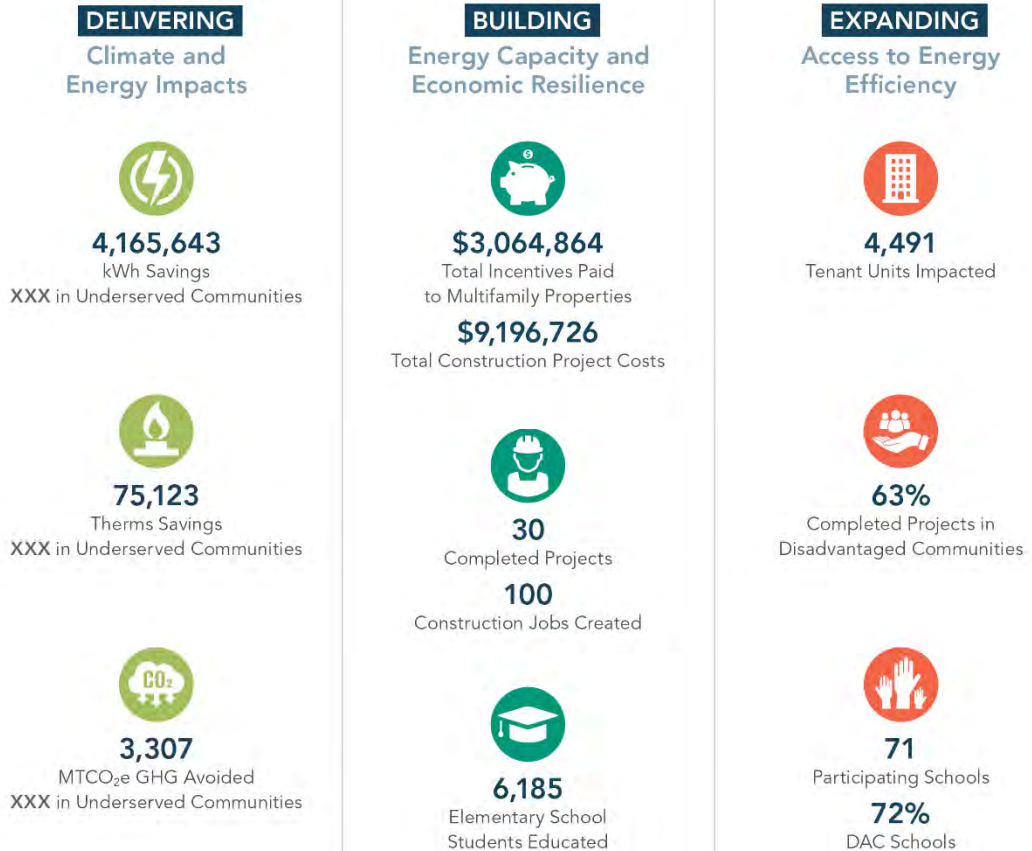
The 2023 BMCTA program budget has ended, marking a temporary pause in support for customers outside the territories of Southern California Edison and Southern California Gas Company in 2024. SoCalREN remains committed to exploring innovative avenues to continue supporting these customers in the upcoming year.



Tulare Tulare County

RESIDENTIAL SECTOR

SoCalREN offered two unique and successful Residential energy efficiency programs in 2023. Through the Multifamily and Kits for Kids Programs, SoCalREN impacted more than 10,000 households with energy efficiency benefits.



While these two unique programs employ different delivery models and tactics and serve different target audiences, their overall goals and objectives are aligned: bring energy efficiency to the maximum number of residences possible, with specific goals related to reaching Disadvantaged Communities (DACs) and Hard-to-Reach (HTR) customers. Both programs were successful in achieving these goals.

SoCalREN's Residential sector elevated contracting professionals who grew their businesses with Multifamily Program projects, and bolstered STEM efforts for the schools that received classroom participation grants when students successfully complete at-home Kits for Kids measure installations.

Results of 2023 efforts and a description of the unique value that SoCalREN's Residential Sector programs provide to the communities it serves are highlighted in the section below, followed by sections detailing each program's activities and impacts, and a brief description of planned 2024 program enhancements and activities.

- The SoCalREN **Multifamily Program** experienced dramatic market-driven changes in 2023. A focus on fuel substitution projects led to fewer total projects, but far higher savings and GHG impacts per project than in previous years. In 2023, energy efficiency retrofits were completed at 30 properties in the territory, impacting nearly 4,500 renter households.

More than 60 percent of the projects were completed at properties located in DAC ZIP codes; many of these projects also impacted traditionally hard-to-reach customers, including homes where English is not the primary language spoken. The program's Whole Building and Comprehensive Common Area paths achieved combined net energy savings of more than 4 GWh and nearly 85,000 therms with 63 percent of the savings delivered in DACs. The savings achieved equates to greenhouse gas (GHG) emissions savings of nearly 9 million miles driven by an average passenger vehicle.

