



# 2020 Annual Report



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## Background

The Southern California Regional Energy Network (SoCalREN) is a Program Administrator (PA) that provides energy efficiency (EE) programs and services to residents, businesses, and public agencies. SoCalREN serves customers located in the areas that receive electricity from Southern California Edison (SCE) and/or gas from Southern California Gas Company (SoCalGas®), encompassing 12 counties and a population of over 20 million.

In D. 12-11-015 (2012), the California Public Utilities Commission (“the Commission”) 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; and (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 R. 13-11-005, D. 15-10-028, and D. 18-05-041. Since its inception, SoCalREN has leveraged resources and expertise across sectors and provided turnkey solutions to advance energy efficiency in Southern California. SoCalREN achieves meaningful results and high customer satisfaction by consistently producing high-quality outcomes and remaining responsive to customer demands.

## SoCalREN Portfolio Overview

### Summary of Portfolio Performance

In 2020, SoCalREN’s EE programs collectively achieved **11,841,728 million kilowatt hours (kWh) and 2674 therms of energy savings** for the surrounding SoCalREN community and helped customers reduce monthly energy costs when many were impacted by the financial impacts of COVID-19. These electric and gas energy savings translate into positive environmental impacts through the **reduction of more than 8,406 metric tons of carbon dioxide (CO<sub>2</sub>) emissions**—the equivalent of **removing approximately 1,828 cars from the road**. Additionally, the construction projects stimulated through these programs **supported more than 215 construction jobs** across Southern California.

### COVID-19 Portfolio Impacts

The COVID-19 pandemic posed far-reaching and unpredictable challenges for many individuals and industries, and the Energy Efficiency Sector was not immune to them. Nonetheless, SoCalREN sought to alleviate the social and economic detriments of the pandemic through its program offerings. When California issued Stay-at-Home Orders in March 2020 and December 2020, all in-person SoCalREN

Program activities ground to a halt. For the SoCalREN Residential Sector, engineers were unable to perform energy audits, and contractors were unable to meet with property owners to discuss retrofit opportunities or install upgrades. Even when work was permitted in the summer, many property owners were still hesitant to make any large investments or put tenants' lives at risk. In the months that followed, the Residential Sector continued to experience setbacks such as limited access to indoor construction, equipment shortages and shipping delays, permitting office backlogs, inspection complications, and a financially constrained Multifamily market. In this uncertain environment, Program staff mobilized to help struggling renters, property owners, and EE contractors. SoCalREN responded quickly to frequent fluctuations in public pandemic response guidelines and took the initiative to find new (safe) ways to serve the SoCalREN Multifamily market.

The SoCalREN Public Sector Programs' role of supporting public agencies also became increasingly critical in 2020. The unprecedented COVID-19 pandemic created devastating impacts on the communities which public agencies serve, generating significant new barriers, such as restricted site access, and heightening existing ones, including strained budgets and limited staff resources, for public agencies to lead their communities toward a resilient, reliable, and equitable clean energy future. By adapting to rapidly changing circumstances, identifying new education and project funding opportunities, and developing innovative methods for delivering services remotely, SoCalREN helped agencies navigate and overcome these challenges, enabling them to drive energy efficiency savings, build capacity, and create more sustainable communities despite the uncertainty and financial hardship introduced by the pandemic.

## Residential Sector

Since 2013, SoCalREN has offered the Multifamily Program to property owners in its territory, providing comprehensive solutions with financial incentives to adopt energy efficient technology. **In Program Year (PY) 2020, SoCalREN delivered 1.8 Net GWh and 125,106 Net therms savings** through its Multifamily Program, benefiting nearly **6,000 tenant units** across **24 cities** in Southern California during a uniquely challenging year. Additionally, **20 percent** of the completed projects were able to participate via the new Comprehensive Common Area Path. Despite numerous hurdles resulting from COVID-19, SoCalREN was able to adapt and continue to deliver energy savings while protecting green jobs and minimizing interaction with tenant units.

The Program kicked off PY 2020 with a new and streamlined Program submission process for its participating contractors and customers. In response to COVID-19 limitations, Program staff brainstormed several alternative delivery strategies that ranged from operations and maintenance to complementary direct install measures for tenant units. From these strategies, the Program implemented the Comprehensive Common Area Path in June 2020 to reach properties that were unable to meet the 10% energy savings threshold of the traditional Whole Building Program due to lack of access to tenant units.

In addition to the new Program participation pathways for property owners, the Program offered more efficient account management support for contractors. The Multifamily Program launched a Trade Ally Portal (TAP) to help contractors organize their project document submissions and centralize communication for each project. Contractors were also offered an online learning system to build professional development skills with sales and marketing courses, as well as technical information for continuing education credits.

SoCalREN seeks to ensure that EE improvements are accessible to HTR and multifamily residents living in Disadvantaged Communities (DACs), defined in Senate Bill (SB) 535 as the zip codes experiencing the highest social and environmental justice burden based on CalEnviroScreen 3.0. Many of these disadvantaged communities were also among those hardest hit by COVID-19. **In 2020, SoCalREN was successful at providing 57 percent of total incentive dollars to properties in DACs.**

Finally, the SoCalREN Multifamily Program modified the Residential Community Coordinator (RCC) Program to adapt to COVID-19 restrictions. Initially designed as an outreach program to overcome the language market barrier with HTR and DAC customers, the RCC Program was unable to attend community events in 2020. RCC then shifted to become a sub-program of the Multifamily Program, providing in-language and marketing collateral to these customers. This shift also included connecting with existing SoCalREN Public Agencies Regional Partners, to promote the Residential Program in areas that have had low participation in the past.

## Public Sector

SoCalREN's Public Sector Programs and services are available to public agencies within SCE and SoCalGas service territories. The territory includes the counties of Los Angeles, San Bernardino, Riverside, Ventura, Inyo, Imperial, and Mono, and portions of Orange, Kern, Tulare, Santa Barbara, and Kings counties. The types of public agencies eligible for SoCalREN services include:

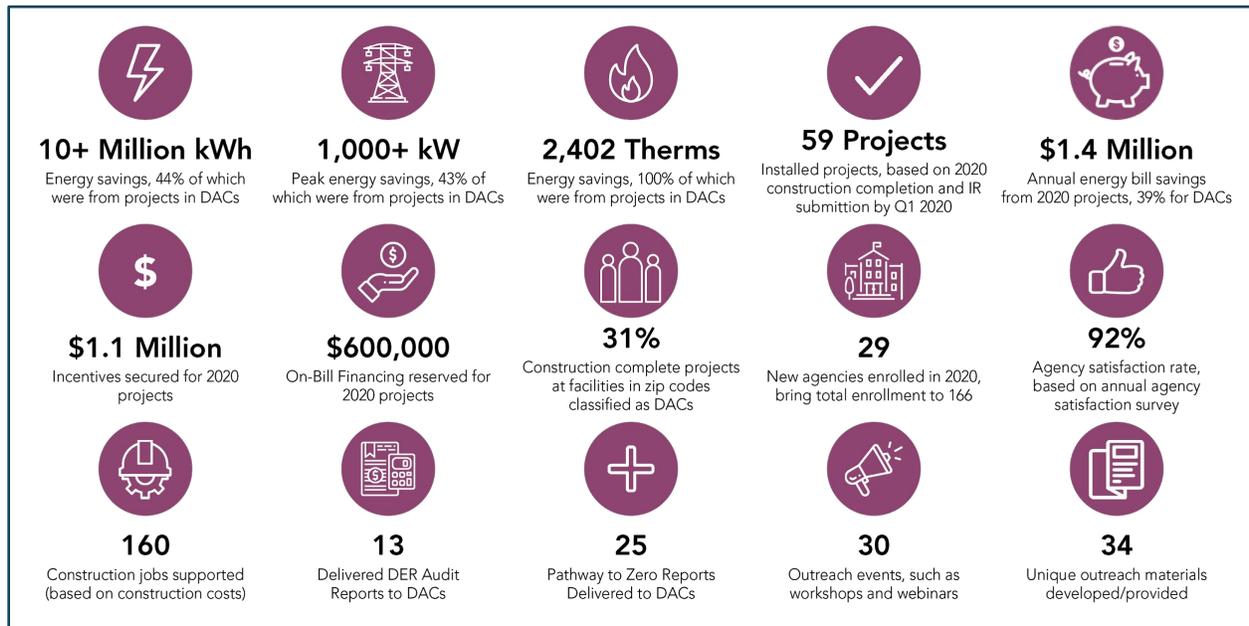
- City governments and townships
- Tribes
- County governments, including unincorporated areas under county jurisdiction
- K-12 school districts
- Water/wastewater agencies/districts
- Other public agencies (non-state and non-federal)

In 2020, SoCalREN offered three Public Sector Programs: The Project Delivery Program, Pathway to Zero, and the Metered Savings Program. Collectively, the network of agencies achieved 10,063,712

annual kWh and 2,402<sup>1</sup> annual therm savings (gross) on 59 installed projects, while working on a 24,069,932 kWh and 168,056 therms pipeline for future years.

Figure 1 shows the Program’s strategic value to public agencies and their role in fulfilling an integrated demand side program offering.

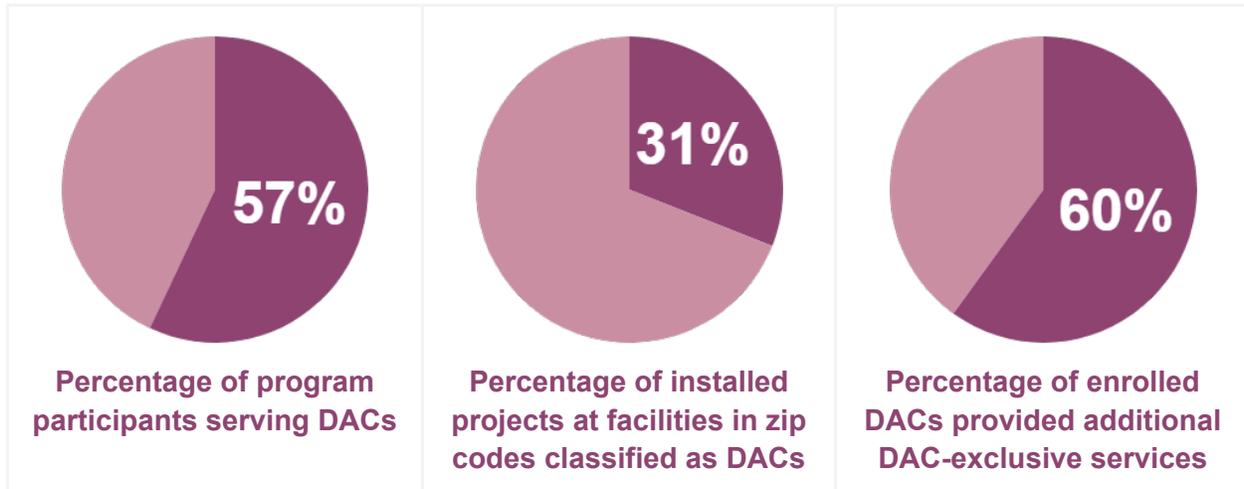
**Figure 1. Public Agencies’ Roles and Program’s Value**



The SoCalREN Public Sector Programs prioritize support to DACs. In 2020, 57 percent of program participants serve DACs, 31 percent of installed projects were at facilities in zip codes classified as DACs, and nearly 60 percent of enrolled DACs were provided additional program services uniquely offered to DACs (Figure 2).

<sup>1</sup> Includes negative therm savings of 1,626 due to interactive effects on lighting measures.

Figure 2. DAC Support



In order to further support DACs, SoCalREN enhanced program offerings and services by securing non-ratepayer funds to design and implement a Sub-Program to Pathway to Zero called Benchmarking Call to Action. The Sub-Program was made available to enrolled DACs in 2020 and provides enhanced benchmarking support and technical assistance for audits that evaluate various Distributed Energy Resources (DERs) as part of energy efficiency upgrades. Technical support beyond audits is offered on an as needed basis.

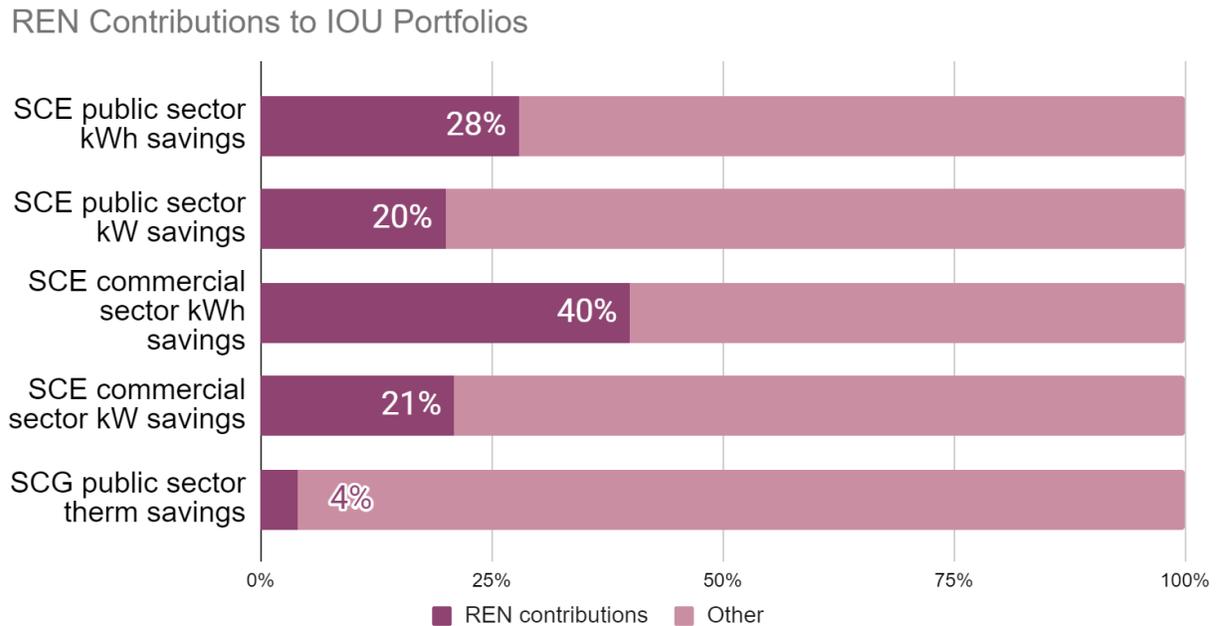
SoCalREN recognizes the importance of contributing real and persistent energy savings to help California meet its climate and energy goals. Because the EE Project Delivery Program (PDP) and Pathway to Zero are non-resource programs, SoCalREN actively channels projects into existing resource programs to demonstrate concrete impacts and savings to California.

In 2020, SoCalREN Public Sector Programs contributed to X percent of SCE’s 2020 public sector portfolio claimed savings and Y percent of SCE’s commercial sector portfolio claimed savings.<sup>2</sup> The programs contributed X percent to SoCalGas’ public sector portfolio<sup>3</sup> (Figure 3).

<sup>2</sup> This value is based on SCE’s final confirmed dashboard for the 2020 Annual Report, Public Sector value based on claimed projects flagged by SoCalREN.

<sup>3</sup> SoCalREN serves a sub-segment of the public sector; thus, the numbers delivered to SCE and SoCalGas’s portfolio do not represent a like for like comparison.

Figure 3. SoCalREN contributions to IOU portfolios



The EE PDP and Pathway to Zero also channeled savings into SoCalREN’s Public Sector Metered Savings Program and achieved 431,270 kWh and 65 kW in the program’s first full year of operation.

In addition to energy savings, the Public Sector Programs delivered a plethora of additional services (Figure 4) including outreach activities, energy use analyses, and on-site benchmarking support. In 2020, Pathway to Zero supported DACs, delivering 25 Pathway to Zero DER reports and developing 7 DER projects. The programs expanded benchmarking support and outreach activities for enrolled agencies to identify high-value energy efficiency opportunities and educate public officials on how to leverage program services to fund and implement the resulting projects.

**Figure 4. Public Sector Programs Additional Services**



30 Unique  
Outreach  
Activities



21 Comparative  
Energy Analysis  
Reports



27 On-site  
Benchmarking  
Reports

The SoCalREN Public Sector Programs also launched new initiatives to address the challenges posed by COVID-19, including:

- Conversations with SoCalREN webinar series
- Capacity Building Sub-Program
- Enhanced Energy Service Company (ESCO) coordination strategy

Beyond COVID-19 specific responses, SoCalREN also focused on two additional key initiatives: expanding program reach and identifying strategies to better support underserved communities.

These programs demonstrate how actions taken by a broad group of public agencies can drive cost-effective energy solutions in the public sector. Specifically, SoCalREN aims to inspire action that achieves the following objectives:

1. Expand the implementation of cost-effective energy efficiency projects,
2. Make energy efficiency expertise accessible and available, and
3. Integrate energy efficiency as a standard business practice for public agencies.

### **Workforce, Education, and Training Sector**

SoCalREN's Workforce Development program provides the training, tools, and skills for small and diverse participants in HTR/DACs to pursue careers and project opportunities in the Energy Efficiency Sector. In 2020, SoCalREN's Workforce, Education, and Training (WE&T) program initiatives included:

1. E-Contractor Training and Coaching
2. E-Contractor Training Academy
3. Architecture, Construction, and Engineering Students (ACES) Pathway Program

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#### 4. Green Path Careers (GPC) Program

The E-Contractor Training Academy allowed small and diverse businesses to learn about opportunities with SoCalREN programs or agencies as well as the fundamentals of the Energy Efficiency Sector for growing project opportunities. **Through the launch of the training and academy series, SoCalREN trained 75 individual contractors in order to prepare them to compete for energy efficiency projects, increase their capacity, and provide one-on-one technical assistance.**

The E-Contractor Training Academy prepared small and diverse contractors to enter the Energy Efficiency Sector by providing them the tools and foundation needed in order to compete for and perform energy efficiency projects throughout Southern California. Through the E-Contractor Training Academy, contractors can access bonding and capital resources and receive an introduction to sustainability, public contracting requirements, and how to bid on energy efficiency projects. Small, minority, and disadvantaged contractors who enroll in the E-Contractor Training Academy receive personal technical assistance unique to each individual based on their business and goals. In 2020, SoCalREN helped 75 contractors gain an understanding of what EE projects consist of and the various opportunities that are only growing in the sector.

The ACES Pathway Program provides education and career pathways for economically disadvantaged youth targeted from the 8th grade until 12th grade. The program improves educational achievement and removes barriers to higher education by co-enrolling high school students in community college courses in Science, Technology, Engineering, Art and Math (STEAM) fields. The credits students earn are transferable to campuses within the California State University and University of California systems. In 2020, SoCalREN trained 121 high school students in community college courses in ACE fields.

ACES participation also offers students paid summer internships through the Los Angeles County Summer Youth Employment Program. In 2020, 19 students were offered paid summer internships through the Los Angeles County Workforce Development, Aging and Community Services (WDACS) partnership, where students received hands-on work experience by going through industry SOLIDWORKS Certification training. With ACES, SoCalREN helps pave the way for students to secure employment in high-paying STEAM careers with an emphasis on Energy and Sustainability.