- The **Kits for Kids** team shifted its focus to building relationships at the district level in 2023, resulting in achieving not only 100 percent of program enrollment goals, but building a project pipeline—with a waitlist—for 2024. Kits for Kids engaged with 250 classrooms in eight counties and delivered energy savings kits to more than 6,000 school children.

Students were supported with interactive educational materials that guided them through in-home energy efficiency activities including installing simple, self-install efficiency measures that were provided in the kits. The team also supported participating schools in developing and facilitating STEM-focused field trips and events with districts throughout the region.

Sector Modifications

While adjustments were made to outreach strategies on an ongoing basis to ensure program subscription and drive scalability, no formal changes were made to either Residential program during 2023.

New Program Offerings

There were no new program offerings in 2023.

Planned Optimizations and 2024 Outlook

As SoCalREN prepares to launch its 2024 Residential Sector programs, reaching underserved customers is top-of-mind. The sector will expand to include a new HTR Direct Install program for Multifamily properties in addition to the current comprehensive Multifamily Program. Upfront capital costs and staffing constraints make a traditional retrofit project difficult or impossible for many small property owners across the territory. Providing a direct install option will remove these barriers and will allow SoCalREN to deliver services to additional HTR households. The Kits for Kids program will build upon the scalability strategies launched in 2023 to grow the program. Both programs entered 2024 with strong participation pipelines and an enthusiastic market ready for expanded SoCalREN services due to successful 2023 activities.

Multifamily Program

The SoCalREN Multifamily Program helps property owners upgrade facilities through retrofit projects that improve living conditions and reduce energy costs for residents and property owners. The Program provides business opportunities for contractors who complete upgrades at participating properties. In addition to the cost-saving benefits of energy efficiency (for both owners and tenants), residents benefit from a safer, healthier, and cleaner living environment while building owners enjoy increased property values. The successful completion of a Multifamily project that addresses the needs of stakeholders at all levels is an effort that is both meaningful financially and helps California meet long-term GHG reduction goals.

The target audiences for the Multifamily Program are owners and managers of eligible multifamily properties located within the SoCalREN territory. This includes a wide range of property types; however, in 2023, the program focused heavily on recruiting smaller properties for participation. Secondary audiences include contractors who serve multifamily properties in SoCalREN territory. In addition, the Program provides messaging and tools to help educate tenants in participating properties about the Program, as well as general information about incorporating energy-saving behavior and habits in their homes.

Incentives are based on the percent energy savings achieved over baseline conditions and the number of units at the property. As-built conditions are captured during the initial assessment, and recommendations are made based on the observations made during the assessment. Incentives for the Whole Building Path are capped at 60 percent of the total project cost unless the project is in a DAC (determined by ZIP code). Projects located in DACs are capped at 75 percent of the total project cost.

Services

For Customers

- Technical support, including energy assessments, identifying energy efficiency improvement measures.
- Project management and other staff support throughout EE projects.
- Individualized contractor training with the Program's engineering team to ensure contractors understand the intake form and how to accurately collect necessary data and information.
- Project inspection to validate all equipment is installed and operational.
- Tenant educational materials in a variety of languages.

For Participating Contractors

- Training and education on EE measures.
- Marketing materials for customer sales meetings.
- Lead generation for multifamily projects through targeted digital, print, and direct mail advertising efforts.
- Technical support on project scope and installation.

Objectives

- **Deliver comprehensive energy saving projects:** To best serve the mission of SoCalREN, the Multifamily Program engages contractors, building owners, and residents to identify and implement energy savings opportunities through comprehensive retrofit projects that include electric, gas and water efficiency measures.
- **Achieve high participation in HTR and DAC customer groups:** The Program goal is to achieve at least 50 percent participation by HTR customers or properties located in DAC ZIP codes.
- **Drive SoCalREN portfolio cost effectiveness:** The Multifamily Program offers a streamlined approach to achieving energy savings to ensure the overall SoCalREN portfolio maximizes cost effectiveness.
- **Drive energy efficiency upgrades in all building types/sizes:** The Program serves the entire SoCalREN Multifamily market, as long as the property has at least five units and meets other program eligibility requirements.
- **Develop, Enhance, and Expand the Energy Efficiency Service Provider Market Serving SoCalREN Multifamily Properties:** The Program fosters the growth of service providers (i.e., contractors) supporting the Multifamily market at every level of building, project size, and complexity to facilitate the installation of comprehensive projects.

Performance

With the requirement to submit lighting projects to the custom review process, the program was at risk of losing contractor and customer participation. The team was able to leverage contractor relationships and completely change the focus of program projects—which to date had traditionally focused on lighting measures modeled with a software tool—to fuel substitution measures such as heat pumps.