The GPC Program targets participants who are between the ages of 18 and 24 and are considered at-risk youth, consisting of foster and homeless youth. The program provides career technical education through the Building Performance Institute (BPI), offering certification training to participants. Participants are able to earn the Building Analyst, Envelope, and Infiltration and Duct Leakage certifications through an online and in-person blended training program. In 2020, SoCalREN was able to launch the pilot program and enroll the first cohort of 10 participants to begin their BPI training.

The GPC Program also offers participants the opportunity to participate in the Paid Work Experience Portion, which serves as an internship program, funded through a partnership with Los Angeles County WDACS, in which participants receive 120 hours.

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The GPC Program provides Transition Aged Youth (TAY) access to the emerging Energy Efficiency Sector by offering education, training, and work experience in the field. This initiative is made possible through collaboration between the SoCalREN, San Gabriel Valley Council of Governments (SGVCOG), WDACS, and Hathaway-Sycamores Child and Family Services. The program is designed to address the barriers TAY face when aging out of the foster care system and moving into the growing workforce, while addressing the EE workforce expansion needs. GPC aims to assist TAY youth by eliminating the barriers of the EE workforce sector, by providing certification training, supportive services, and the coaching needed to emerge successful and begin their EE career. The GPC program provides a multi-step approach that assists a participant in entering the EE workforce from the initial recruitment phase to becoming Job/Career Ready.

SoCalREN's Workforce Development Program continually pursues new ways to provide greater training to under-represented individuals, and tailored training and assistance to diverse contractors performing energy efficiency project work.

## Finance Sector

### Overview

#### Multifamily Finance Program

The Multifamily Finance Program (MFF Program or Program) broadens access to finance for more multifamily property owners/contractors for energy efficiency upgrades by allowing a financial institution partner to modify its underwriting criteria and accept more risk than it would otherwise on qualified projects. The program design incorporates an Energy Service Agreement which provides off balance sheet funding for equipment replacement and preventative maintenance with monthly payment based on energy savings. Additionally, the design incorporates features that make the program process easy for the borrowers, financial institutions, contractors, and the administrator, therefore encouraging investments in energy efficiency.

#### Revolving Savings Fund

SoCalREN's Revolving Loan Fund, publicly known as the Revolving Savings Fund (RSF), was designed to support energy projects by providing up-front construction financing for agency facilities utilizing SoCalREN's services. The RSF aims to accelerate energy upgrades that would otherwise be delayed pending budget allocation by providing the funds for approved but not-yet-budgeted projects. RSF provides unique, cross-cutting, short-term, up-front construction financing for small to midsize projects at zero percent interest. It can be paired with other financing options such as on-bill financing (OBF), incentives or rebates, and other external financing options such as California Energy Commission (CEC) loans. The RSF is a catalyst for agency enrollment and project development that prioritizes serving DACs.

Throughout 2020, the Program focused on targeted agency outreach and engagement to increase participation. To further drive program interest and uptake, SoCalREN rebranded the Revolving Savings Fund in Q4 2020, and rolled out several program enhancements and modifications. All modifications were made based on agency feedback, and the changes created excitement within the sector. By the end of 2020, SoCalREN submitted three RSF applications to reserve the full \$2.2 million in seed funds granted by the CEC.

## Portfolio Optimization and 2021 Outlook

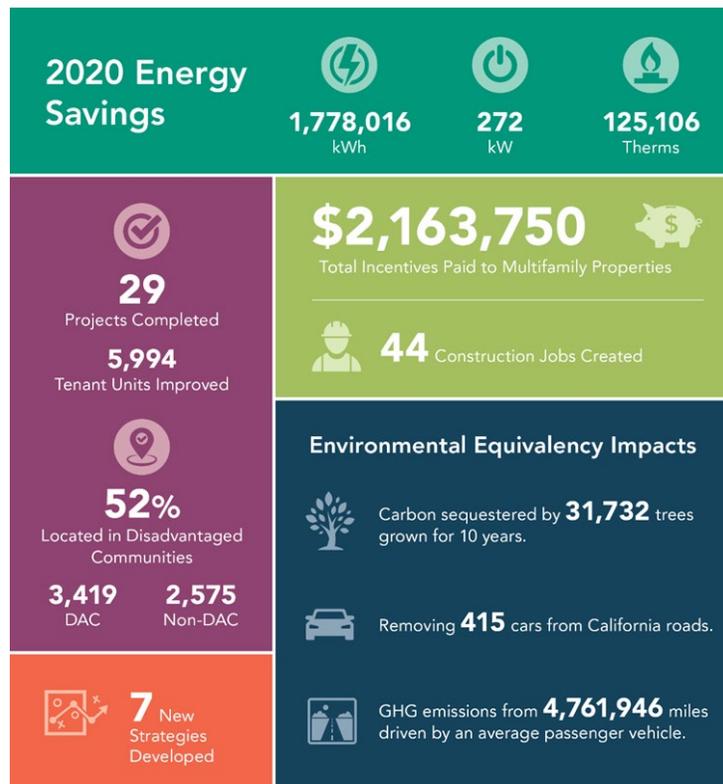
Since Governor Newsom's Stay at Home Order was implemented in 2020, the programs in SoCalREN's rolling portfolio have learned to adapt their program services from the impacts of COVID-19. As California continues its path to fully reopen, SoCalREN will improve ways to serve residents, businesses, and agencies, while keeping their health and safety a top priority. Additionally, SoCalREN's sectors will collaborate and incorporate strategies to increase cost effectiveness by leveraging partnerships with agencies to be knowledgeable about all of the available portfolio programs for customers in their regions. SoCalREN will provide training opportunities for trade allies, creating a pathway for education that will have longer lasting impacts for the energy efficiency market and workforce. SoCalREN's programs will continue to identify and fill service gaps from partner IOUs within its territory, by developing a business plan to implement innovative programs and outreaching to better serve customers and agencies in the future.

# Residential Sector Programs

## Overview of Sector Performance

The Residential Sector programs provided more comfortable, energy efficient, and safe living environments for tenants in 29 properties throughout the SoCalREN territory in 2020. These improvements impacted 391 buildings and nearly 6,000 tenant units. More than half of program results came from HTR customers and properties located in DACs. The Whole Building and Comprehensive Common Area paths achieved combined net energy savings of 1,778,016 kWh and 125,106 therms. This equates to a greenhouse gas (GHG) emissions savings of 4,761,946<sup>4</sup> miles driven by an average passenger vehicle. Figure 5 highlights more of the social, environmental, and economic benefits that SoCalREN produced in 2020.

Figure 5. Residential Program Impacts<sup>5</sup>



<sup>4</sup> <https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator>

<sup>5</sup> <https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator>

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The COVID-19 pandemic posed far-reaching and unpredictable challenges for many residents and industries, and the Energy Efficiency Sector was not immune to them. Limited access to indoor construction, equipment shortages and shipping delays, permitting office backlogs, and a financially constrained Multifamily market undeniably impacted SoCalREN energy savings. The California Stay-at-Home Order issued in March 2020 halted in-person program outreach efforts. As a result, contractors were unable to meet with property owners to discuss retrofit opportunities. When work was permitted in the summer, many property owners were still hesitant to make any large investments and put tenants lives at risk.

The Multifamily Program developed several strategies to prioritize customer safety, devising solutions to implement state and local pandemic safety restrictions and practices while accommodating and supporting a struggling EE workforce. These strategies included programs such as operations and maintenance, a benchmarking pilot, self-install kits for tenants, an express rebate path, and a homeowner’s association strategic energy management path. In the end, the program decided that a Comprehensive Common Area Path, which allows properties to make upgrades in areas outside of tenant units, was the best option for the SoCalREN Multifamily market. Additionally, a program focusing on childhood education about energy efficiency, Kits for Kids, also was selected to be implemented for the region in PY 2021.

In 2020, the SoCalREN Residential Program focused on customer safety and contractor support by implementing the following:

- Providing virtual audits and streamlined Program submission process via an online portal.
- Increased Program incentive caps to alleviate contractor and property cashflow challenges.
- Offering a free online learning platform for contractors to gain technical, sales, and marketing skills to help grow their business.
- Expanding contractor recruitment and training efforts to support the EE workforce and diversify the SoCalREN portfolio.
- Creating a partnership between regional partners that outreached to contractors and property owners that serve DACs and HTR communities.
- Offering Program documents and tenant collateral in multiple languages, making information about EE upgrades accessible to a wider audience.

By developing new strategies and offering the Comprehensive Common Area Path, the Multifamily Program was able to provide utility bill savings to more tenant units than would have been possible with the standard Whole Building Path. Additionally, the properties were given the opportunity to pursue phased installation, completing some retrofits in 2020 and finishing others in 2021. The Program ensured that properties located in DAC zip codes were able to benefit from energy efficiency improvements, with 52 percent of participating units located in these communities in 2020.

As Table 1 showcases, the Program was more successful with therm savings goals. This is because many gas savings measures, such as boilers and high efficiency water heaters, are located in common areas, and were able to be installed safely following social distancing guidelines.

**Table 1. 2020 Program Results**

	Goal	Achieved	Percent of Goal
Number of Installed Projects	50	29	58%
Number of Residential Dwelling Units Impacted	8,500	5,994	71%
kW (First-Year Annual Gross)	1,507	335	23%
kWh (First-Year Annual Gross)	8,212,699	2,376,711	29%
Therms (First-Year Annual Gross)	252,749	159,528	63%
kW (First-Year Annual Net)	1,120	272	24%
kWh (First-Year Annual Net)	6,231,734	1,778,016	29%
Therms (First-Year Annual Net)	190,573	125,106	66%

The Multifamily Program also supported the EE workforce in 2020 by recruiting new Active Trade Allies. Program account managers provided individualized support and training so that all contractors could participate successfully in the Program. As a result, SoCalREN tripled the number of participating contractors from the previous year, exceeding the initial goal of 10 contractors. With more Active Trade Allies, SoCalREN is better positioned to increase future outreach activities and reach higher levels of property engagement. Table 2 shows the number of contractors that joined the program in comparison to 2019.

**Table 2. Participating Trade Allies**

	2019	2020
Active Trade Allies	5	17
# of Trade Allies with Completed Projects	5	8

The Multifamily Program completed upgrades to 5,994 tenant units in 2020. Over half of those, 3,419, were located in DAC zip codes in Los Angeles, Orange, San Bernardino, and Riverside counties. As Figure 6 shows, most of the net kW and therms savings reported by the Program came via these properties.

Figure 6. DAC and Non-DAC Results



The unique value of the SoCalREN Residential Program is that it offers properties the opportunity to install electric and gas efficiency measures that fit their property type. Table 3 lists the most common measures installed at properties in both DAC and Non-DAC properties in the past year. Both location types show similarly installed measures, with lighting as the most common measure for a second year in a row, installed at nearly all properties.

Table 3. Top Measures Installed in 2020

Top 10 Measures Installed in 2020	
DAC Properties	Non-DAC
Exterior Lighting*	Exterior Lighting*
Interior Lighting*	Interior Lighting*
Low Flow Water Fixtures and Showerheads	Smart Thermostat
DHW Pipe Insulation Wrap	Low Flow Water Fixtures and Showerheads
High Efficiency DHW	Variable Speed Pool or Spa Pump
Smart Thermostat	Lighting Controls
Lighting Controls	DHW Pipe Insulation Wrap
Variable Speed Pool or Spa Pump	High Efficiency DHW
Pool or Spa Heater Timer	Pool or Spa Heater Timer
Pool or Spa Timer	Pool or Spa Timer
*Common Area, In-Unit DHW = domestic hot water	

## Sector Modifications

### New Program Offerings

#### Comprehensive Common Area

In response to COVID-19, SoCalREN implemented the Comprehensive Common Area Path to minimize contact with property residents. This path provides incentives based on project cost. The incentives are paid at 35 percent of project cost for non-DAC properties, and 45 percent of project cost for DAC properties.

This path is exclusively focused on common area projects that meet the following requirements:

- Building must have at least five attached units.
- Retrofit must include a minimum of two EE measures, with at least one being an electric measure (a list of eligible measures is shown in Table 4).
- Customers must receive service from SCE for electricity and SoCalGas for gas.
- Installed measures must achieve a minimum of 4 percent and maximum of 10 percent energy savings.
- Permits are required, if applicable, by the jurisdiction and/or SB 1414.

**Table 4. Eligible Common Area Measures**

Common Area Eligible Measures	
Lighting	Common Area Lighting
Central DHW	Insulated exposed domestic hot water piping Domestic low water recirculation controls
Pool and Spa	Programmable pool and spa pump controls High efficiency pool and spa heater Timer on pool and spa heater Pool covers
Laundry	ENERGY STAR® Clothes Washer

To launch the Comprehensive Common Area Path, account managers reached out to trade allies individually, and the Program made an announcement in the SoCalREN July 2020 newsletter. Additionally, trade allies were provided with collateral like the one shown in Figure 7 to share with property owners, explaining how tenant safety was a top priority and could still make their buildings more energy efficient.

Figure 7. Marketing Collateral for Comprehensive Common Area

**Southern California REGIONAL ENERGY NETWORK**

SoCalREN Multifamily Program  
Comprehensive Common Area

### Upgrade Your Property In a Safe and Simple Way While Maintaining Social Distancing

Add value to your property and reduce maintenance costs with the Southern California Regional Energy Network (SoCalREN) Multifamily Program. The Comprehensive Common Area approach helps properties enjoy the benefits of an energy efficiency upgrade while minimizing contractor and staff interaction with tenants.

**Participate in Four Easy Steps**

- 1. Access No-Cost Consulting**  
An energy consultant from the SoCalREN team will work with you remotely to complete an intake process and identify specific measures.
- 2. Get an Assessment**  
An energy assessment will identify the opportunities to upgrade the energy efficiency of your property's common areas.
- 3. Make Improvements**  
Have a licensed, qualified contractor install energy efficiency measures. Some measures may be self-installed (contact the Program for more details).
- 4. Receive Incentives**  
Earn an incentive for project costs established by the Program's allowable cost database. The incentive amount is 45% of project cost for projects located in Disadvantaged Communities (DAC) and 35% for Non-DAC projects.

**Enjoy the Benefits**

- Use our simple intake process to minimize the time Program team members spend on site.
- Enjoy reduced operating and maintenance costs.
- Contribute to regional environmental improvement goals.
- Access financing and incentives.

**Confirm Your Eligibility**

To participate in the Program, your multifamily projects must meet the following criteria:

- Be in a property served by Southern California Edison (SCE).
- Be in a building that contains a minimum of five connected units.
- Include at least two eligible energy efficiency measures, one of which must be an electric measure.
- Achieve between 4% and 10% improvement in energy efficiency.
- Reach project completion and approval within 12 months of the date of reservation.

**Get Started!**

Visit [socialren.org/multifamily](https://socialren.org/multifamily)  
Email [multifamily@socialren.org](mailto:multifamily@socialren.org)  
Call (877) 785-2237

[socialren.org/multifamily](https://socialren.org/multifamily)

To alleviate any safety concerns of the tenants, the Program also provided all projects with support materials to be displayed on property by the contractors. Customers received letters informing them of the construction at the property as well as tip sheets, tenant notification door hangers, lobby signs, and refrigerator magnets (Figures 8–10) to support the project and provide tenant education. Marketing materials were also made available in additional languages for tenants with higher populations of Spanish and Chinese speakers, to address language barriers in understanding the retrofit while maintaining social distancing regulations.

Figure 8. Tenant Notification Letter



Southern California  
REGIONAL ENERGY NETWORK

SoCalREN Multifamily Program

We are currently making building updates through the SoCalREN Multifamily Program to improve energy efficiency at this property. **Contractors or building maintenance staff may briefly enter your individual unit to install energy-saving measures.**

All contractors working on our energy efficiency upgrade have been instructed on the latest COVID-19 safety guidelines. If you would like to learn more about these guidelines, you may visit [socialren.org/covid19](https://socialren.org/covid19).

Please contact property management if you have any questions.

---

Estamos haciendo reformas en el edificio a través del Programa Multifamiliar SoCalREN para mejorar la eficiencia energética en la propiedad. **Es posible que los contratistas y el personal de mantenimiento tengan que entrar momentáneamente en su unidad para la instalación de medidas de ahorro energético.**

Todos los contratistas que trabajan en estas reformas de eficiencia energética han sido formados en las últimas normativas de seguridad relacionadas con el COVID-19. Si desea saber más sobre estas normativas puede visite [socialren.org/covid19](https://socialren.org/covid19).

Si tiene cualquier pregunta puede contactar con la administración de la propiedad.

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我们目前正在通过SoCalREN多户型项目来为此建筑升级，以提高房屋能源效率。我们将只会在房产的公共区域施工，承包商不会进入您个人的住所单元。

所有负责能源效率升级工作的承包商已经接受最新的新冠病毒防护安全准则的训练。如果您想进一步了解这些准则，可以访问[socialren.org/covid19](https://socialren.org/covid19)。

如果有任何问题请联系物业部门。

Figure 9. Tenant Magnets



**Maneras fáciles de ahorrar energía y dinero**

-  Apague las luces cuando salga de una habitación, y use bombillas LED certificadas por ENERGY STAR®.
-  En el verano, cierre las persianas o cortinas durante el día para bloquear el calor del sol. En el invierno, abra las persianas o cortinas durante el día para dejar entrar el calor.
-  Báñese en la ducha en lugar de la tina para usar aproximadamente 50% menos agua.
-  Desconecte los electrodomésticos y dispositivos electrónicos cuando no estén en uso o cargando.
-  Prenda el lavaplatos solo cuando esté lleno, y considere dejar que los platos se sequen al aire libre.
-  Mantenga la temperatura del refrigerador entre 38° y 42°, y mantenga despejada el área alrededor del ventilador del congelador.

[socalren.org](http://socalren.org)

Figure 10. Tenant Door Hanger



By implementing the Comprehensive Common Area Path, the projects achieved a savings of 237,622 net kWh and 10,452 net therms. This equates to 28,389,023 smartphones being charged and 48 passenger vehicles being driven for one year.<sup>6</sup>

<sup>6</sup> <https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator>

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**Table 5. Comprehensive Common Area Program Participation Results (2020)**

Comprehensive Common Area Program Results 2020					
	Number of Projects	Annual Net kWh Savings	Net Peak kW Savings	Annual Net Therms Savings	Improvement Incentives Paid
Non-DAC	2	84,936	5	4,557	\$36,133
DAC	4	152,686	9	5,895	\$191,345
<b>Total</b>	<b>6</b>	<b>237,622</b>	<b>14</b>	<b>10,452</b>	<b>\$227,478</b>

## Program Modification

### Regional Community Coordinator

The RCC Program was created in late 2019 to engage multifamily customers whose primary language was not English, making information more accessible to the HTR communities and DACs. The RCC Program provided these customers with a single point of contact in their native languages, supporting them during the Multifamily Program process and aiding their completion of EE upgrades. The RCC Program was designed to reach property owners and trade allies through the following channels:

- Seminars and workshops about the residential program and EE education.
- Tabling and presentations at community events.
- Meetings and presentations to community-based organizations public agencies.

The RCC Program objectives include providing translation services in Spanish, Vietnamese, Chinese, and Korean, as well as recruiting contractors in DACs to attract HTR property owners to the Multifamily Program. To promote the Program, RCC focuses on increase marketing, education, and outreach efforts in these communities through the channels listed above. However, due to COVID-19, in-person outreach was not feasible in 2020. After discussing different strategies, RCC was moved to a sub-program of the Multifamily Program, rather than a standalone program. Program staff began phone outreach to property owners and contractors in DAC zip codes, promoting the Multifamily Program and Comprehensive Common Area Path, and the benefits of becoming a participating trade ally. Additional criteria for outreach included small property owners with 50 units or less, with buildings built in 2005 or earlier.

In addition to outreach, the RCC Program staff translated marketing collateral, including Program presentations, contractor and customer outreach materials (Figures 11 and 12), and COVID-19 guidance. Customers were provided a toll-free number in these materials, which stated that RCC offered support in Chinese (Mandarin and Cantonese), Vietnamese, and Spanish. Finally, the program placed an ad in the Chinese language publication *World Journal*, which is widely read by customers in Southern California.

Figure 11. Contractor Outreach Flyer Translated – Available in Spanish



Únase al programa multifamiliar SoCalREN



**Los contratistas participantes reciben:**

- Acceso a una base de clientes expandida.
- Soporte desde un único punto de contacto dedicado.
- Capacitación gratuita, tutorial y materiales de marketing.
- Acceso al servicio de Consultoría y consejería sin costo.

### ¡Haga crecer su negocio convirtiéndose en un contratista participante!

A través del programa multifamiliar SoCalREN, los contratistas participantes pueden ofrecer a sus clientes dueños de propiedades multifamiliares incentivos para compensar el costo de las actualizaciones de eficiencia energética. Si trabaja en HVAC, iluminación o calefacción de agua, puede trabajar con SoCalREN para hacer crecer su negocio en el mercado multifamiliar.

#### ¿Por qué unirse?

##### Ofrezca a sus clientes incentivos y beneficios

- Hasta \$1,200 por unidad para mejoras calificadas en una propiedad elegible.
- Medidas mejoradas que incluyen iluminación interior, iluminación exterior, calentamiento de agua, aislamiento de tuberías, HVAC y más.
- Reducción de los costos operativos continuos y mayor comodidad, salud y seguridad para los inquilinos.
- Ofrezca a sus clientes un camino hacia una mayor sostenibilidad y gestión ambiental.

##### Obtenga beneficios para su negocio

- Mayor visibilidad como contratista participante que trabaja con el programa multifamiliar SoCalREN.
- Base de clientes ampliada con servicio de valor agregado.
- Mayor alcance y volumen con los servicios actuales
- Habilidades técnicas mejoradas para su fuerza laboral
- Mayor visibilidad para los clientes con la publicidad del programa y la presencia de eventos.

##### Acceda a la ayuda para garantizar su éxito

- Uno a uno soporte del gerente de cuenta.
- Asistencia de marketing.
- Soporte técnico del equipo de ingeniería del programa.
- Convenientes recursos de capacitación en línea para su equipo.



[socalren.org/multifamily](https://socalren.org/multifamily)

Figure 12. World Journal Advertisement

Southern California  
REGIONAL ENERGY NETWORK  
洛杉磯縣管理 南加州區域能源網

**比以往更好**  
SoCalREN 主要幫助擁有多單位 租戶業主/ 管理經理  
集體節能建築綠化為主要目標  
通過 經濟獎金/ 抵消成本效益  
幫助更多租戶舒適節能和降低業主維修成本  
電話：(888) 898-6788 • 電郵：multifamily@socalren.org

SoCalREN 由洛杉磯縣管理/加州公共事業委會協助：加州公用事業用戶提供資金

[socalren.org/multifamily](https://socalren.org/multifamily)

## Program Performance

Prior to pandemic restrictions, the Program was able to perform outreach at two community events in the SoCalREN territory.

Figure 13. 2020 Spring Festival in Rowland Heights



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Figure 14. 2020 Lunar New Year Celebration in Pomona



The RCC Program staff also strategized alternative ways to connect with HTR and DAC customers as in-person outreach was limited. In 2020, the Program began partnerships with four regional partners that currently work with SoCalREN’s Public Sector. These regional partners are community-based organizations and local governments that are in areas of SoCalREN’s territory that traditionally have a lack of customer participation. These partners worked with the RCC Program to develop outreach strategies that are suited for their region to promote the Multifamily Program. By the end of 2020, four of these partners joined efforts with the RCC Program to expand the Residential Program’s marketing efforts.

**Table 6. RCC Program Results**

<b>Residential Community Coordinator Program Performance</b>	
Community Events	2
# of Customers Outreach Community Events	139
Property Owner Phone Outreach	206
Contractor Phone Outreach	121
Regional Partnerships Formed	4

### **Program Optimization and 2021 Outlook**

As we continue to live with the pandemic, SoCalREN anticipates any Program in-person outreach will be limited. The RCC will reach HTR customers and property owners with increased incentives living in DAC zip codes with the aid of our regional partners, as mentioned above. This will include identifying potential introductions to contractor and community groups for SoCalREN Program presentations, as well as virtual invitations to local events and meetings attended by potential Program participants. The RCC will provide marketing collateral for distribution in multiple languages and pre-developed content that is easily shareable in publications and social media.

## **Multifamily Program**

### **Program Description**

The SoCalREN Multifamily Program helps property owners upgrade facilities through EE retrofit projects that improve living conditions and reduce energy costs for residents. The Program provides business opportunities for contractors who complete upgrades at participating properties. In addition to the cost-saving benefits of EE (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, from large corporate operations with multiple property sites to individual owners of single properties. 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. EnergyPro Lite and EnergyPro 5 are the modeling tools used to calculate

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energy savings. As-built conditions are captured during the initial assessment, and recommendations are made based on the observations made during the assessment. All potential opportunities are modeled in EnergyPro or EnergyPro Lite with the intent to provide a package of recommendations that maximize energy savings. 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. The Comprehensive Common Area Path was introduced in 2020, and is described in further detail above.

### Program Services

The Program offers many services to support multifamily customers with EE projects, including:

- Technical support, including energy assessments, identifying energy efficiency improvement measures, and EnergyPro/EnergyPro Lite modeling of energy savings.
- Project management and other staff support throughout EE projects.
- Contractor training to install Program measures and deliver Program savings.
- Project inspection to validate all equipment is installed and operational.
- Tenant educational materials in a variety of languages.

The Program also offers participating contractors with services to help them market the Program to their customers:

- 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.

All support is available remotely to comply with local health orders and safety guidelines.

### Program Objectives

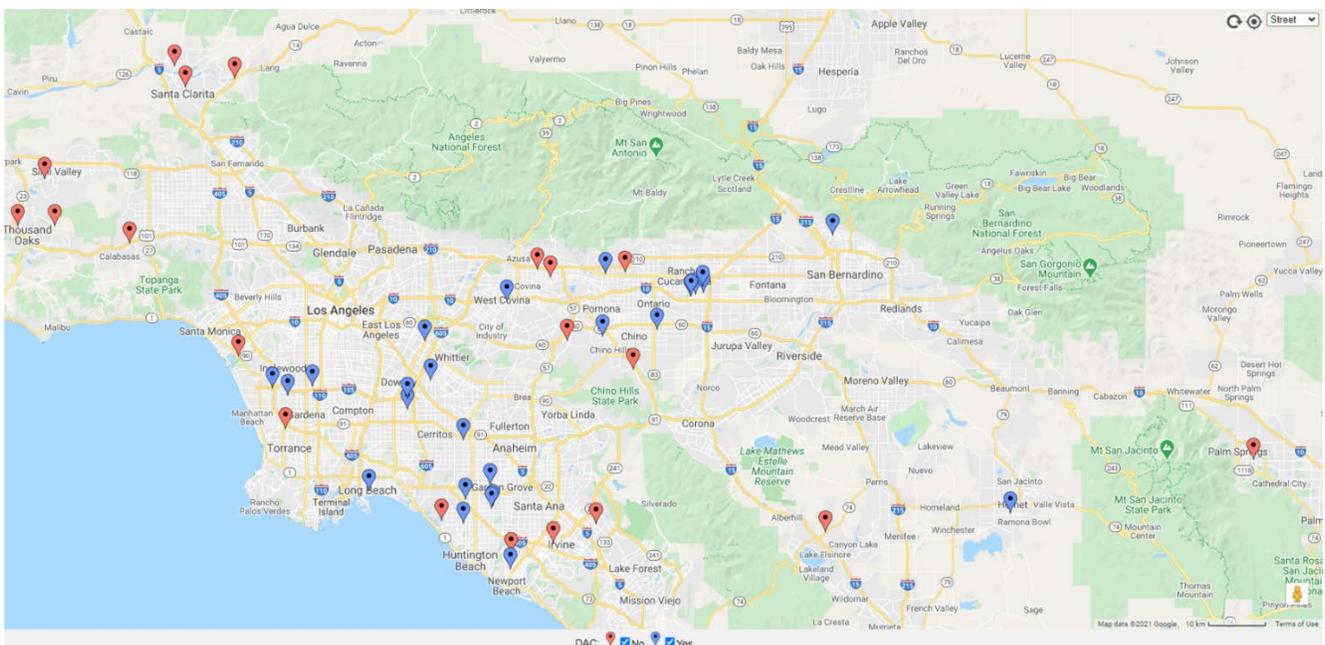
- **Drive SoCalREN Portfolio Cost Effectiveness:** The Multifamily Program offers a streamlined approach to achieving energy savings to ensure the overall SoCalREN maximizes cost effectiveness.
- **Deliver Comprehensive Energy Saving Projects:** To best serve the mission of SoCalREN, the Multifamily Program engages contractors, building owners, and tenants to identify and implement energy savings opportunities through comprehensive retrofit projects.
- **Achieve High Participation in HTR and DAC Customer Groups:** The Program goal is to achieve at least 50 percent participation in DAC zip codes.

- **Drive Energy Efficiency Upgrades in All Building Types/Sizes:** The Program serves the entire SoCalREN Multifamily market, from large, corporate-owned portfolios to small, individually owned and managed multifamily properties (minimum size of five units).
- **Develop, Enhance, and Expand the Energy Efficiency Service Provider Market Serving SoCalREN Multifamily Properties:** The Program fosters the growth of service providers supporting the Multifamily market at every level of building, project size, and complexity in order to facilitate the installation of comprehensive projects.

### Program Performance

The SoCalREN Multifamily Program helps property owners learn about EE opportunities at their properties. Part of that education includes providing property owners with a comprehensive energy assessment. Data is collected about the property, including its size, number of units, and existing equipment information. This information is input into energy modeling software to estimate the amount of savings that can be achieved at the property by participating in the Program. In 2020, the Program completed Energy Assessment Reports at 48 multifamily properties throughout the SoCalREN territory, in Los Angeles, Orange, Riverside, San Bernardino, and Riverside counties. Figure 15 shows the spread of completed assessments in these counties, with more than half located in DACs (featured in blue). Due to COVID-19 setbacks and other challenges, many of these properties could not complete projects in 2020. However, 14 of these projects with completed Assessment Reports have carried over into the next Program year, creating a sizeable pipeline for 2021.

**Figure 15. DAC vs. Non-DAC Completed Assessment Reports**



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Nearly all the projects completed in 2020 had their Assessment Reports completed the same year; this was due in part to 2019 finishing strong and thus the Program entered 2020 with a limited pipeline. Tables 7 and 8 show the number of Completed Assessments and Projects. Of the 29 projects finished in 2020, 93 percent received their assessments the same year, with 7 percent carrying over from 2019 or earlier.

**Table 7. Number of Completed Assessments (2020)**

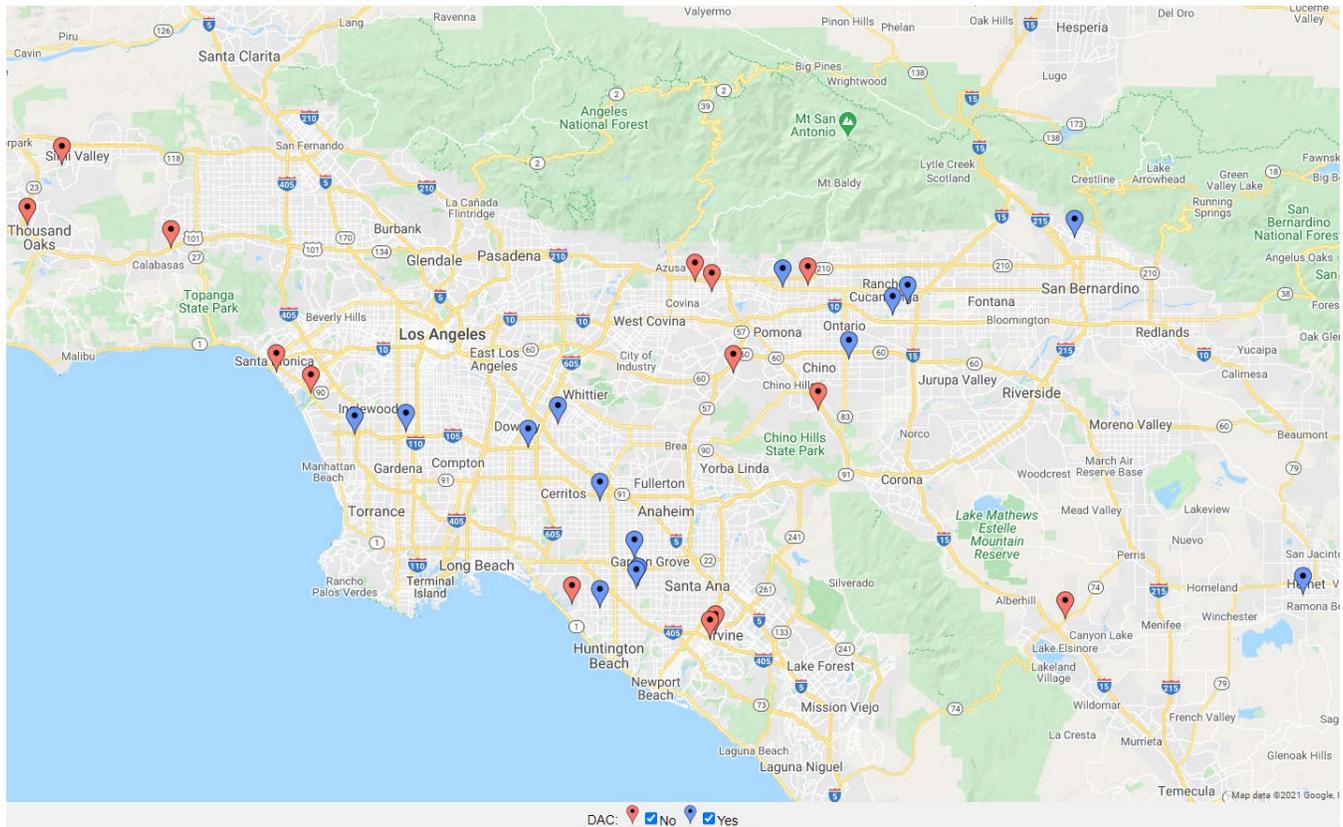
County	Assessment Reports Completed (# of Projects)	DAC	Non-DAC
Los Angeles	21	10	11
Orange	12	7	5
Riverside	3	1	2
San Bernardino	9	8	1
Ventura	3	-	3
<b>Total</b>	<b>48</b>	<b>26</b>	<b>22</b>

**Table 8. Project Implementation Performance**

Project Implementation Performance	
Number of completed projects*	29
Percent of projects completed at properties that serve disadvantaged communities <sup>7</sup>	52%
<i>*Projects are defined by 2020 construction completed projects with installation reports submitted in 2020 or Q1 2021.</i>	

<sup>7</sup> As defined by CalEnviroScreen 3.0

Figure 16. DAC vs Non-DAC Completed Projects



In 2020, the SoCalREN Residential Program claimed 1,778,016 in net kWh and 125,106 net therms. The regional results by county are displayed in Table 9.

Table 9. Regional Energy Savings Results

County	Population	Projects	Net kWh	Net Therms
Los Angeles	10,283,729 (54%)	12	477,568 (27%)	43,373 (35%)
Orange	3,284,468 (17%)	8	702,225 (39%)	41,645 (33%)
Riverside	2,415,955 (13%)	2	68,813 (4%)	3,037 (2%)
San Bernardino	2,174,938 (11%)	5	451,262 (25%)	28,834 (23%)
Ventura	859,073 (5%)	2	78,148 (4%)	8,218 (7%)
<b>Total</b>	<b>19,018,163</b>	<b>29</b>	<b>1,778,016</b>	<b>125,106</b>

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Completed projects received window clings to proudly display at their properties (Figure 17). This was also made available in a digital format for properties to display on their website for potential tenants to view.

**Figure 17. Window Clings Available for Participating Contractors**



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 2020 provided significant financial savings to multifamily properties (Table 10).

**Table 10. Financial Benefits to Multifamily Properties**

Financial Benefits to Multifamily Properties	
<b>Annual utility bill savings for all properties (and DACs)</b>	\$519,940 (\$228,041 in DACs) <sup>8</sup>
<b>Total value of projects completed</b>	\$4,130,022
<b>Total incentives paid</b>	\$2,163,750

The Program strives to support construction jobs. This Program goal is measured by completed projects' gross construction costs. The 2020 gross construction costs of \$4 million<sup>9</sup> translate to 44 construction jobs supported.

<sup>8</sup> Based on U.S. Energy Information Administration average California utility costs of \$0.1797 per kWh.

<sup>9</sup> Construction conversion to jobs = Gross Project Cost/\$92,000.

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## Program Modifications

- Increased Non-DAC incentives from 50 to 60 percent and advertised increased incentives in local apartment publications and online advertising from Google and Bing.
- Limited in-person inspection to vacant units, common areas, and/or exterior spaces.
- To accommodate for the Stay-at-Home order, the Program implemented virtual audits.
- Whole Building Path allowed for self-install to minimize COVID-19 spread.
- Expanded Pipeline Management implemented a customer relationship management (CRM) system for Program staff to manage leads and identify potential properties for the Program, as well as created automated reports for easier tracking of project statuses.

Figure 18. Online Advertisement for New Incentives



## 2020 Strategies

### Contractor Recognition and Kickoff

The SoCalREN team kicked off 2020 by celebrating the participating contractors' efforts for their achievements in 2019. A free luncheon was provided, and several contractors received 2019 Contractor Excellence Awards, as shown in Figure 19. Contractors were also provided another training

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of the Program’s intake form and introduced to the new TAP and Energy Efficiency Learning Center (EELC), which are discussed below.