Table 20. Multifamily Program 2023 Performance

Metric	Goal	Achieved	Goal %
Number of Installed Projects	60	30	50%
Percent of Projects in DACs	50%	63%	126%
Residential Dwelling Units Impacted	12,000	4,491	37%
Energy Savings (gross kWh)	8,034,292	4,452,093	80%
Demand Savings (gross kW)	375	409	109%
Energy Savings (gross therms)	466,598	100,164	21%
Energy Savings (net kWh)	5,061,529	4,165,643	95%
Demand Savings (net kW)	236	311	132%
Energy Savings (net therms)	293,957	84,521	26%
Enrolled Contractors	–	25	–

The outreach team worked closely with contractors to drive completed projects through a new approach focused on deemed measures. In 2023, 100 percent of contractors installed deemed measures only, a trend the program expects to continue in 2024. This strategy impacted the total number of projects completed in 2023, since each project delivered significantly higher savings than traditional lighting-focused projects, and therefore received higher incentive amounts. This meant that each project provided communities with greater GHG and cost reduction benefits; however, with incentive budgets remaining largely unchanged, the higher per project incentive amount resulted in a lower number of projects compared to previous years.

In addition, fuel substitution projects often led to negative therm savings, resulting in reduced progress toward therms savings goals in 2023. The program also expects this trend to continue in 2024 as state and federal planning efforts prioritize decarbonization measures such as heat pumps.

In 2023, the SoCalREN Multifamily Program claimed over 4 net GWh and more than 84,000 net therms. The regional results by county are displayed below.

Table 21. Multifamily Program Regional Energy Savings Results

County	Projects	Net kWh	Net Therms
Los Angeles	12	1,840,983	49,676
Orange	7	538,463	13,370
Riverside	2	692,400	3,868
San Bernardino	9	1,097,166	17,607
Total	30	4,169,012	84,521

By replacing older and inefficient equipment, property owners can reduce their ongoing energy and water costs and respond to fewer tenant maintenance calls. Projects completed in 2023 provided significant financial benefits.

Table 22. Financial Benefits to Multifamily Properties

Category	Amount
Annual utility bill savings for all properties (and DACs)	\$750,422 (\$472,765 in DACs)²⁰
Total value of projects completed	\$9,196,726
Total incentives paid	\$3,064,864

The Program strives to support construction jobs. This Program goal is measured by completed projects' gross construction costs. The 2023 gross construction costs of over \$9 million translate to 100 construction jobs supported.

²⁰ Based on U.S. Energy Information Administration average California utility costs of \$0.1800 per kWh.

Modifications

As described above, a major focus of the Multifamily program in 2023 was helping shift the program’s focus from lighting upgrades to electrification measure installations, increasing average energy savings and GHG impacts per project.

2023 Strategies

The Program deployed several strategies to support achievement of the program goals.

Recruitment of Additional Contractors

Dedicated, consistent recruitment of contractors has led growth over the past five years, culminating in a program high of 25 participating contractors in 2023. Project leads often come to the program via participating contractors, so developing an increased pool helps ensure a steady pipeline of multifamily projects and the achievement of energy savings goals.

Table 23. Five-Year Contractor Participation Growth

	2019	2020	2021	2022	2023
Participating Contractors	5	17	15	18	25

Multifamily Program AMP Visits

To build stronger connections directly with property owners and to foster pride in completing a SoCalREN project, properties received an Account Management Post-Construction (AMP) visit from a member of the program team. Properties were presented with an award and provided with support and guidance about how to showcase their energy efficiency upgrade and associated benefits. These efforts supported increased word-of-mouth marketing of the program directly between property owners and managers.

Figure 34. SoCalREN Multifamily Program AMP Visit



Multifamily Program Marketing

Direct email marketing through Contractor Newsletters, are disseminated monthly to participating contractors. These newsletters inform contractors of Program changes, requirements, updates, and various ways to be successful in the Program.

Figure 35. SoCalREN Multifamily Newsletter



Throughout the year, the contractor newsletters consistently held an open rate above 50 percent and a click rate at or higher than 2 percent. According to Constant Contact, the Multifamily Program team's preferred email management platform, these metrics align with and perform above industry standards for email click rates and open rates. In addition, the Multifamily Program team disseminated webinar eBlasts throughout the year promoting new contractor participation within the Multifamily Program and virtual event opportunities for participating contractors to provide feedback on the Program.

Multifamily Program Marketing Collateral

The Multifamily Program performed ongoing updates to the following key collateral pieces as needed to align with program objectives during 2023.

- Property Owner Agreement (POA)
- Multifamily Whole Building flyer (available in English, Spanish, Simplified Chinese)
- Multifamily Cobranded Whole Building flyer

- Comprehensive Common Area flyer (available in English, Spanish, Simplified Chinese)
- Multifamily Cobranded Comprehensive Common Area flyer
- Multifamily Contractor Manual
- Project Incentive Estimation Sales Tool

On the “Request Marketing Materials” section of Multifamily subsite, contractors were able to request customized marketing materials that are delivered to their business after their order is placed. All Program materials were available for contractors to download directly from the website to ensure easy access when needed.

Regional Partners

To create more Program awareness, the Program continued to work with four regional partners, High Sierra Energy Foundation, South Bay Cities Council of Government, San Gabriel Valley Council of Government, and San Joaquin Valley Clean Energy Organization. The Program meets with each regional partner separately to review new outreach plans, discuss upcoming events, and marketing tactics.