**Figure 19. American Power Solutions Receiving the Contractor Excellence Award**



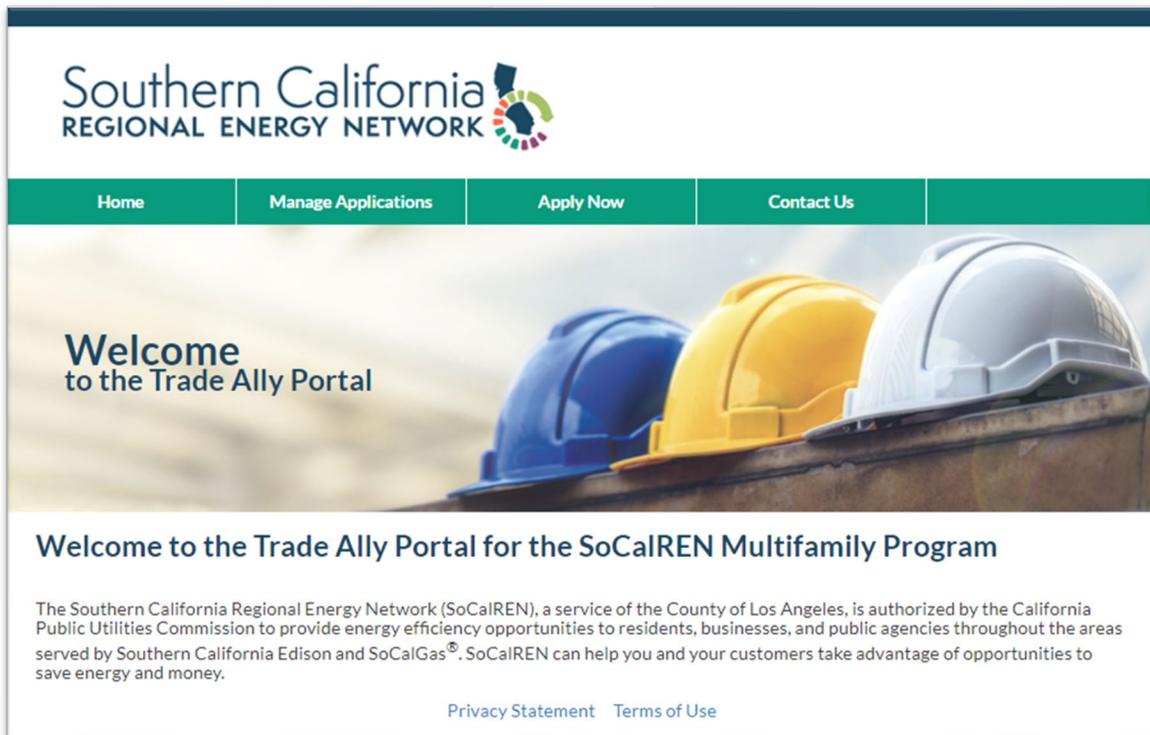
## Trade Ally Portal

In 2020, the SoCalREN TAP was launched as an online application and submission portal. Interested contractors can now create an online application and apply to become a participating contractor. Additionally, the TAP allows contractors to upload all project documents safely and securely. In previous Program years, contractors sent program documents via email for each individual project, and with the TAP, contractors can easily manage their project tasks in one central location. In addition, by using the TAP, the Program complied with the California Privacy Rights Act of 2020, making transfer of personally identifiable information (PII) more secure. Additionally, the TAP allowed contractors to see the status of their projects at their convenience, optimizing time to focus on projects for both themselves and program staff. Existing contractors were given individual training for the TAP, and all

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new contractors were required to take this training before becoming a participating trade ally in the Program.

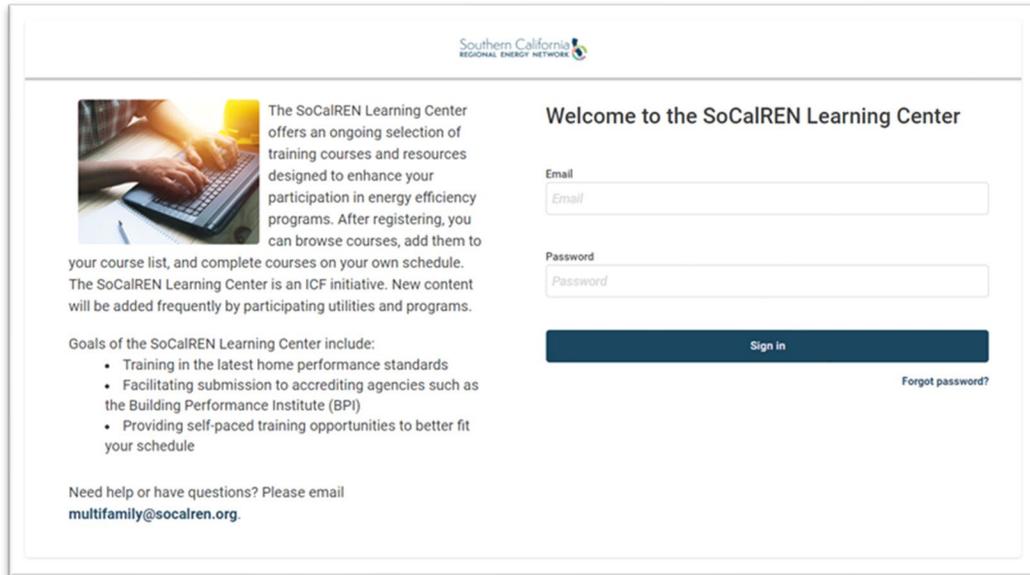
Figure 20. Trade Ally Portal Homepage



## Energy Efficiency Learning Center

In 2020, SoCalREN launched the EELC. This is a no cost, exclusive online learning platform offered to participating trade allies. Course content ranges from technical information on heating, ventilation, and air conditioning equipment to sales and marketing assistance. Trade allies can take courses at their own pace and earn continuing education credits (CEUs) for existing certifications such as BPI and North American Technician Excellence (NATE). By offering this online learning platform, our trade allies can build their technical and business skills without having to spend additional funds, which can instead be used to promote their business.

Figure 21. Learning Center Home Page



## Website Improvements

The SoCalREN website was updated in 2020 and gave contractors more visibility by listing each participating contractor in the Program. Once a participating contractor completes eligibility requirements and training as required to enroll, they are listed on the site and given access to contractor resources. These resources include access to downloadable, co-branded materials that can only be accessed with a secure login. Additionally, if contractors are interested in providing printed materials to their customers, a new online form is available to easily order the collateral.

## Virtual Audits and Inspections

In compliance with COVID-19 guidance from the Centers for Disease Control and Occupational Safety and Health Administration, and state and local guidance, SoCalREN quickly implemented protocols to ensure that customers and contractors could participate in the Program safely. Beginning in June 2020, the Program offered virtual audits and inspections as the default pathway to participation. Virtual pre-construction and post-construction inspection processes were often more time consuming, but SoCalREN Program staff overcame the various technological, operations, and safety hurdles by implementing protocols:

- New process and intake form for on-site maintenance staff or managers to perform inspections and audits in lieu of program staff or contractors.

- Virtual walkthrough over mobile video conferencing with remote guidance by knowledgeable engineering staff.
- Prep calls to ensure smooth execution.
- Flexible sampling rate requirements.

After Stay-at-Home orders were relaxed later in 2020, in-person audits and inspections were available upon request, with careful consideration of COVID-19 safety compliance:

- Detailed requirements for safe inspection and installation, including, but not limited to, physical distancing, signage, personal protective equipment (PPE), jobsite perimeter barriers, choke point and high-risk area identification, handwashing, disinfection protocols, and instructions for staff who have travelled, are sick, or were exposed to COVID-19 to stay home.
- Signage and clear communication of expectations to contractors, property staff, and tenants.
- Flexible scheduling to complete retrofit work at times accommodating safety needs.
- Avoiding occupied tenant area inspections and opting to inspect vacant units, exterior, and common areas.

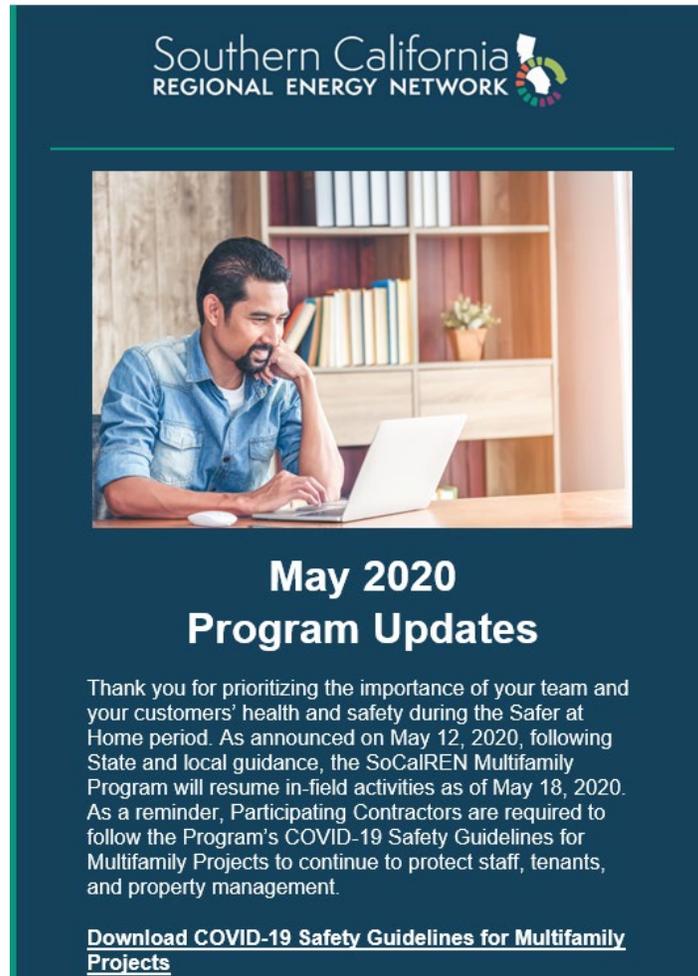
### **Self-Install**

With higher anticipated tenant utility costs due to tenants spending more time at home, SoCalREN sought to accommodate tenant and property self-install options so that customers could realize utility bill savings while protecting their health and safety. SoCalREN provided tenant self-install kits for in-unit lighting upgrades for properties that requested them. Some properties were also wary of contractor entry even in common areas, and the Program provided technical guidance to help property maintenance staff successfully implement in-house installation.

### **Newsletters and E-Blasts**

SoCalREN provided prompt and frequent updates to contractors and customers via monthly and quarterly newsletters throughout 2020. In addition to individual communication, these newsletters ensured all participants understood the Program modifications and offerings implemented in response to changes in state and local COVID-19 safety regulations. Figure 22 shows an example of the May 2020 newsletter our Program participants received when work was permitted in the region.

Figure 22. Trade Ally Newsletter



## Program Optimization/2021 Outlook

### 2021 Virtual Contractor Kick-Off

In January 2021, a virtual Contractor Kick-Off event was held to discuss new Program changes and thank contractors for all their hard work in 2020 during an exceptionally challenging year. On top of a free lunch provided by the Program, contractors were gifted a “swag bag” of SoCalREN-branded items (Figure 23), and four annual awards were handed out:

- **Gold kWh Savings:** Given to the contractor with the highest total kWh savings on projects throughout the year.

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- **Top Comprehensive Common Area Project:** Highest kWh savings earned for a Comprehensive Common Area project.
- **Contractor of the Year:** Evaluated by overall excellence, consistency, timing start to finish, lowest cancellation rate, and projected timeline hits.
- **Outstanding Contractor:** Based on fewest project processing errors and fewest on-site corrections.

**Figure 23. 2021 Contractor Kickoff Promotional Items**



### Continued COVID-19 Impacts

When the second round of Stay-at-Home orders was implemented in November and December of 2020, many projects scheduled to complete installation at the end of the year were forced to pause construction until the restrictions were lifted in 2021. Project timelines were already prolonged in 2020 due to the various challenges already discussed. SoCalREN granted flexibility to all affected projects, offering phased installation so that cashflow constrained properties and contractors could receive payment for the completed portion of their original scope of work without delay due to the coronavirus. These projects completed the remaining construction during Q1 of 2021.

As of March 2021, California is in Phase 1B of its COVID-19 Vaccination Plan, with 14.9 percent of its population fully vaccinated. All Californians over the age of 16 should be eligible to receive the vaccine

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by April 15, 2021, and Southern California counties are inching toward reopening plans. However, uncertainties remain with vaccine supply shortages, the spread of COVID-19 variants, and other risks. SoCalREN will continue to apply lessons learned in 2020 and adapt to the rapid changes in the energy and economic landscape to best serve SoCalREN's residents.

In 2021, we will implement the Kits for Kids Program, an alternative delivery strategy created in 2020. SoCalREN Kits for Kids provides energy-saving measures to families within the service area who have 4th grade students attending schools. A set of measures will be offered at no cost to participating students and their families. These no-cost measures will provide realized energy savings for each household. In addition to the energy and cost savings achieved by the student, Kits for Kids will provide educators with a classroom grant. Kits for Kids will generate energy savings and provide relief to families in need now, and will educate future household decision-makers about prioritizing EE in the future. Kits for Kids provides a model wherein families are provided with a home-based educational activity (Energy Efficiency Scavenger Hunt). The activity is designed to help the student make connections between concepts learned through 4th grade science and how the members of their household use energy at home, in a fun, hands-on fashion.

COVID-19 has had severe impacts on the SoCalREN portfolio and Energy Efficiency Sector. While there is reason to believe recovery is on the horizon, it is still too early to make a concrete assessment of Program performance in 2021. Nonetheless, SoCalREN will strive to safeguard public health while protecting green jobs and preventing long-term economic fallout in the EE industry.

### **ReEnergizing Communities Podcast**

Launched at the end of Q1, SoCalREN introduced its first-ever podcast, *ReEnergizing Communities*. The podcast will give leaders in sustainability who are making a difference across Southern California a platform to discuss their important work. Whether showing property managers and local governments better choices for energy use or highlighting opportunities for individuals in disadvantaged communities to pursue careers in energy and water efficiency, this podcast aims to connect listeners to conversations that can help influence change at work, at home, and in their communities.

Though the podcast launched in 2021, the beginning efforts on the pilot episode began in Q4 of 2020. Collateral pieces, such as the *ReEnergizing Communities* name and the podcast art, were developed. The initial interview for the pilot episode was also conducted in Q4 as well. The pilot episode of *ReEnergizing Communities* is focused on the topic of *energy resiliency*. Energy resiliency is defined as an entity's ability to withstand or recover quickly from disruptions in available and affordable energy resources. To help discuss this important topic, we invited two representatives from the City of Palmdale, Ben Lucha and Kathy Wells, as well as Lujana Medina from Los Angeles County and Chris Ford from The Energy Coalition, to help discuss energy resiliency and how SoCalREN can help public agencies and consumers alike.

Figure 24. Podcast Logo



## Public Sector Programs

### Overview of Sector Performance

The SoCalREN Public Sector Programs empower public agencies to lead their communities toward a safe, secure, resilient, affordable, and sustainable clean energy future. SoCalREN takes a comprehensive approach to helping agencies complete EE projects. From energy benchmarking to project closeout, the Programs offer a suite of services to help identify energy-saving measures and work alongside agency staff—all at no cost to the agency. This portfolio of targeted and sector-specific solutions delivers a comprehensive yet customizable approach for a wide range of public facilities and assets. These include agency sites such as schools, libraries, streetlights, water and wastewater facilities, parks and recreational facilities, data centers, police departments, city halls, and community centers. SoCalREN works collaboratively with engineering firms, contractors, regional partners, SCE, and SoCalGas to ensure seamless and streamlined “one-stop” services to customers.

Customized technical support services help participating public agencies implement thorough, yet cost effective, energy upgrades and energy management practices. SoCalREN builds the capacity of the public sector to drive communities toward a sustainable energy future by supporting public agency EE projects, offering educational opportunities, and creating connections among agencies for peer-to-peer learning.

The SoCalREN EE PDP was launched by Los Angeles County in September 2013. In 2019, SoCalREN designed and launched three new Programs: Public Agency Normalized Metered Energy Consumption (NMEC) Program (publicly known as the Metered Savings Program), Distributed Energy Resources (DER) for DACs Project Delivery Program (publicly known as Pathway to Zero), and SoCalREN's Revolving Loan Fund (publicly known as Revolving Savings Fund). 2020 was the first full year of program implementation for the three Programs. Despite the challenges presented by COVID-19, these Programs, along with the EE PDP, delivered significant benefits to the communities served.

Collectively, SoCalREN's network of agencies achieved 10,115,467 first-year annual kWh (gross), 1,026 kW, and 2,402 therm savings in the 2020 program year.

The Public Sector Programs' 2020 annual satisfaction survey demonstrated that agencies find significant value in SoCalREN's services. More than 93 percent of survey respondents<sup>10</sup> agreed that SoCalREN is helping their agency fill gaps in efforts to identify, plan, procure, and install EE projects. Annual customer satisfaction ratings (Figure 25) are consistently 90 percent or higher and, in 2020,

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<sup>10</sup>The survey received 47 responses representing 30 percent of enrolled agencies.

survey respondents reported a 92 percent satisfaction rate with services.<sup>11</sup> Maintaining high customer satisfaction is a signature of the SoCalREN Public Sector Programs.

**Figure 25. Program Growth and Agency Satisfaction Survey Results**



The SoCalREN Public Sector Programs delivered significant value to the public sector in 2020. Program performance is based on energy and non-energy related values—such as building public agency capacity and expertise, supporting job creation, and reducing GHG emissions—and is tied to the Programs’ Implementation Plans, annual targets adopted in the SoCalREN’s Annual Advice Letter (ABAL), and performance targets determined by the County. Efforts to grow the Public Sector Programs, and expand their reach, were ramped up in 2020 to ensure delivery of the Program’s services across the entire territory. The value added to the public sector by these efforts is illustrated throughout this section of the Annual Report.

To address the new challenges posed by COVID-19, and ensure public agencies continue to lead by example, SoCalREN expanded and enhanced its Program offerings in 2020. SoCalREN initiated a new web series called *Conversations with SoCalREN*. Through discussions with the Program’s Regional Partners (for more details on Regional Partnerships, see *2020 Sector Strategies* below), a need for facility staff training was identified. Based on the feedback about regional needs, SoCalREN designed and delivered a Capacity Building Sub-Program. The Public Sector also revisited and enhanced an ESCO coordination strategy to drive more comprehensive projects at no up-front cost. SoCalREN also focused on tailoring support to diverse and distinct community needs by expanding regional

<sup>11</sup>Southern California Regional Energy Network 2020 Public Agency Satisfaction Survey.

partnerships. Lastly, SoCalREN developed a Community Equity Action Plan to ensure that existing and future program services provide tailored support to underserved communities, who need it most. These strategies and sector modifications are discussed in detail in this report.

As the increased pressure for cost-effective EE savings continues, SoCalREN takes a nimble approach to program design, recognizing that programs evolve as needs and conditions change. Regional Energy Networks (RENs) fill the gaps and provide services not offered by IOUs, with an emphasis on HTR communities and DACs. In 2020, 57 percent of Program participants served DACs and 25 percent of public agencies served rural communities.<sup>12</sup> The Public Sector Programs also succeeded in identifying and delivering EE projects to underserved communities as follows:

- 31 percent of installed<sup>13</sup> projects were located at facilities in zip codes classified as DACs.
- 1 project was installed and 4 were developed<sup>14</sup> in Title I schools.
- 49 projects were installed and 26 were developed in low-income communities.<sup>15</sup>

To further enhance and amplify program offerings and services for DACs and HTR communities, SoCalREN leveraged non-ratepayer (non-California Public Utilities Commission or California Public Utilities Commission) funds. In 2020, SoCalREN utilized funds from the CEC to design and implement a companion Sub-Program to Pathway to Zero called *Benchmarking Call to Action*, and this is described in further detail below.

## Sector Modifications

### New Program Offerings

SoCalREN added two new Sub-Programs in 2020: a Capacity Building Sub-Program and the Benchmarking Call to Action Sub-Program.

#### Capacity Building Sub-Program

SoCalREN designed and delivered a Capacity Building Sub-Program to provide technical training to agency staff to meet the unique maintenance and operation needs created by COVID-19. Through the three-day training series, agencies learned to analyze energy and money saving opportunities such as modified schedules and operations and learned to maximize energy savings and performance through energy assessments, screening audits, and selection of proper equipment. This training series offered

<sup>12</sup>Rural is defined based on rural and highly rural census tracts classified by Rural-Urban Commuting Areas (RUCA) codes developed by the United States Department of Agriculture

<sup>13</sup>Installed refers to Installation Report submitted

<sup>14</sup>Developed refers to incentive submitted

<sup>15</sup>Zip codes containing low-income census tracts defined by AB 1550 with median household incomes at or below 80% of the statewide median income or with median household incomes at or below the threshold designated as low-income by HCD's state income limits ([https://ww2.arb.ca.gov/sites/default/files/classic/cc/capandtrade/auctionproceeds/kml/ab1550\\_maps\\_documentation.pdf](https://ww2.arb.ca.gov/sites/default/files/classic/cc/capandtrade/auctionproceeds/kml/ab1550_maps_documentation.pdf))

support during a time when agencies must rely more on internal staff and are expected to do more with fewer resources.

### **Benchmarking Call to Action Sub-Program**

Los Angeles County is always seeking external funds to support SoCalREN’s mission. Public agencies provided feedback that they were looking for more support with benchmarking and DER technical services to meet local and statewide energy and climate goals. The Benchmarking Call to Action (BMCTA) Sub-Program,<sup>16</sup> funded by the CEC, was launched in response to this agency feedback and includes additional technical services, such as enhanced on-site benchmarking, DER audits, and other technical support to move DER projects forward. The Program is offered as a Sub-Program to Pathway to Zero and is exclusively offered to enrolled DACs pursuing EE projects.

SoCalREN’s customer-centric approach, paired with ongoing program modifications for continuous improvement, is key to achieving meaningful results and satisfaction across all programs.

## **Energy Efficiency Project Delivery Program**

### **EE PDP Description**

The EE PDP, SoCalREN’s flagship Program, provides public agencies with comprehensive, customized EE services to help them overcome sector-specific barriers inhibiting them from completing EE projects. The Program provides objective, third-party expertise to help agencies implement the best measures to maximize energy cost savings and other benefits to their communities.

### **EE PDP Services**

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

- Project management from project identification through construction completion.
- Energy consumption benchmarking.
- Technical support, including identification of energy efficiency improvement measures, facility energy audits, and energy efficiency measure performance specifications.
- Analysis of financing options, financial advisory services, and assistance with rebate and incentive applications.
- Proposal and construction support, including procurement guidance, staff approval support, construction management support, and third-party objective review.

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<sup>16</sup>Contract term is 2020-21

SoCalREN also provides public agencies with tools, resources, webinars, and more to enable public agencies to increase energy expertise, build agency buy-in, 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 that includes:
  - Seven Program guidebooks with topics ranging from benchmarking to procurement to provide step by step guidance from “strategies to build project support” to “working with ESCOs.”
  - Access to and development of case studies to demonstrate agency leadership and promote EE across the region.
  - PDFs of presentation slides delivered and webinar recordings.
- Support with agency and staff level recognition of leadership in energy efficiency, such as incentive check presentations, trade group award nominations, and social media content development.

### EE PDP Objectives

- **Fill market gaps** in the public sector and provide public agencies with an integrated, objective, and comprehensive energy efficiency solution for their facilities and other infrastructure.
- Increase the percentage of public agencies, particularly those serving DACs and HDR communities, which engage their communities in energy action to reduce overall community energy consumption.
- Increase the ability of public agencies to meet local, regional, and state energy targets, climate targets, and policy goals.
- **Increase the number of participating public agencies** in the SoCalREN Public Sector Programs, with an emphasis on underserved communities.
- **Position public agencies to lead** community awareness campaigns, engage stakeholders, build public awareness of local, regional, and state efforts, and drive participation in utility and SoCalREN resource programs.
- Deliver real and persistent energy savings through resource program pathways.
- Expand the implementation of cost-effective energy efficiency projects.

## EE PDP Performance

The EE PDP’s 2020 performance is highlighted in Table 11.

**Table 11. EE PDP 2020 Performance**

Energy Efficiency Project Implementation	
Number of Installed Projects (Installation Report submitted in 2020)	55
Percent of Projects Installed on Facilities that Serve DACs <sup>17</sup>	23%

Table 12 shows the percentage of 2020 installed projects that received specific Program services.

**Table 12. 2020 Installed Projects Leveraging EE PDP Services**

Percent of Installed 2020 Projects (by Installation Reports Submitted)	
EE PDP Services <sup>18</sup>	Percent of Projects Utilizing Service
Project Management	100%
Audit/Engineering Calculations	85%
Objective Technical Review	75%
Utility Incentive Application	94%
Financial Analysis	85%
Financial Services	46%
Procurement Support	48%
Construction Phase Support	15%

Projects are identified using a variety of strategies. One of those strategies is a Comparative Energy Analysis (CEA) that evaluates agency-wide energy use across buildings and infrastructure, identifies the highest energy users, and provides a preliminary assessment of potential savings. In 2020, 21 CEAs were delivered to public agencies.

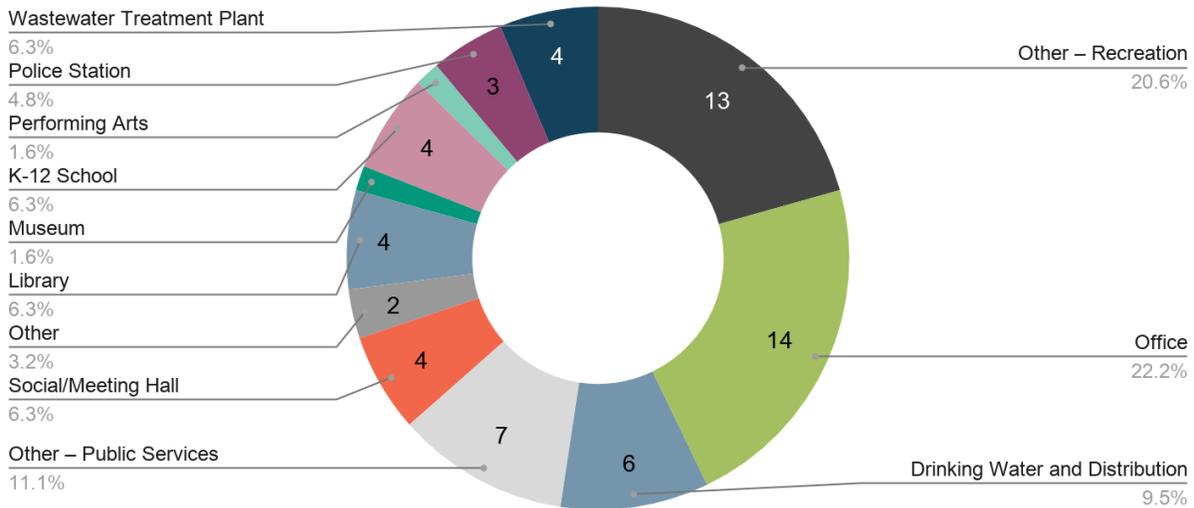
For projects delivered in 2020 and those expected to be delivered in future years, the Program performed 32 investment-grade audits. The audits assessed 29 public agency buildings and 67 non-building facilities, such as parks or water treatment plants.

<sup>17</sup> As defined by [CalEnviroScreen 3.0](#)

<sup>18</sup> See Appendix B for definitions.

**Figure 26. Breakdown of Facility Types Audited through PDP**

Non-DAC Facilities Audited by Type



SoCalREN recognizes the importance of contributing to real and persistent energy savings to help California meet its climate and energy goals. Nearly all EE PDP supported projects' energy savings are attributed to and claimed by resource programs.<sup>19</sup> The EE PDP is a non-resource program that channels projects through claimable resource program pathways to demonstrate persistent energy savings and environmental benefits. When the EE PDP launched in 2013, SoCalREN worked to develop a data exchange and tracking process that ensures SoCalREN non-resource activities match up with resource activities. REN projects are “flagged” through a monthly data reconciliation with IOU core program participation data to ensure that the IOU data submitted to the Commission is comprehensive and accurate. This data exchange and tracking process was established between SoCalREN, SCE, and SoCalGas and ensures non-resource activities explicitly align with resource activities. The data exchange is referenced in the SoCalREN, SCE, and SoCalGas 2021 Joint Cooperation Memo.<sup>20</sup>

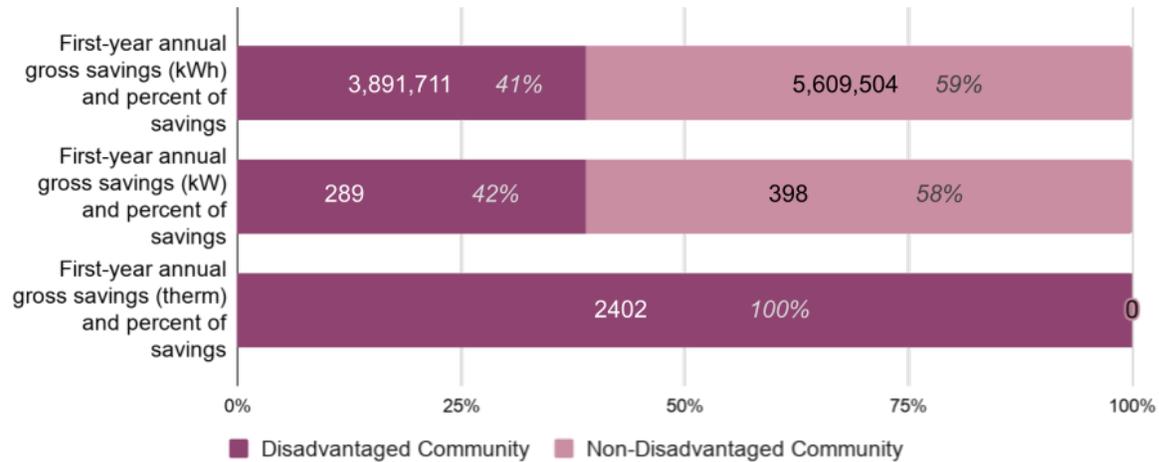
Table 13 reflects savings channeled through Commission resource programs.

<sup>19</sup>In some cases, no viable resource pathway is available to agencies. SoCalREN services are offered to agencies on a case by case basis when this occurs.

<sup>20</sup>[SoCalREN, SCE, and SoCalGas' 2021 Joint Cooperation Memorandum.](#)

**Table 13. 2020 Installed Savings<sup>21</sup>**

Savings Installed in 2020 by Installation Report Submitted



These energy savings will result in a 2,222-ton GHG emissions reduction, equivalent to taking 480 cars off the road for one year.<sup>22</sup>

**Table 14. 2020 kWh Savings by Eligible County**

kWh Savings and Projects by Eligible County: 2020 Installation Report Submitted <sup>23</sup>			
County	kWh Savings	Percent of Total kWh Savings	Number of Projects
Ventura	3,093,391	33	25
San Bernardino	2,697,223	28	4
Los Angeles	3,041,082	32	12
Riverside	374,716	4	3
Orange	242,999	3	10
Santa Barbara	51,804	1	1
<b>Total</b>	<b>9,501,215</b>	<b>100%</b>	<b>55</b>

<sup>21</sup> Not all installation reports submitted in 2020 are claimed by resource programs in 2020. Metrics also include 2020 installed projects that are channeled through the Metered Savings Program, which does not require Installation Reports.

<sup>22</sup> Assumes 534 lbs. CO<sub>2</sub>e/MWh (SCE Corporate Sustainability Report 2019) and 11.91 lbs./therm (AB32 Climate Change Scoping Plan), and 0.216 cars/metric ton ([EPA GHG calculator](#))

<sup>23</sup> Includes 2020 construction complete projects that are channeled through NMEC resource programs

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Figure 27. Savings Channeled to and Claimed by IOU Resource Programs

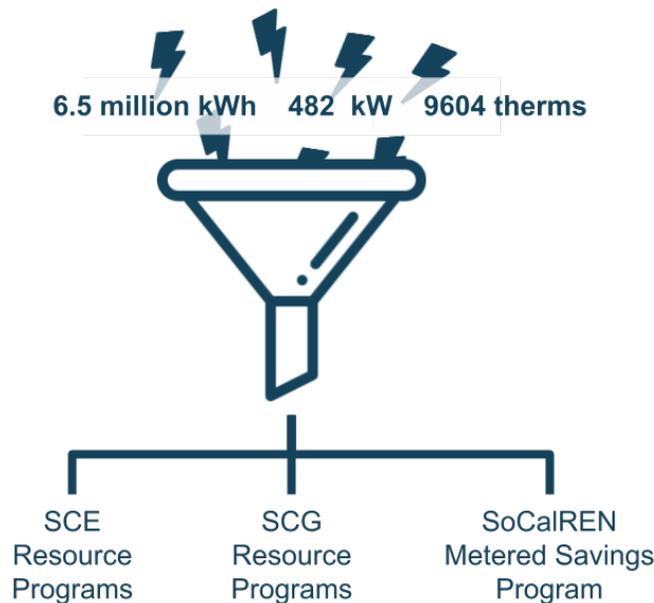


Table 15 highlights the program’s savings contribution to the IOUs’ 2020 portfolio.

Table 15. Channeled Energy Savings

Channeled Energy Savings <sup>24</sup>	
SCE Program	SoCalREN contribution to SCE’s Portfolio
Orange County Cities Energy Leader Partnership	100 % kWh
San Bernardino Association of Governments	100 % kWh
South Santa Barbara County Energy Leader Partnership	100 % kWh
Ventura County Energy Leader Partnership	72 % kWh
West Side Community Energy Leader Partnership	100 % kWh
Water Infrastructure Systems EE Program (WISE)	94 % kWh
Commercial Calculated Program	17 % kWh
Commercial Deemed Incentives Program	0 % kWh
Grandfathered Streetlights	4 % kWh

<sup>24</sup> SCE channeled energy savings are based on SCE Q3 claims data as Q4 claims were not available by the SoCalREN Annual Report submission date. Numbers are inclusive of the EE PDP and Pathway to Zero savings.

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As a non-resource program, the EE PDP channels energy savings to SCE and SoCalGas resource programs as well as the SoCalREN Metered Savings Program, which is highlighted in more detail in the *Metered Savings Program* section of this report.

Enrolled agencies receive financial analyses to evaluate the economic viability of projects, as well as application support services to obtain the necessary incentives or financing to make projects a reality. Reduced project costs and utility bill savings cuts costs for public agencies, freeing up scarce public resources for services like public safety, firefighting, and educational resources. Projects installed in 2020 provide financial savings to public agencies as shown in Table 16.

**Table 16. Financial Benefits to Public Agencies**

Financial Benefits to Public Agencies	
Annual Utility Bill Savings and Percent of Savings	\$1.4 M, 39% within DACs
Total Utility Incentives Captured	\$1.1 M, 45% within DACs
Total Utility OBF Captured	\$1.2 M, 32% within DACs
Total Non-IOU Financing (Prop 39, CEC Energy Conservation Assistance Act)	\$5 M, 14% within DACs

The Program strives to support economic development and construction jobs in the energy efficiency industry. This impact is measured by applying the typical number of jobs created by public sector investment in capital projects to the cumulative construction value of all projects completed through the Program. The 2020 gross construction costs of \$14,755,856<sup>25</sup> translate to 160 jobs supported.

In addition to supporting projects installed in PY 2020, the EE PDP developed new projects that represent a significant pipeline of future savings for 2021 and beyond. Pipeline development is essential to long-term Program success, as the average timeline from project identification to completion for public agencies participating in SoCalREN programs is approximately 24 to 48 months. Project pipeline savings are defined by the energy efficiency program application submitted values. These projected savings are shown in Table 17.

<sup>25</sup>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/>).

**Table 17. Project Pipeline Developed**

Project Pipeline Developed		
19,037,623 kWh	2,277 kW	168,056 therms

The EE PDP also supported agencies with the financing support services identified in Table 18 to drive project implementation.

**Table 18. Additional Financing Support Services**

Additional Financing Support Services	
Number of Utility Rebate/Incentive Applications Supported (based on incentive submitted date)	25
Total Rebate/Incentives Reserved (\$)	\$972,951
Total Zero-Percent Interest OBF Reserved (\$)	\$322,567

## EE PDP Modifications

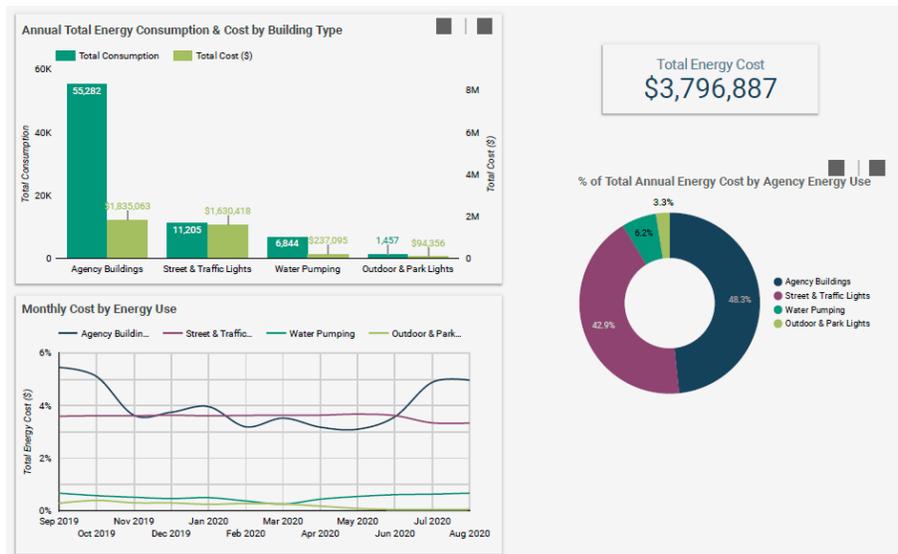
In 2020, the Program continued to streamline its systems and processes, and improve cost effectiveness while responding to the evolving needs of the market, particularly those introduced by COVID-19. There were no significant modifications to the EE PDP design. See the *Sector Modifications* section for modifications that addressed all Public Sector Programs.

## EE PDP 2020 Strategies

The following are other noteworthy 2020 strategies that built on SoCalREN’s record of successful program design. Additional information on strategies and responses to COVID-19 that applied to programs sector-wide are included in the *Sector Modifications* section.

- Continued to meet market gaps.** Coordinated with Rancho Cucamonga Municipal Utility and established a Memorandum of Understanding (MOU) with Los Angeles County that allowed the municipal utility to provide funding (from electricity customers) with complementary Commission funding (from SoCalGas ratepayers) in order to enable the agency to take advantage of SoCalREN’s comprehensive service offerings.
- Developed strategies to identify and capture savings including:**
  - Streamlined and enhanced the CEA to identify project opportunities and help agencies monitor facility energy use over time. The CEA is now delivered through an interactive online portal delivering more robust and complete information to public agencies.