Optimization/2024 Outlook

The Multifamily Program has noted a marked increase in fuel substitution (i.e., electrification) projects over the past three years. The program expects this trend to increase in 2024 with additional funding for electrification measures coming at the state and federal level.

Kits for Kids Program

With increased public awareness of climate change and high-profile initiatives within schools to promote environmentally conscious activities, many school-aged children have increasing curiosity around how they can contribute to climate action. Developed originally as an effort directly responsive to the barriers presented by the COVID-19 pandemic, SoCalREN's Kits for Kids has grown into a flagship effort driving district-level planning action while still providing the individual learning experience and in-home measures popular with students and parents.

The heart of the program remains engagement with students and teachers, which was expanded in 2023 to include increased delivery of flexible lesson plans and experiential field trips to reinforce concepts presented in the classroom. Consistent with 2021 and 2022 performance, the 2023 Kits for Kids program achieved 100 percent of program goals, serving 250 classrooms—and establishing a full pipeline for 2024.

Figure 36. Students Receiving Kits



Each participating student received a Kit from the program, at no cost, filled with a set of measures to help provide energy savings for each household. Participating students receive energy-efficient items at no cost that can help their families save energy and

money. In addition to the energy and cost savings achieved by the student, Kits for Kids provided incentive grants to classrooms. These funds are used to directly support educational efforts in schools through equipment purchases, field trips, and learning experiences.

The free measures are designed to help households save energy and money. The at-home activity is intended to build on what has already been taught in the classroom. The activity is designed to help the student make connections between concepts learned through third and fourth grade science class and how the members of their household use energy at home, in a fun, hands-on fashion. Students have access to a free, online home-based educational activity with games, puzzles, and a tip sheet. These are designed to educate the participating student and other household members about energy efficiency and the positive financial and environmental impacts associated with participating and committing to EE behaviors.

Figure 37. Kits for Kids Box



Students return the enclosed postcards to the teachers who aggregate the information in an online information form. This includes information on the type of home (i.e., single-family or multifamily), the existing light bulbs they are replacing, as well as what measures from the kit they installed.

Services

Once classrooms are enrolled, the Kits for Kids Program mails the kits to each school so that the teachers can distribute the kits to the students to take home. Each kit is filled with two LED bulbs, one efficient showerhead, and two faucet aerators for families to install. The Program also offers electric-only kits that contain two LED lightbulbs and a Wi-Fi enabled smart plug. In addition, the kits include a sticker, magnet, pencil, shower timer, detailed directions on how to install each item, and a verification postcard that teachers will use to track the percentage of completed kits. The kits also include an insert for parents with more information and one for students.

The insert for students encourages them to go on an energy-saving adventure online to learn more about energy, how their family uses it, and more ways to save. If 65 percent of the students within a given participating classroom returned the completed postcard to their teachers, their classroom received a \$1,000 incentive grant. SoCalREN attended several area school board meetings to present ceremonial checks representing the value the Kits for Kids program delivered to classrooms within the district.

Figure 38. Riverside Unified School District Check Presentation Ceremony



Objectives

The program objectives of Kits for Kids are as follows:

- Educate students, parents, and guardians about energy efficiency to help household members make informed decisions now, and to encourage the continuation of EE behaviors by the students in the future.
- Provide financial relief to families/households through both energy cost savings and the no-cost measures provided to households.
- Drive climate action within residential communities.
- Reward students for participating by giving a classroom grant. This \$1,000 grant can be used by each participating teacher to help fund educational materials, supplies, field trips, and other experiences that help students learn and engage.

Performance

SoCalREN met the 2023 goal of enrolling 250 classrooms to participate in the Kits for Kids Program and surpassed the 50 percent DAC participation goal with more than 70 percent of enrolled classrooms located in DACs. The 250 total participating classrooms

are in 16 school districts and 71 schools in six counties throughout the SoCalREN territory. The Program distributed kits to 6,185 participating students.

Table 24. Kits for Kids Program Performance

	Performance	Percent of Goal
Participating Counties	6	N/A
Participating School Districts	16	N/A
Participating Schools	71	N/A
Percent Participation in DAC	72%	140%
Classroom Enrollments	250	100%
Participating Students	6,185	N/A

Modifications

During 2023, the Kits for Kids program focused on moving beyond individual teachers and online interest forms to generate enrollments. Applying lessons learned during the 2023 program year, the Kits for Kids team shifted outreach efforts to focus on building relationships at the district level. This approach created a secure pipeline of classrooms for 2024 participation and positioned the program for seamless scalability in years to come. The program also worked with its fulfillment vendor to update kits with enhanced Smart Technology and an additional language option (Mandarin Chinese). Online tools were updated to include a Family Portal for further engagement and education at home.

2023 Strategies

District-Level Partnerships

As noted above, during 2023, the Kits for Kids team concentrated efforts on building relationships at the school district level, with initial 2023 efforts focused on underserved districts in the Inland Empire. In addition to ongoing direct outreach activities (i.e., email, phone, and in-person visits) the program team participated in the District 10 Science Leaders Conference in Riverside in May 2023.