Figure 28. CEA Building Summary Page



- Tracked and **disseminated information on proven emerging technology applications** with the potential for energy savings through the internal Technology Application for Program Savings (TAPS), an initiative that supports implementation of industry best practices for high performing projects.
  - Developed and piloted a new **Building Targeting Report** to facilitate project and measure identification, and deliver an in-depth analysis of time of use for energy across agency facilities.
3. **Developed tools to streamline services and reduce costs** as part of an ongoing effort to improve Program efficiency, and incorporate lessons from on-the-ground experience. Examples of continuous improvement and incorporating lessons learned for cost effective Program implementation include:
- An enhanced initial measures list (IML) report provided after audit and before detailed analysis to **align agencies' plans and expectations**. The IML discussion with agencies dictates the services necessary to complete the project, and helps the Program manage where resources are invested.
  - An improved financial analysis that includes **tariff-based project cash flows and additional financing mechanisms**. These and other enhancements to the Project Proposal and financing calculator help communicate the business case for project implementation, and demonstrate financing options available to public agencies.
4. **Improved IOU Program Coordination.** SoCalREN coordinates with SCE and SoCalGas through monthly coordination meetings to share program and policy updates, and to resolve any issues or challenges. SoCalREN also hosts several additional bi-weekly and monthly meetings with SCE to

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discuss projects and challenges to ensure successful coordination and delivery of projects to mutual customers. In 2020, SoCalREN improved strategies to streamline delivery of energy program resources to customers, including:

- **An IML pre-coordination call** offered to IOUs to review site visit findings and address any project questions or concerns before project materials are presented to the customer.
- **A refined Agency Services Plan and coordinated approach with the IOUs** to present Program pathways to agencies. These plans outline energy efficiency measures identified, financial metrics, and Program services available to agencies. They educate the customer on the Program options available to them so they can make an unbiased and informed decision.
- A newly developed **customized project reporting template to deliver to SCE** on a monthly basis to share projects that are active in their databases. This provides SCE additional visibility into the current project pipeline and allows discussion of any outstanding issues impeding project approval.

### EE PDP Optimization/2021 Outlook

The EE PDP operates in a mode of continuous improvement, and integrates feedback on an ongoing basis to refine services. Program improvements aim to enable agencies to overcome barriers to project implementation, improve cost effectiveness, and increase program penetration throughout the eligible service territory. Feedback from public agencies is collected during a recurring annual satisfaction survey, during the closeout of individual projects, and intermittently through focus groups in order to guide future Program enhancements. 2021 Program activities and optimization strategies include:

- Continue to expand regional reach and contract with additional regional partners to better serve agencies in all regions of the territory.
- In coordination with regional partners, initiate pilot offerings to meet the unique needs of each region. Regional partners are uniquely positioned to support activities including:
  - Supporting public agencies with the development of longer term, strategic energy action planning to create (1) a pipeline of future energy projects and (2) a long-term vision and plan for the agency.
  - Initiating “Lunch-n-Learns” in person or online to educate interdepartmental staff about the benefits of energy efficiency as it is imperative that public agencies understand the loading order and importance of energy efficiency before completing other energy actions.
  - Facilitating education and training opportunities to create lasting impacts.
- Improve communication about the PDP’s services and project opportunities throughout the project lifecycle including:

- Developing slide decks for the following deliverables: Initial Measures List, Agency Services Plan, Progress Reports, and Project Proposal. As the program shifts to more remote engagements, reviewing lengthy documents will be enhanced by clear and concise presentations with helpful corresponding visuals.
- Integrate general information about SoCalREN's entire portfolio of programs to ensure that agencies understand all of the available resources they can access.
- Enhance the Project Proposal deliverable to speak more to each agency's climate and energy goals. Demonstrate how projects and savings will support agencies with the achievement of their short- and long-term goals.
- Facilitate comprehensive, large-scale, and no upfront cost energy projects by coordinating with and introducing ESCOs during project development.
- Create targeted marketing and outreach strategies to engage additional school districts, and support the development of projects to be funded by AB 841.
- Leverage and market state and federal energy programs and resources and provide public agencies with the best available information on the fast-changing industry to support project development decision making.

## Pathway to Zero Public Agency Project Delivery Program

### Pathway to Zero Program Description

Pathway to Zero (the publicly facing name for the DER DAC Project Delivery Program) was created to maximize energy efficiency opportunities while driving the integration of DERs in the public sector. The Program supports public agencies on a path toward zero net energy (ZNE), which, as per SoCalREN's adopted definition, means that the annual energy consumed on site and the annual energy losses from generation, transmission, and distribution are offset by the annual production of on-site renewable energy.

Pathway to Zero provides a comprehensive evaluation of energy opportunities for facilities in DACs,<sup>26</sup> including energy efficiency measures and a customized high-level review of DER options. This Program gives agencies the information needed to get started choosing the DERs that are right for their facilities.

Starting in 2020, SoCalREN enhanced the Pathway to Zero Program with non-ratepayer funding to expand offerings and services for DACs and HTR communities. SoCalREN leveraged funds from the CEC to design and implement a companion Sub-Program to Pathway to Zero called Benchmarking Call to Action. The Sub-Program was made available to enrolled DACs in 2020, and provides enhanced benchmarking support and critical technical assistance to implement DERs. The BMCTA Sub-Program is described in further detail under *External Funding Leveraged by Public Sector* below.

<sup>26</sup>As defined by [CalEnviroScreen 3.0](#)

## Pathway to Zero Program Services

All program services offered through the SoCalREN EE PDP are also available through the Pathway to Zero Program. Additional services uniquely offered to DACs include:

- Conducting education and outreach regarding DER strategies on topics such as the integration of distributed generation, energy storage, demand response, energy management, and water efficiency optimization for public agencies.
- Identifying the technical expertise required for each of the DER areas.
- Leveraging an enhanced CEA to identify and prioritize project opportunities (additional detail is provided in the *Pathway to Zero Program Modifications* section below).
- Building public agency expertise networks through training and development workshops that cover best practices protocols across all DER energy service areas and are offered to current and potential SoCalREN enrolled public agencies.
- BMCTA Sub-Program services.

## Pathway to Zero Program Objectives

- Increase the percentage of public agencies serving DACs engaging in EE and DER energy actions and strategies, thereby reducing overall community energy and peak demand energy consumption.
- 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 DACs.
- Enroll agencies and encourage them to engage their constituents about EE and DER programs and strategies.

## Pathway to Zero Program Performance

In 2020, Pathway to Zero delivered 25 comprehensive Pathway to Zero reports and developed 6 new EE projects. Also, there are 13 additional pipeline Pathway to Zero reports identified to be delivered during 2021. Figure 29 provides a summary of program performance. Additional benefits achieved through BMCTA support are detailed under *External Funding Leveraged by Public Sector* below.

Figure 29. Pathway to Zero Program Performance



Table 19. DER and Sustainability Strategies Identified and Shared

DER and Sustainability Strategy Information and Resources Shared	
DER and Sustainability Strategy	Number of Instances Shared in Pathway to Zero Reports
Electric Vehicle Charging Infrastructure	22
Solar and Battery Storage	19
Demand Response	13
Permanent Load Shifting	13
Green Rates	11
Water Efficiency	10
Solar Water Heating	8

**Table 20. Pathway to Zero 2020 Performance**

Energy Efficiency Project Implementation	
Number of Installed Projects (Installation Report submitted in 2020)	4

Table 21 shows the percentage of 2020 installed projects that received specific program services.

**Table 21. 2020 Installed Projects and Program Services Utilized**

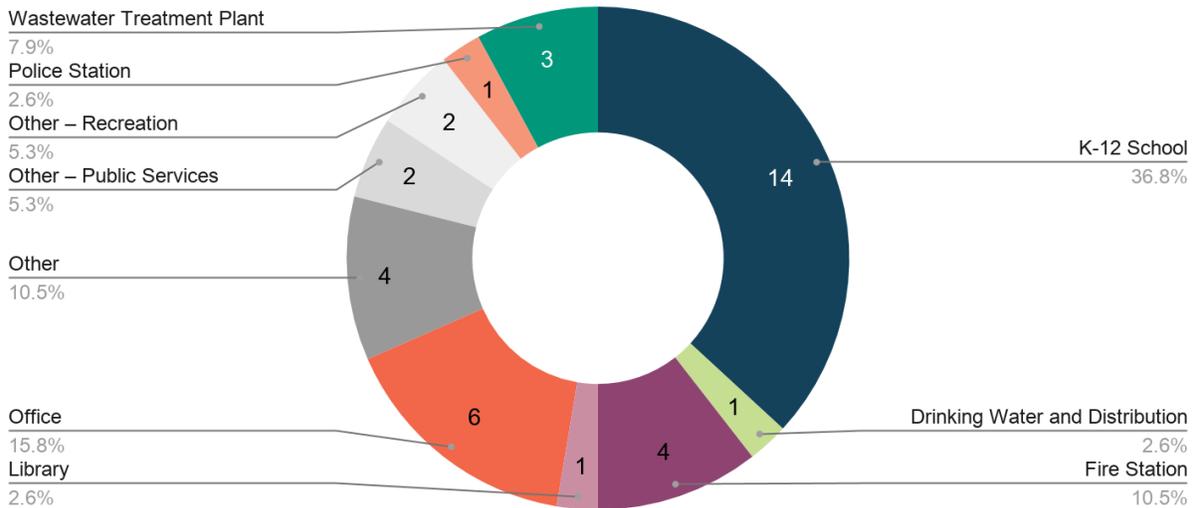
Number of Installed 2020 Projects (by Installation Reports Submitted)	
Pathway to Zero Services <sup>27</sup>	Percent of Projects Utilizing Service
Project Management	100%
Audit/engineering Calculations	100%
Objective Technical Review	50%
Utility Incentive Application	100%
Financial Analysis	75%
Financial Services	75%
Procurement Support	75%
Construction Phase Support	0%

For projects delivered in 2020 and those expected to be delivered in future years, the program performed 14 investment-grade audits. The audits assessed 32 public agency facilities and 6 non-building facilities, such as parks or water treatment plants.

<sup>27</sup>See Appendix B for definitions.

**Figure 30. Breakdown of Facility Types Audited through Pathway to Zero**

DAC Facilities Audited by Type



Similar to the EE PDP, nearly all supported energy efficiency projects’ energy savings are attributed to and claimed by resource programs because Pathway to Zero is a non-resource program that channels projects through claimable resource program pathways to demonstrate persistent energy savings and environmental benefits.

Table 22 identifies the savings channeled through Commission resource programs.

**Table 22. 2020 Installed Savings**

Savings Channeled: 2020 Installation Report Submitted <sup>28</sup>	
First-Year Annual Gross Savings (kWh) and Percent of Savings within DACs	562,497 kWh
First-Year Annual Gross Savings (kW) and Percent of Savings within DACs	0 kW
First-Year Annual Gross Savings (therm) and Percent of Savings within DACs	0 therms

Of these kWh savings, 529,773 were channeled into IOU resource programs. These energy savings will result in a 136-ton GHG emissions reduction, equivalent to taking 29 cars off the road for one year.

Table 23 lists the financial savings to public agencies from projects installed in 2020.

<sup>28</sup>Not all installation reports submitted in 2020 are claimed by resource programs in 2020. Metrics also include 2020 installed projects that are channeled through the Metered Savings Program, which does not require Installation Reports.

*The Southern California Regional Energy Network is administered by the County of Los Angeles and funded by California utility ratepayers under the auspices of the California Public Utilities Commission.*

**Table 23. Financial Benefits to Public Agencies**

Financial Benefits to DAC Public Agencies	
Annual Utility Bill Savings	\$84,375
Total Utility Incentives Captured	\$158,950
Total Utility OBF Captured	\$388,235

Like the EE PDP, the Pathway to Zero Program strives to support economic development and construction jobs. The 2020 gross construction cost of \$1M<sup>29</sup> translates to 11 jobs supported.

In addition to supporting projects installed in PY 2020, the Program developed projects that represent a significant pipeline of savings for 2021 and beyond. Pipeline development is essential to long-term Program success, and once identified, a project may take up to four years to complete. Project pipeline savings are defined by the EE Program application submitted values. The projected savings are presented in Table 24.

**Table 24. Project Pipeline**

Project Pipeline		
2,274,487 kWh	753 kW	0 therms

SoCalREN’s Pathway to Zero Program also supported agencies with financing support services to drive project implementation (Table 25).

**Table 25. Additional Financing Support Services**

Additional Financing Support Services	
Number of Utility Rebate/Incentive Applications Supported (based on Incentive Submitted Date)	7
Total Rebate/Incentives Reserved	\$232,271

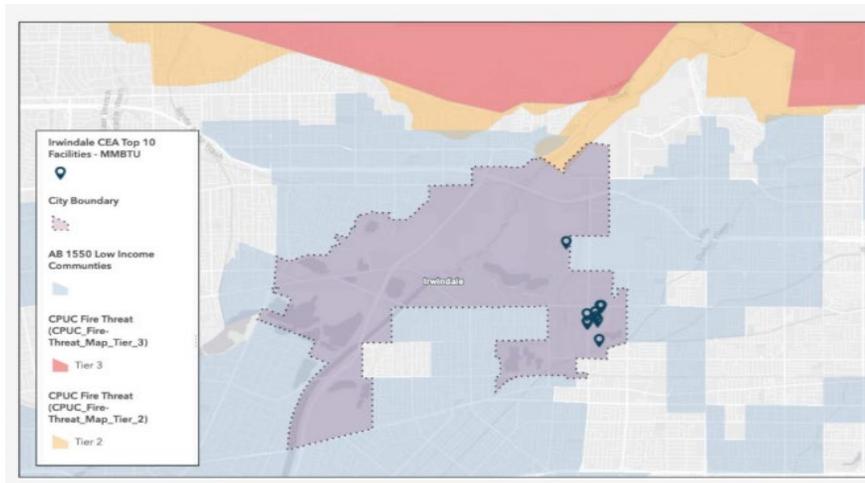
## Pathway to Zero Program Modifications

An enhanced CEA and Project Proposal were developed to feature the comprehensive sustainability solutions provided to public agencies through energy efficiency and DER strategies. The CEA now includes an equity indicator map (Figure 31) that highlights agency facility consumption and agency-

<sup>29</sup>Construction conversion to jobs = Gross Project Cost/\$92,000.

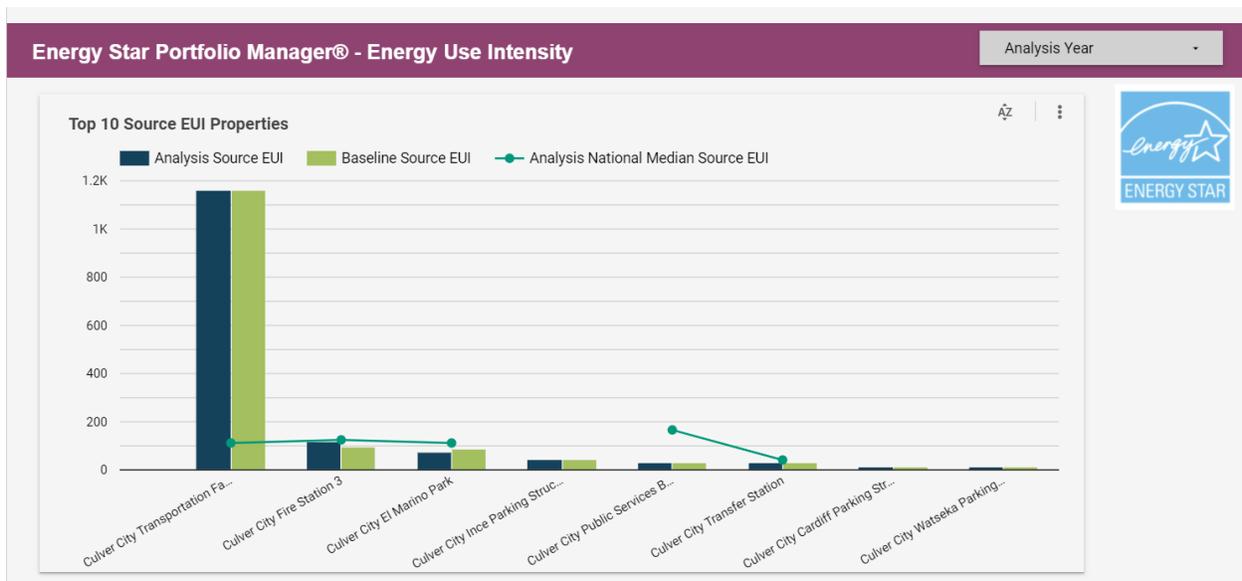
specific issues such as fire risk or DAC areas to consider both energy and non-energy related factors and priorities when developing new projects.

**Figure 31. Equity Indicator Map**



The CEA also includes an ENERGY STAR Portfolio Manager – Energy Use Intensity chart for the agency portfolio, as depicted in Figure 32.

**Figure 32. Sample Energy Use Intensity Chart**



The Pathway to Zero Project Proposal outlines a project's key financial metrics, energy efficiency measures, and incentives and financing options, and provides a cash flow analysis. In order to better

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speak to public agencies serving DACs and to highlight the DER and sustainability strategy metrics, SoCalREN enhanced the Project Proposal template. The deliverable now includes:

- Evaluation of facility progress toward ZNE;<sup>30</sup>
- Energy cost savings from EE and DER measures, and
- Resilience or equity related metrics to demonstrate the non-financial benefits of DERs.

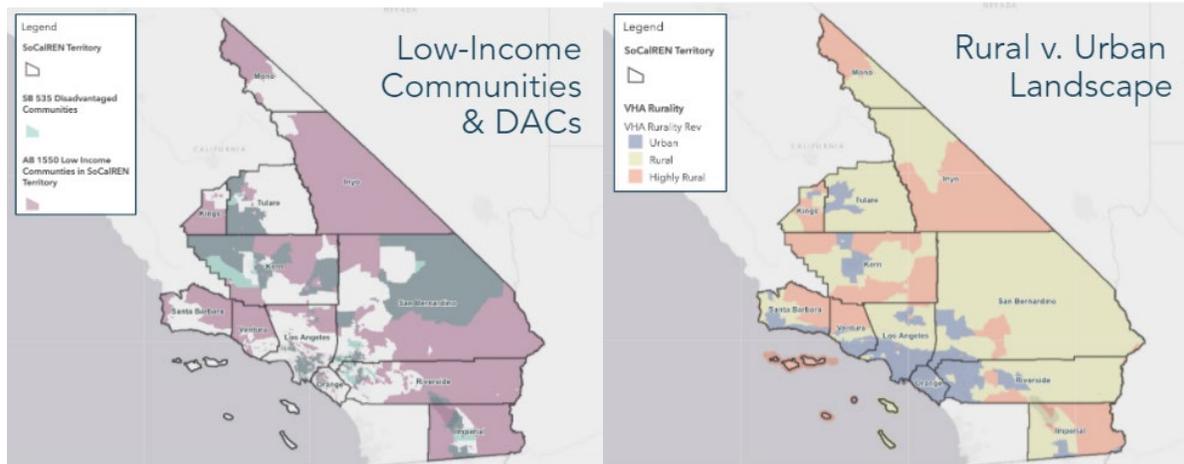
### Pathway to Zero 2020 Strategies

All strategies outlined in the EE PDP section were co-developed and implemented by the Pathway to Zero Program. See *EE PDP 2020 Strategies* above for reference. Strategies unique to Pathway to Zero and delivered specifically to DACs include:

- **Delivered DAC agency facilities with Pathway to Zero reports.** These reports provide a high-level review for a number of DER and sustainability strategies such as photovoltaics and battery storage, demand response, electric vehicle charging, and water efficiency, meant to provide initial guidance for the facilities. Information on rebates and incentives available for the DER or sustainability strategy are also included in the report.
- **Leveraged external funds** from the CEC to design and implement the BMCTA Sub-Program.
- **Developed a Community Equity Action Plan** to compile regional analysis for underserved communities (including disadvantaged, rural, and low-income), and to identify Program strategies to address barriers for agencies serving these communities. Strategies identified will be developed and implemented in 2021. The primary barriers identified were:
  - Staff constraints and lack of in-house capacity for developing energy projects;
  - Lack of access to capital and project financing resources;
  - Risk aversion due to resource scarcity (i.e., basic community services a competing priority);
  - Lack of representation and peer examples within energy programs; and
  - Lack of access to Pathway to Zero services due to a limiting DAC definition.

<sup>30</sup> This level of detail is supported by the BMCTA Sub-Program offerings, specifically a DER audit.

**Figure 33. Equity Action Plan Regional Analysis through Geographic Information System (GIS) Tool**



### Pathway to Zero Program Optimization/2021 Outlook

The Pathway to Zero Program will continue to address the unique needs of underserved communities within the public sector and customize solutions at the public agency and project level. The Program integrates feedback on an ongoing basis to refine services, enable agencies to overcome barriers to project implementation, improve cost-effectiveness, and increase Program penetration throughout the eligible service territory. Feedback from public agencies is collected during the annual satisfaction survey, closeout of individual projects, as well as intermittently through focus groups, and is integrated in the below optimization strategies:

- Reference all strategies previously developed from the EE PDP as they will also be available through Pathway to Zero.
- Follow recommended and vetted strategies from the Community Equity Action Plan developed in 2020, including:
  - Pilot energy action plans and resilience planning through SoCalREN regional partnerships;
  - **Expand capacity building training** series to provide technical trainings to agency staff and continue to meet the unique maintenance and operations needs created by COVID-19;
  - **Offer internal agency workshops** to provide EE and DER education across agency departments and decision-makers in the planning, financing, procurement, and implementation of projects;
  - **Develop peer-to-peer mentorship and networking opportunities** to facilitate best practices sharing among agencies serving disadvantaged and underserved communities;

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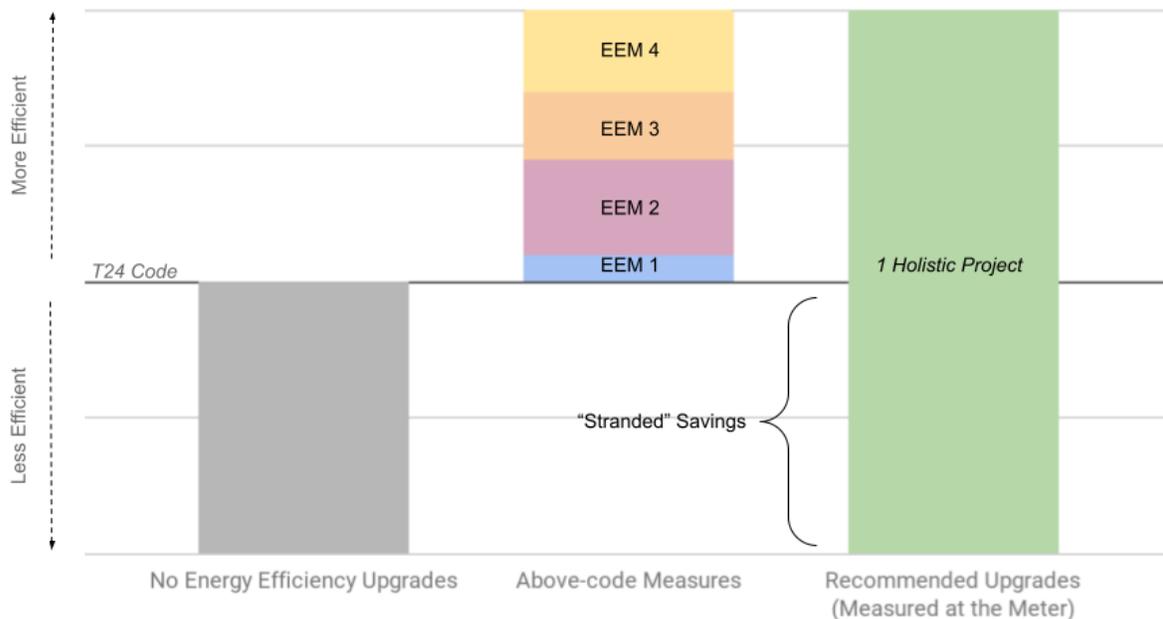
- **Enhance SoCalREN’s website and network toolkit** to make case studies and program resources more accessible; and
- **Explore enhancements to funding and financing services** to bring more EE and DER financing resources to the communities that need them most.

## Metered Savings Public Agency Program

### Metered Savings Program Description

California has an ambitious goal of doubling energy efficiency savings by 2030, but public agencies need resources to improve their aging infrastructure and contribute to statewide efficiency goals. Existing energy efficiency programs require bringing facilities above Title 24 standards, which can deter public agencies from acting due to financial constraints—leaving below-code facilities with the largest energy efficiency opportunities “stranded.” SoCalREN’s Metered Savings Program (the public facing name for the NMEC Public Agency Program) offers a new way to access “stranded” savings with project delivery support (see Figure 35).

**Figure 34. Metered Savings Program Agency Services Plan**

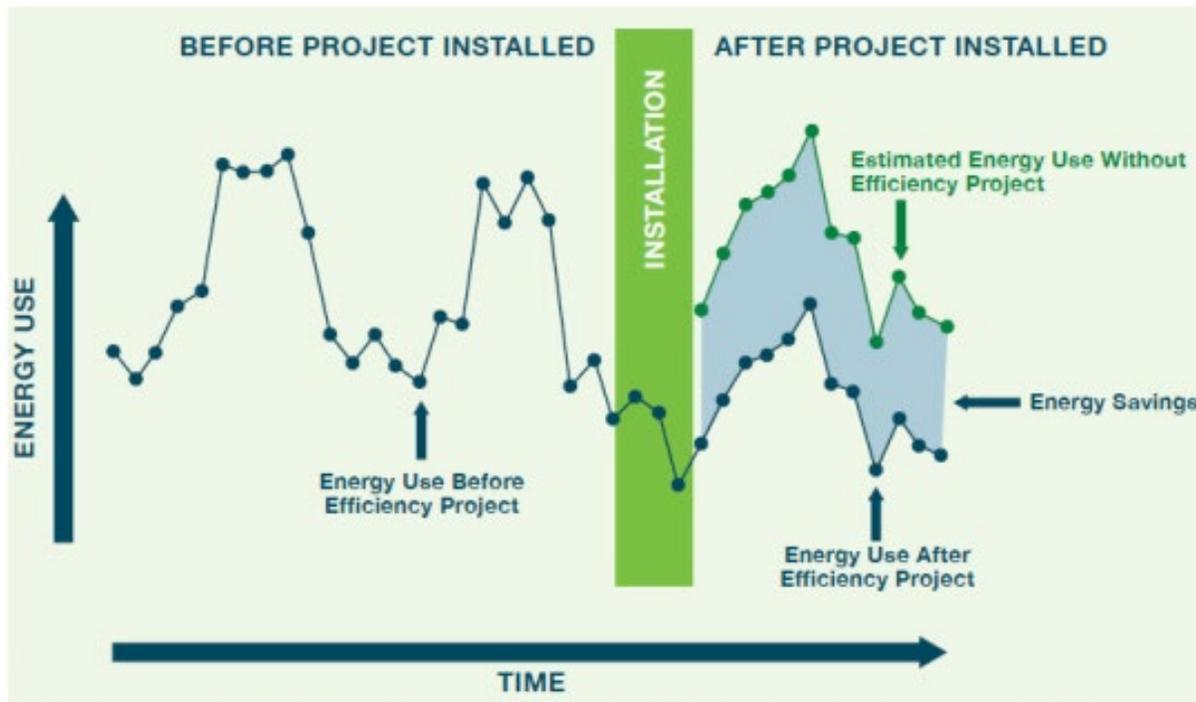


The Metered Savings Program uses normalized metered energy consumption (NMEC) to measure energy savings at the meter, unlocking new project opportunities that go beyond utility custom or

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deemed incentive eligible efficiency measures (see Figure 36). This comprehensive yet streamlined approach reduces the complexity of multi-measure projects, allowing for deeper savings with expedited project completion.

**Figure 35. Energy Savings Calculation using NMEC Approach**



State and Local Energy efficiency Action Network. 2012. *Energy Efficiency Program Impact Evaluation Guide*. Prepared by Steven R. Schiller, Schiller Consulting, Inc., [www.seeacon.energy.gov](http://www.seeacon.energy.gov).

This program provides an alternative to the existing utility incentive process for stranded savings in public agency buildings. The Metered Savings Program is a resource program, so energy efficiency savings from these projects contribute to SoCalREN sector goals, state energy efficiency goals, and energy efficiency portfolio cost-effectiveness calculations.

### Metered Savings Program Services

- Development of weather-normalized facility energy usage model.
- Development and submission of technical analysis for energy program participation applications.
- Third party technical review of program participation applications.
- Post-installation training for facility maintenance staff.
- Project savings reports to track persistence of savings and provide facility managers with ongoing energy use monitoring.

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### Metered Savings Program Objectives

- Ensure savings persist for the useful life of the energy efficiency measures.
- Reduce multi-measure project complexity.
- Support the goals of AB802 to capture stranded, to-code savings measures.
- Improve and reduce project completion timelines in the public sector.
- Contribute resource savings through SoCalREN’s Public Sector Programs.
- Achieve a minimum project savings threshold of 10 percent of overall facility energy usage.
- Provide training and educational materials to facility personnel to ensure persistence of savings well beyond installation completion.

### Metered Savings Program Performance

- In 2020, the program focused on implementing pilot projects and developing a strong project pipeline for 2021 and beyond.

**Table 26. Metered Savings Program Savings**

Metered Savings Program Savings			
2020 Completed Projects		Pipeline Developed*	
431,270 kWh	88% DAC	5,692,561 kWh	71% DAC
65 kW	94% DAC	1,122 kW	88% DAC
0 therms	--	20,611 therms	36% DAC
<i>*Savings are based on forecasted construction completion timelines. Includes total savings projected for 2021 and beyond.</i>			

**Table 27. Project Details**

Metered Savings Program Projects	
Metric	Performance
Projects Installed	3, 66% in DAC
Projects Developed	47, 75% in DAC
Projects Approved	15, 60% in DAC

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## Metered Savings Program Modifications

There were no substantial modifications to the Metered Savings Program in 2020. However, Program tools and templates were improved based on lessons learned from pilot project implementation. The Program practiced continuous improvement to Program marketing materials to enhance the participant experience, communicate the value of the Program, and remove barriers to customer participation.

## Metered Savings 2020 Strategies

Following a successful launch, the Program gained traction through proactive strategies driven by a vision of long-term success and addressing customer needs. The following are noteworthy strategies from 2020:

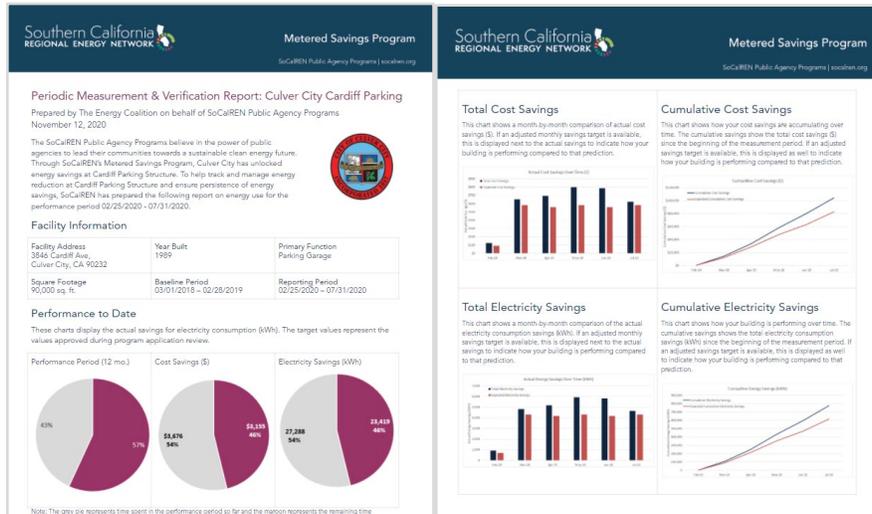
- **Refined Program participation coordination protocols, processes, and deliverables for a public agency strategy with the IOUs based on feedback** from 2020 meetings with agencies. The improved process calls for a coordinated and customer-centric presentation of Program services that facilitate an unbiased review of SoCalREN, SCE, and SoCalGas resources to ensure customers are able to make informed decisions on energy program participation. In coordination with the IOUs, SoCalREN updated messaging and presentation materials to minimize confusion and empower the customer throughout the decision-making process.
- **Presented Program pathways to agencies through the delivery of Agency Services Plans.** These plans outline energy efficiency measures identified, financial metrics, and Program services available to agencies through the Metered Savings Program. They educate the customer on various Program pathways available to them so they can make an informed decision on how to move forward.

Figure 36. Metered Savings Program Agency Services Plan



- **Developed IOU public sector NMEC handoff protocol in coordination with the IOUs.** Should an agency elect to pursue an IOU NMEC Program pathway, this protocol ensures a smooth transition of project resources for both the customer and the IOUs.
- **Developed tools and templates as needs arose** for future efficiency and timeliness of project review, approval, and close-out (i.e., technical review form, post-installation inspection form).
- **Utilized Project Savings Reports to inform agencies of their realized savings** quarterly after energy efficiency measures are installed. This tool utilizes the NMEC baseline energy model to capture and visualize weather-adjusted energy savings and is intended to ensure the persistence of savings well beyond installation.

Figure 37. Metered Savings Program Savings Report



- **Actively participated in statewide working groups and industry group meetings to drive NMEC policy** and ensure guidance is in the best interest of public agencies and their projects.
- **Worked to mitigate potential challenges arising from COVID-19** and impacts on installed projects. Participated in webinars and training regarding COVID-19 impacts on NMEC projects including COVID-19 as a non-routine event (NRE) and applying non-routine adjustments (NRA).

### Metered Savings Program Optimization/2021 Strategies

After its first full year of successful implementation, the Metered Savings Program will focus on delivering the projects on track for installation in 2021, scaling up program participation for future years, and continuing to incorporate customer feedback to maximize the value of program services. Metered Savings Program optimization initiatives for 2021 include:

- **Develop enhanced early project screening protocols** to ensure that engineering subconsultants review all aspects of a facility’s NMEC potential beyond the 10 percent electric savings threshold and to ensure predictable savings and efficient use of program funds.
- **Improve project screening timeline and cost-effectiveness** by leveraging internal staff and open-source tools such as Energy Charting and Metrics (ECAM) and/or NMEC-R to complete predictability analyses more cost effectively for simple load profiles.
- **Anticipate ongoing potential challenges from COVID-19** and impacts on Metered Savings Program projects as an NRE and identify NRA solutions to integrate into program processes to mitigate risks.
- **Develop and distribute marketing and communication materials** such as case studies on completed projects to continue to educate agencies on the benefits of an NMEC approach.

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- **Continue close collaboration with Commission staff and industry experts** to ensure program design and processes align with the evolving NMEC guidebook and to actively participate and provide feedback based on customer experience.
- **Develop new workpapers** to enable public agencies to take advantage of additional energy savings opportunities.

## 2020 Sector Strategies

In response to COVID-19, the SoCalREN Public Sector Programs developed and launched several new strategies:

1. **Conversations with SoCalREN** webinars to facilitate peer-to-peer best practice sharing and empower local energy leaders with education on energy efficiency strategies, financing opportunities, and SoCalREN’s comprehensive menu of services and support resources. The program hosted 12 webinars in this series, featured 7 agency Energy Champions as guest speakers, and facilitated a virtual panel for the Statewide Energy Efficiency Collaborative (SEEC) Forum. The SEEC panel featured the 5 SoCalREN regional partners sharing local implementation best practices in light of pandemic challenges. Additional details on the webinars can be found in Appendix A.
2. **Capacity Building Sub-Program** to provide technical training to agency staff and meet the unique maintenance and operations needs created by COVID-19. Through the 3-day training series, agencies learned to analyze energy- and money-saving opportunities (such as modified schedules and operations) and to maximize energy savings and performance through energy assessments, screening audits, and selection of proper equipment. This training series offered support during a time when agencies must rely more on internal staff and are expected to do more with fewer resources.



Figure 38. Capacity Building Sub-Program Outcomes and Participant Details

Energy Savings Project Potential



Knowledge Retention

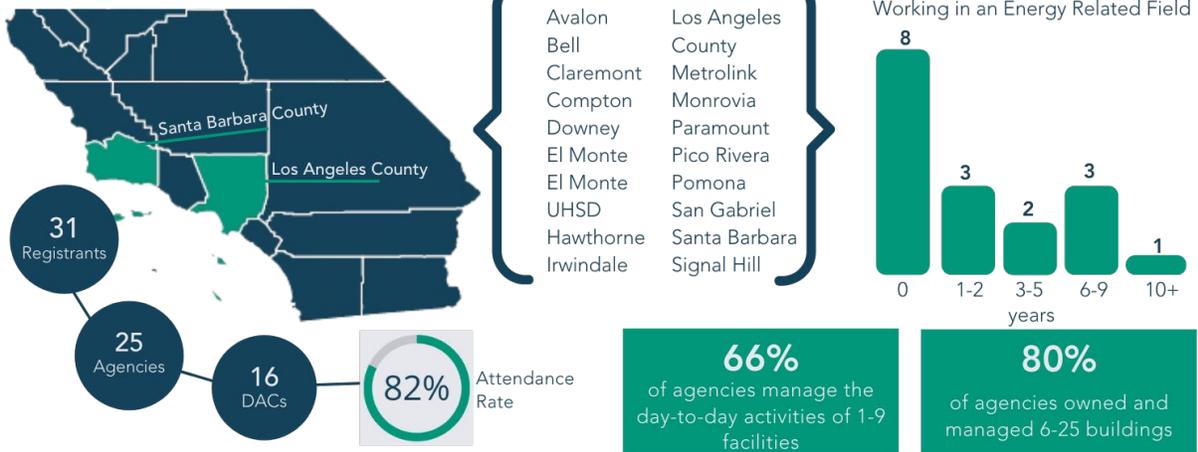


“ David Wylie is a terrific instructor and his classes have been most useful for work in energy management and in public agencies.  
- Lena Luna, El Monte UHSD ”

Agency Engagement



Participant Demographics

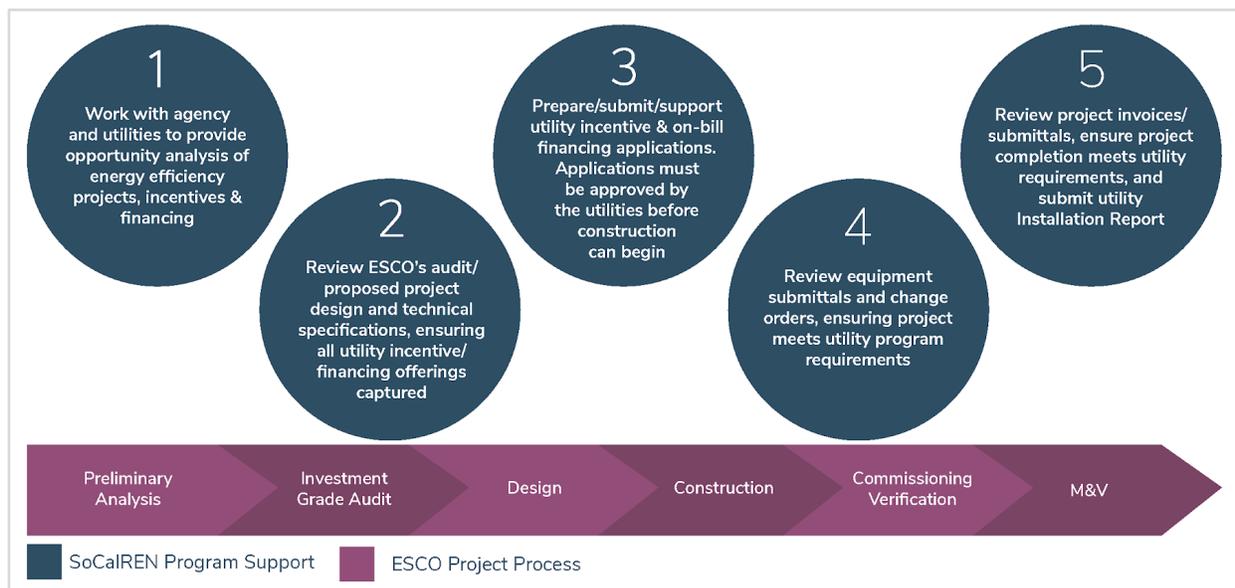


- Enhanced ESCO coordination strategy** to offer streamlined project delivery services when working with energy services companies on public sector projects and expand public sector access to energy performance contracts (EPCs). Through EPCs, ESCOs can provide comprehensive engineering and construction services for large (>\$1M) energy efficiency and DER projects. ESCOs are an important potential source of non-ratepayer financing. In 2020, SoCalREN prepared an ESCO guidebook to help educate agencies on the energy performance contract model and created an ESCO services comparison matrix to help agencies solicit and evaluate ESCO firms. SoCalREN

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joined the National Association of Energy Service Companies (NAESCO) and held coordination meetings with four ESCO firms operating in SoCalREN territory to discuss how the Project Delivery and Pathway to Zero Programs can complement energy performance contract offerings while maintaining objectivity as a technical advisor to customers.