- **Rialto Unified School District** (San Bernardino County) partnership established in February 2023; 66 classrooms, 100 percent DAC.
- **Riverside Unified School District** (Riverside County) partnership established in June 2023; 107 classrooms, 70 percent DAC.
- **Fontana Unified School District** (San Bernardino County) partnership established in September 2023; 33 classrooms, 100 percent DAC.

The Rialto classrooms were completed in April 2023, and were supplemented with in-person lesson delivery integrated into a fourth-grade field trip. The Riverside classrooms were completed in October. The program team worked with the district to incorporate Kits for Kids flexible lesson plans into scope and sequence guidance. In addition, the program delivered a webinar about the program to all teachers and held an in-person meeting with all participating principals. The Fontana classrooms are in the pipeline for completion in the 2024 program year.

Figure 39. Energy Activity Lesson During Rialto USD Field Trip



Summer Planning Activities

Since the program cannot deliver kits or lessons—or connect with teachers—during the summer months when school is not in session, additional activities were completed to enhance the program and prepare for the Fall semester. The following activities were conducted during Summer 2023:

- Kit redesign, including verification of QR code.
- Creation of Family Portal
- Materials translations (Mandarin Chinese)
- Detailed assessment of resources by behavioral program experts; input will guide 2024 program enhancements.

Regional Partners

Program staff worked with SoCalREN’s Public Agency Regional Partners that have had historically low participation in utility programs in disadvantaged communities (DAC) and rural hard-to-reach (HTR) school districts. In addition, program staff conducted direct outreach to school districts in SoCalREN territory to promote the program. The Regional Partners helped facilitate classroom enrollment in the program. Because of

their location and affiliations with local municipalities, these organizations were in a unique position to target DAC and HTR participants. The four regional partners are:

- The High Sierra Energy Foundation
- The San Joaquin Valley Clean Energy Organization
- San Gabriel Valley Council of Governments
- South Bay Cities Council of Governments

In-Language Materials

To further support participation from DAC and HTR participants, the program provided in-language content targeting specific communities who are often overlooked in energy efficiency programs. Providing educational materials, activity sheets, and measure instructions in key languages spoken throughout the region helped customers directly connect with the content and concepts and fostered connections between parents/guardians and students who worked on the activities together.

Optimization/Outlook

Over the next year, the program is set to undergo significant expansion and refinement. In the Spring Semester, there will be a heavy focus on program delivery with new kits. The program will reach 18 new classrooms and return to 136 others, with a district-wide spread in 79 districts, including specific field trip engagements. For Summer and Fall, the team's emphasis will shift toward content refreshment and recruitment for 2025. Strategies such as providing incentive flexibility are expected to play a crucial role, along with creating timelines that extend beyond kits and the fourth grade. Planning for LAUSD implementation is also on the agenda. The year will round off with remaining enrollments focusing on Riverside USD implementation.





Diamond Bar Los Angeles County

WE&T SECTOR

SoCalREN’s Workforce Education and Training (WE&T) Sector continues to contribute to the development of the skilled workforce needed to achieve the aggressive targets set by entities like the California Air Resources Board (CARB) and the Department of Energy (DOE). Collaborations with academic institutions, unions, community-based groups, and other partners help expand the program’s reach and impact.

BUILDING

Energy Capacity and Economic Resilience



302

E-Contractor Courses Completed by Contractors
15% Increase from 2022

251

Courses Completed by ACES Participants
148% Increase from 2022

40

Green Path Careers Cohort #5
300% Increase from 2022

44

Certifications Obtained by ACES Participants
175% Increase from 2022



\$52,805

Internship Dollars Earned by ACES Students
13% Increase from 2022

EXPANDING

Access to Energy Efficiency



68

Educational Institution and Industry Partners
466% Increase from 2022



48

Regional Workforce Alliance (RWA) Members
118% Increase from 2022



1,800

Future Green Leaders Summit Student Attendees
New in 2023

SoCalREN's WE&T Offerings

- The **Architecture, Construction and Engineering Students (ACES) Pathway Program** served 101 students in Title I (i.e., schools that receive targeted funding to address barriers related to poverty) designated high schools. Students receive training through dual enrollment at the community college level; the program also provides supportive services through various partners customized to the needs of each student. Student internship participation for Summer 2023 included 33 students, a 50 percent increase from 2022 participation.
- Through the **E-Contractor Program**, contractors received technical assistance ranging from capacity building, bonding assistance, RFP assistance, and other coaching services. In 2023, E-Contractor trained more than 300 small and diverse contractors on topics ranging from prevailing wages, Title 24 building energy efficiency standards, core estimating skills, access to capital, and many others.
- To build interest in clean energy careers for middle school-aged students, SoCalREN developed and launched a new initiative in 2023, the **Future Green Leaders Summit**. In its first year, the Summit attracted 1,800 student attendees from 15 participating Los Angeles Unified School District (LAUSD) schools.
- The **Green Path Careers (GPC) Program**, in its third full year of programming, assisted 40 participants, all categorized as opportunity youth and adults (this encompasses transitioning foster youth, and individuals who are unhoused, justice impacted, or hard-to-reach/disadvantaged).

Sector Modifications

There were no modifications at the sector level in 2023.

New Program Offerings

The Future Green Leaders Summit was launched in 2023 as a sub-program offering. The initiative was highly successful and will be offered as a stand-alone program in 2024.

WE&T Sector Optimization/Outlook

As state and local decarbonization funding, as well as the funding associated with the Infrastructure Investment and Jobs Act (IIJA) and Inflation Reduction Act (IRA), makes its way into local communities, SoCalREN will be ready to provide increased services to strengthen the local workforce.

Programming will maintain a focus on:

- driving equity in California's clean energy workforce,
- closing the gender gap in STEM education,
- providing opportunities for disadvantaged youth,
- bringing existing and older workers into the clean energy transition, and
- delivering services to Tribes and rural communities.

In 2024, the sector will grow from a singular program encompassing several strategies to a full sector portfolio with individual programs targeting specific audiences, including delivering WE&T services to the agriculture sector. The intended new portfolio comprises the following programs:

- ACES Pathway
- Ag WE&T
- E-Contractor Academy
- Future Green Leaders Summit
- Green Path Careers
- WE&T Opportunity Hub

WE&T Program

As discussed above, federal, state, and local climate goals require a rapid expansion of the state’s clean energy workforce. SoCalREN’s WE&T sector programs are uniquely designed to meet the needs of a wide variety of stakeholders who can help address this issue—students and teachers, employers and employees, established businesses and new start-ups. By working with a diverse range of partners and participants, SoCalREN is making life-changing impacts for businesses and individuals. Activities conducted in 2023 are described below.

ACES



Services

The 2023 Architecture, Construction, and Engineering Students (ACES) Pathway Program provided Title I high school students with dual high school and community college enrollment opportunities, bridging the gap to higher education and providing hands-on training and experience in energy efficiency and clean energy technologies. The program aims to prepare the next generation of professionals in the architecture, construction, and engineering industries for careers in the clean energy sector and support the growth of a diversified clean energy workforce in Southern California.

Figure 40. ACES Services



Objectives

ACES promotes employment in the energy sector to underrepresented groups to diversify the workforce and create a talent pipeline preparing youth for in-demand jobs and helping to meet the growing demand for skilled workers. The ACES Program achieves this through:

- **Exposure to Energy Sector:** Provides students with exposure to the energy sector, helping educate them on opportunities available to them and the types of skills and knowledge needed to succeed in the clean energy field.
- **Hands-on Experience:** Gives students hands-on experience in the energy sector, helping them to develop the practical skills and knowledge they need to succeed in energy-related careers.

- **Real-World Certifications:** Students earn certifications—like SOLIDWORKS²¹—that are recognized throughout the industry as challenging to obtain and highly valuable.

Strategies

- **Internships and mentoring** provide hands-on experience to help build knowledge and skills. Mentoring is equally important to continue developing a better understanding of the energy sector.
- **Workshops** provide students with exposure to the energy sector and accessible content knowledge.
- **Outreach and recruitment** encourage underrepresented populations to consider careers in the energy sector. Career fairs and networking events connect students with players in the energy sector and educate them on the various opportunities available.
- **Curriculum** that supports the development of the skills and knowledge required for energy-related careers.

Figure 41. ACES Field Trip to Woodbury School of Architecture



²¹ Computer-aided design, computer-aided engineering, 3D CAD design and collaboration, analysis, and product data management software. <https://www.solidworks.com/>

E-Contractor

Services

The E-Contractor Program provides training and certification for small, diverse contractors to enter the energy efficiency sector. The program aims to provide contractors with the knowledge and skills to successfully bid, design, and complete installations, including HVAC, insulation, lighting, and renewable energy systems. E-Contractor is designed to support the growth of the clean energy workforce in Southern California by providing contractors with access to training, resources, and technical assistance.

Figure 42. E-Contractor Services



Objectives

- **Economic Growth and Job Creation:** Small and diverse contractors are essential to economic growth and job creation in communities. Providing support and resources can help them grow and create more jobs in the local community.
- **Diversifying the Contractor Pool:** The construction industry has historically been dominated by large, predominantly white-owned, firms, and by assisting small and diverse contractors, SoCalREN is helping to close the racial wealth gap as well as bring in new perspectives, ideas, and approaches to the clean energy industry.
- **Addressing Historical Inequalities:** Small and diverse contractors have often faced barriers to entry and growth in the construction industry due to systemic racism, discrimination, and lack of access to resources, training, and opportunities. Technical assistance, training, and resources help address these inequalities and provide the support needed to succeed.
- **Strengthening Local Communities:** Small and diverse contractors are deeply rooted in their communities and have strong ties to local residents and organizations. Supporting local contractors helps to strengthen local community economies.

Strategies

Technical assistance is critical for small and diverse contractors to help them overcome some of the challenges they face in the construction industry. Strategies to achieve this include:

- **Building Capacity:** Technical assistance helps to build the knowledge, skills, and capacity needed to succeed in the industry. This includes training on new green

technologies, business practices, and industry standards, as well as support in bidding, project management, and financial management.

- **Overcoming Barriers:** Small and diverse contractors often face barriers such as lack of access to capital, technical expertise, and access to resources. Technical assistance helps contractors overcome these barriers by meeting with each enrolled participant on a one-on-one basis to conduct assessments.

Green Path Careers



Services

The Green Path Careers (GPC) Program provides training and job placement services for opportunity youth and adults looking to start or advance their careers in the energy efficiency and clean energy industries. Opportunity youth and adults includes transitioning foster youth, and individuals who are unhoused, justice impacted, or otherwise disadvantaged. The program's goal is to help bridge the gap between job seekers and employers in the region and support the growth of the clean energy workforce.

Figure 43. Green Path Careers Services



Objectives

GPC aims to prepare individuals for careers in the clean energy sector. The program is designed to support the growth of the clean energy industry and provide the necessary skills needed to succeed. Program objectives include:

- **Training and Education:** provide job training and education in clean energy technologies such as energy efficiency and green building practices.
- **Job Placement Assistance:** Connect individuals with employers in the clean energy industry to provide job placement and career opportunities.

Strategies

The Green Path Careers Program implements a variety of strategies to achieve objectives, including:

- **Customized Training and Education:** The Program provides comprehensive training and education to individuals interested in obtaining employment in the clean energy sector. Through customized training, employers and local workforce needs are being addressed. Soft skills training (e.g., communication, goal setting, career development, etc.) is also provided to participants.
- **Career Pathways:** The program engages opportunity youth and adults on possible careers within the clean energy sector and how to get started, providing individuals with clear career pathways and job advancement opportunities.
- **Employer Partnerships and Industry Collaboration:** Employer partnerships provide job placement and career opportunities for individuals who complete training. The program collaborates with industry leaders, trade organizations, and other stakeholders to develop and implement effective strategies for training and developing the clean energy workforce.

Future Green Leaders Summit



Services

SoCalREN, in collaboration with the Los Angeles Unified School District (LAUSD), held the first Future Green Leaders Summit (FGLS), welcoming 1,800 middle school students to the Los Angeles Convention Center on March 15, 2023.

The Summit provided innovative educational programming and allowed SoCalREN to introduce students to academic pathways and career opportunities in sustainability and the clean energy sector. SoCalREN provided full-service support to participating schools, including providing transportation, meals, and takeaway educational materials.

SoCalREN intends to expand the FGLS to its own program offering in 2024 and will seek partnerships with other school districts in coming years to expand availability of the event to additional geographic areas.

Figure 44. 2023 Future Green Leaders Summit



Objectives

FGLS was developed to provide middle school students the opportunity to gain early inspiration about a possible future career in clean energy. The one-day event is designed to give participants tools and ideas they can build upon and carry into their future. Program objectives include:

- **Build Interest in Green Careers:** The primary objective of the program is to introduce students to the wide range of career opportunities in the clean energy sector.
- **Provide Underserved Students First-Class Opportunities:** The FGLS offers students from underserved communities the opportunity to participate in a professional-style conference event complete with expo hall, keynote speakers, and interactive workshops. These activities kept a group of more than 1,800 teens and pre-teens engaged and excited throughout the event.

Strategies

The 2023 FLGS was a full-day, professional conference-format event held at the Los Angeles Convention Center that aimed to create interest and excitement among middle school students regarding clean energy careers. The event was designed to provide inspiration for students to gain further education and consider future options. Features of the event included:

- **Logistics and Support for Schools:** All logistics including transportation, educational preparation materials, and meals were provided to support participation in the event and to alleviate burden on schools and educators.
- **Keynotes and Panels:** After keynote speeches, a Women-in-Energy Panel invited students to ask questions directly to successful women with interesting and inspiring green careers.
- **Resource Fair and Interactive Workshops:** Numerous public and private sector organizations helped expand horizons by hosting booths in a resource fair and facilitating interactive workshops throughout the day. The 30-booth Resource Fair included sponsor and partner-hosted interactive booths presented by SoCalGas, SCE, Microsoft, LA Fire, LA Public Library, Build Los Angeles Community College District (LACCD) and more.
- **Green Careers Showcase:** The Los Angeles Department of Water and Power (LADWP) Society for Women Engineers, the California State University, GRID Alternatives, USGBC-LA, Long Beach (CSULB) Shark Lab, the Western Science Center, and the STEAM Legacy High School Hydrogen Car Racing Team all provided information about exciting potential green careers.

Performance

In 2023, SoCalREN’s WE&T Sector efforts ramped up sharply, expanding services to reach a total of more than 2,000 students and members of the workforce, and nearly 100 educational and employer partners. This growth is critical as our region prepares for the launch of numerous new energy efficiency and decarbonization efforts in coming years in support of local, state, and federal climate goals. The tables below provide a detailed breakdown of 2023 WE&T program results.

Table 25. WE&T Program Contractor Training and Coaching

Course Name	Number of Contractor Participants
Debunking the Myths of Being a Union Contractor	11
Construction Estimating Core Skills	62
E-Contractor Academy Level III	72
E-Contractor Academy Inland Empire	59
Incentives for Contractors	13
Prevailing Wages & Labor Compliance	27
Title 24 Part 6	33
Heat Pumps & Retrofit Construction	12
Access to Capital Workshop	13
Total	302

Table 26. ACES Certification Data

Certification Type	Number of Students Certified
ACES Programming Certificate	19
ACES Engineering Graphics Certificate	18
Certified SOLIDWORKS Associate (CSWA)	6
Certified SOLIDWORKS Professional (CSWP)	1
Total	44

Table 27. 2023 ACES Internship Data

	Number of Interns	Total Hours Worked	Total Wages Earned
In-Person Internship	11		
Virtual Internship	22	3,124.50	\$52,805.05
Total	33		

Table 28. ACES Course Enrollment

Course Title	Enrollment by High School				Total
	Alhambra	Sylmar Biotech	STEAM Legacy	Verdugo Hills	
EGD TEK 101	-	12	-	-	12
EGD TEK 102	36	-	16	-	52
EGD TEK 111	12	-	-	-	12
EGD TEK 121	8	-	-	5	13
EET 123	14	-	-	-	14
ENG GEN 101	17	-	-	-	17
MIT 220	19	-	12	-	29
Total	106	12	28	5	151

Table 29. GPC Participation

	Participants
GPC Cohort #4	10
Certifications Earned	6

Regional Workforce Alliance

The reach of the Regional Workforce Alliance (RWA) was greatly expanded in 2023. Established in to ensure stakeholder representation in planning WE&T efforts offered by SoCalREN and to drive job placements for WE&T program participants, SoCalREN added new members in 2023 bringing total membership to 55.

SoCalREN Regional Workforce Alliance 2023 Members

Build Los Angeles Community College District (BuildLACCD) • California African American Chamber of Commerce (CAACC) • California Conservation Corps (CCC) • California Council of Economic Education (CCEE) • California Hispanic Chamber of Commerce (CHCC) • California State University, Long Beach (CSULB) Institute for Innovation & Entrepreneurship • CDTech • Columbia Memorial Space Center • County of Orange Workforce & Economic Development • City of Los Angeles Council District 9 • County of Los Angeles Board of Supervisors • County of Los Angeles ISD Environmental & Energy Services • Crenshaw Chamber of Commerce • Cumming Group • Delete The Divide (County of Los Angeles) • Department of Economic Opportunity (County of Los Angeles DEO) • East Los Angeles Community College Engineering and Technologies Department • Esperanza Community Housing • Global Inheritance • Greater Los Angeles African American Chamber of Commerce (GLAAAC) • HUB Cities Consortium • Imperial County Workforce & Economic Development • Imperial Valley College • Kern County Workforce & Economic Development • LA28 • Let's Be Whole • Los Angeles Community College District (LACCD) • Los Angeles Neighborhood Land Trust • Los Angeles Unified School District • Los Angeles World Airports • Los Angeles Clean Tech Incubator (LACI) • Department of Consumer and Business Affairs Office of Small Business (County of LA OSB) • Los Angeles Local Development Corporation (LALDC) • National Association for the Advancement of Colored People (NAACP)–Inglewood/South Bay Chapter • National Association of Minority Contractors/Southern California Chapter (NAMC) • National Electrical Contractors Association–Los Angeles (NECA–LA) • Neighborhood Council Sustainability Alliance • Office of Mayor Karen Bass • Pacoima Beautiful • RootDown LA • SCE • SoCalGas • South Los Angeles Transit Empowerment Zone (SLATE-Z) • Strategic Concepts in Organizing and Policy Education (SCOPE LA) • Swinerton Builders • The Local Initiatives Support Corporation (LISC) • Trust South LA • University of California Los Angeles (UCLA) • University of California Riverside MESA Program • USC Credit Union • USC Marshall School of Business • USC MESA Program • USC Viterbi K-12 STEM Center • Ventura County Workforce & Economic Development Board • U.S. Green Building Council Los Angeles (USGBC–LA)



Chino Hills San Bernardino County

APPENDIX A: SOCALREN PORTFOLIO SUPPORTING DATA

Please review the file “Final SoCalREN 2023 Annual Report.xlsx,” uploaded to the California Energy Data and Reporting System (CEDARS, located at <https://cedars.sound-data.com/>), to view 2023 Supporting Data.

Final SoCalREN 2023 Annual Report

Tab Name	Applies to SoCalREN?
T-1 Savings&Goals	Y
T-2 Fuel Sub	Y
T-3 EnvImpacts	Y
T-4 Program Data	Y
T-5 Segment Summary	Y
T-6 Net CE	Y
T-7 Bill Impacts	N
T-8 SavingsUseCategory	Y
T-9 Commitments	Y
T-10 Cap&Target	Y
T-11 BP Metrics	Y
T-12 3P Calculation	N
T-13 3P Contract Info	N
T-14 PG&E Marketplace Metrics	N
T-15 Unique Value Metrics	Y