**Figure 39. SoCalREN ESCO Coordination Process**



SoCalREN Public Agency Programs also implemented the below strategies in 2020 and delivered on the work described in the sections that follow.

## Grow the Program and Expand Reach

### Engage and Enroll

SoCalREN is committed to expanding reach across the territory and growing savings. In 2020, SoCalREN enrolled 29 agencies, bringing the total number of enrolled agencies to 166 or approximately 20 percent of the eligible agencies within SoCalREN's territory. Regional partnerships facilitated enrollment of 23 of these agencies.

Regional partners, described in more detail below, will continue to serve as key engagement liaisons to expand local agency enrollment, identify service gaps and training opportunities, and ensure ongoing agency participation in programs. The table and figure below reflect the Program's reach across counties in the service territory. Table 28 shows cumulative agency enrollments and Figure 40 shows cumulative enrollments by agency type.

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Table 28. Enrolled Agencies by County (cumulative and 2020 only)

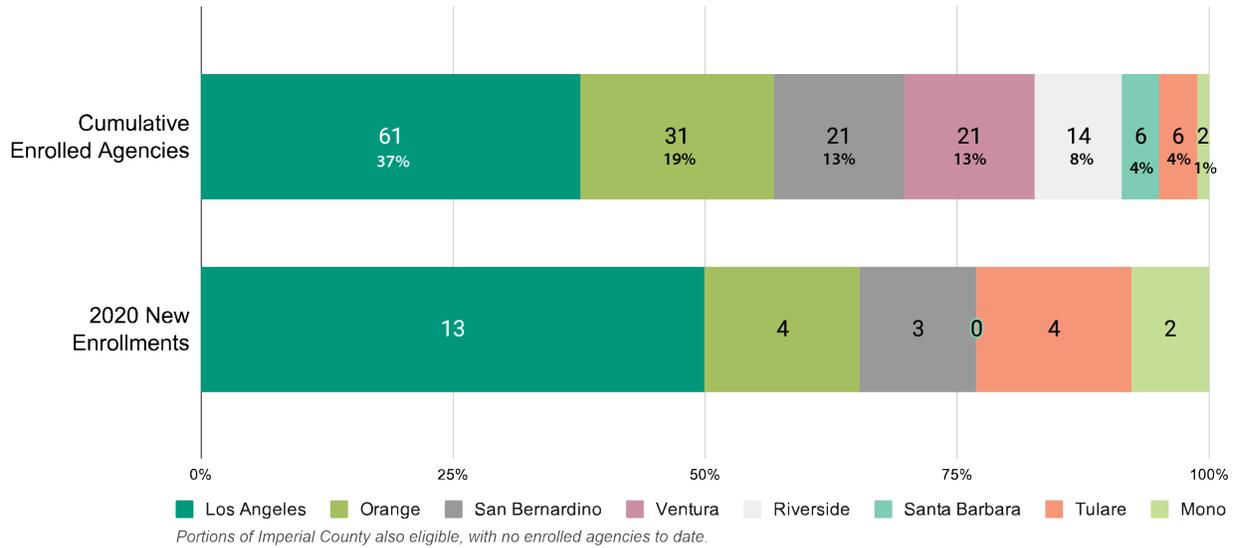
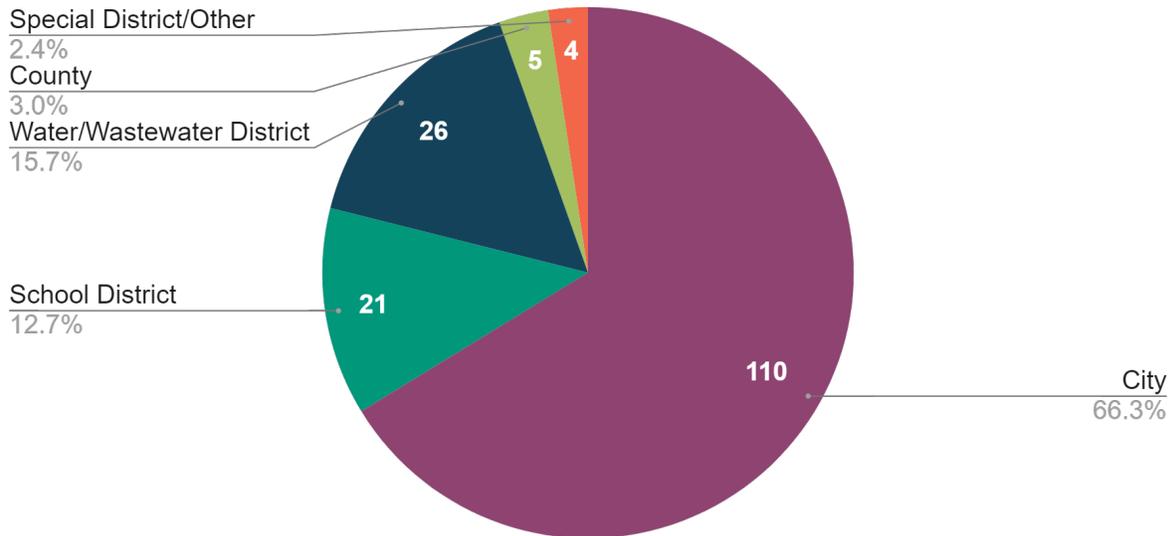


Figure 40. Cumulative Enrollments by Agency Type



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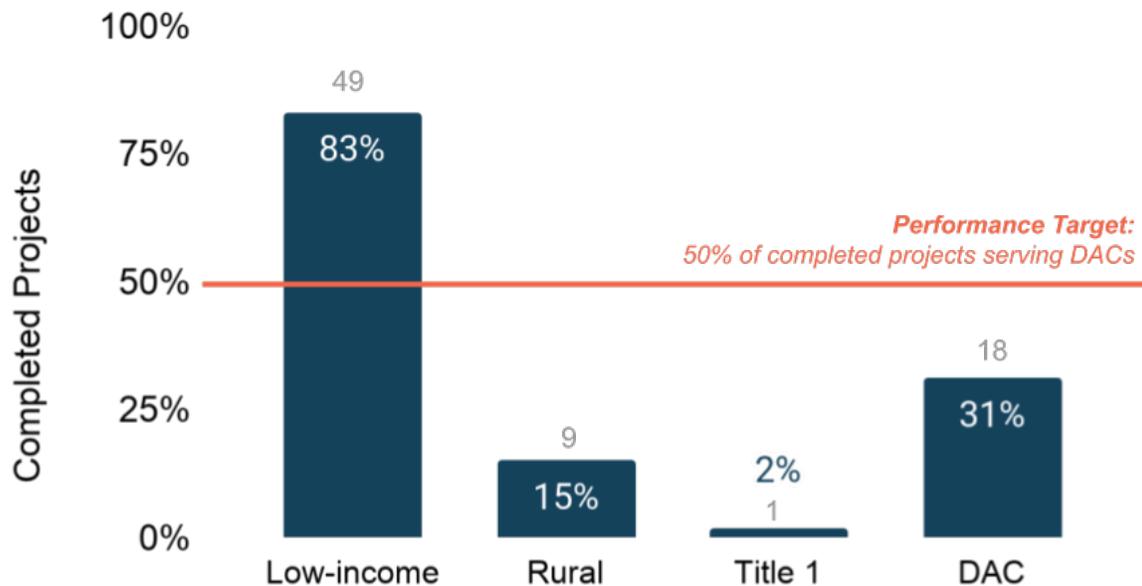
## Provide Services to Rural Hard-to-Reach (HTR) Communities and Disadvantaged Communities (DACs)

To demonstrate SoCalREN’s commitment to serving DACs, as defined by the latest CalEnviroScreen criteria, the Program aims to maintain a minimum of 50 percent of installed projects within communities that serve DACs. In 2020, 31 percent of the 59 projects completed support DACs. Additionally, 57 percent of enrolled agencies serve DACs, and 60 percent of these DAC agencies received services dedicated only to DAC agencies through the Pathway to Zero Program.

In order to further support DACs, SoCalREN enhanced Program offerings and services by securing non-ratepayer funds to design and implement a companion Sub-Program to Pathway to Zero called Benchmarking Call to Action. The Sub-Program was made available to enrolled DACs in 2020 and provides enhanced benchmarking support and technical assistance for audits that evaluate DERs as part of energy efficiency upgrades (see *External Funding Leveraged by Public Sector* below for more information). Many rural public agencies are not classified as DACs through CalEnviroScreen. In addition, the current definition of a HTR is limited to residential and small business customers and no standard definition for “underserved” currently exists for energy efficiency programs. In lieu of energy efficiency program guidance for rural public agencies, SoCalREN is defining rural as census tracts classified by Rural-Urban Commuting Areas (RUCA) codes developed by the United States Department of Agriculture (USDA) and as defined by the Veterans Health Administration.<sup>31</sup> Figure 41 details target versus actual performance metrics.

<sup>31</sup><https://www.arcgis.com/home/item.html?id=213f6b7bacc44650997f7a455c2b08aa>

Figure 41. Installed Projects Serving DACs (based on 2020 Installation Report submission)



## Regional Reach

SoCalREN continued to focus on a regional reach strategy to: (1) demonstrate regional reach and delivery of valuable services to the entire service territory, (2) strengthen communication processes among SoCalREN agencies and partners, (3) seek opportunities to enhance services in sub-regions, and (4) identify new opportunities and pilot programs to meet specific sub-regional needs. The strategy is described below.

- Market SoCalREN through agency registration.** In early 2020, SoCalREN launched an online agency registration strategy to register as many as possible of the 715+ eligible agencies in its territory to expand its network and funnel registered agencies into applicable programs. By registering on [socalren.org/join](https://socalren.org/join), public agencies gain access to an extensive library of information, tools, templates, and case studies and will also be introduced to new program opportunities. Adding this “pre-enrollment” step to the project delivery process is not only a strategy to expand the Program’s reach, but also provides opportunities to build agency capacity and expertise. In 2020, SoCalREN enhanced the resources available to registered agencies through the “network toolkit.” The toolkit is explained in more detail in Appendix B.
- Expand regional partnerships.** Regional partnerships were initiated to mitigate gaps created by SCE’s closing of Local Government Partnership programs and to leverage regional experts to better serve diverse communities across the region. Throughout 2020, SoCalREN Public Sector Programs

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built partnerships with regional community-based organizations and Councils of Government (COGs) to provide on-the-ground outreach and engagement to promote and enhance Program services. As a result, four additional regional partners were formally brought under contract by SoCalREN in 2020. Many of these organizations have established relationships with agencies working on energy efficiency efforts through Local Government Partnerships. This approach brings SoCalREN to eligible agencies that are not yet enrolled. It also supports the continuous engagement and delivery of existing projects and future pipelines. Regional partners enhance SoCalREN’s expertise and reach by leveraging their local knowledge, existing relationships with member agencies, and professional relationships that often extend beyond energy efficiency.

**Figure 42. Geographic Area Covered by Regional Partners**

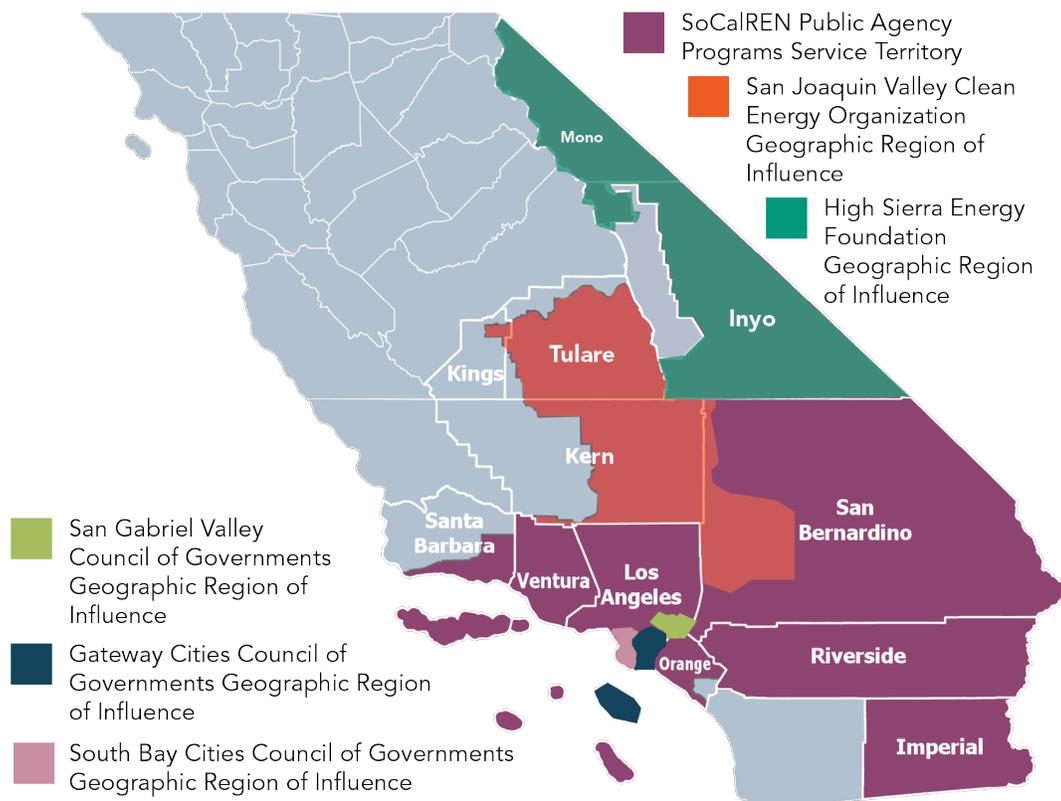


Figure 43 highlights the impacts achieved by the regional partnership efforts:

Figure 43. Regional Partnership Impacts

## 2020 Regional Partner Impacts



- Strengthen ongoing regional participation and guidance.** SoCalREN continues to collect input from local leaders and ensure it is delivering maximum benefit across all communities through the Advisory Committee. Quarterly meetings offer an avenue for committee members to provide advice, guidance, and support for SoCalREN's portfolio. The Advisory Committee also reviews program performance, receives regulatory updates, offers feedback, and engages in discussions on topics critical to SoCalREN's ongoing success.

### Conduct Marketing and Outreach

SoCalREN's communications efforts in 2020 were focused on **encouraging enrollment** for eligible public agencies and **increasing the engagement and capacity of agencies already enrolled in the programs**. The metrics presented in Table 29 were tracked throughout the year to measure/report on the success of SoCalREN Public Sector Programs' communications.

**Table 29. Marketing and Outreach Goals**

Objective	Annual Performance Goal	2020 Status	Percent Complete
Agency Registration	50 Agencies	28 <sup>32</sup>	
Capacity and Expertise	15 Outreach Activities	30	
	20 Unique Outreach Materials	34	
Customer Satisfaction	Minimum of 80%	92%	

See Appendix B for additional details on 2020 marketing and outreach activities.

## Sector Optimization/2021 Outlook

In addition to the optimization strategies outlined in each program-specific section, the strategies outlined below will support the successful implementation of all SoCalREN Public Sector Programs.

- Continue to **tune into the impacts of COVID-19** on public agencies to understand their needs and **quickly adapt program services** to address the unique challenges agencies face.
- **Identify and leverage additional external non-ratepayer funding** to enhance Program offerings, support agencies with funding and financing, and deliver energy and GHG savings.
- **Strategic marketing and outreach initiatives:**
  - Develop and implement strategies that support agency interdepartmental education on Program offerings and alignment of Program services with agency and state sustainability goals.
- Explore additional **opportunities to collaborate with community choice aggregators, IOUs, and IOU third party programs.**
- **Expand regional partnerships** and regional reach strategy.
- Communicate the value of SoCalREN Program services in health, safety, and reliability of public agency facilities and community at large.

<sup>32</sup>18 agencies registered before enrollment; 10 agencies registered but are not yet enrolled (totaling 28). 147 additional agencies registered after they had already enrolled.

## External Funding Leveraged by Public Sector

### Benchmarking Call to Action

#### BMCTA Sub-Program Description

Los Angeles County is always seeking external funds to support SoCalREN’s mission. Public agencies consistently provide feedback that they are looking for more support with benchmarking and DER technical services to meet local and statewide energy and climate policies and goals. The BMCTA Sub-Program,<sup>33</sup> funded by the CEC, was launched in response to agency feedback and includes additional technical services, such as enhanced on-site benchmarking, DER audits, and other technical support an agency may need to move DER projects forward. The BMCTA Sub-Program is offered as a sub-program to the SoCalREN Pathway to Zero Program. DAC agencies and facilities that are eligible for Pathway to Zero are also eligible for BMCTA.

SoCalREN offers energy analysis services and tools to empower agencies to make informed decisions about energy management through BMCTA. This enhanced benchmarking allows SoCalREN to conduct a more detailed and comprehensive energy analysis beyond the standard portfolio energy analysis services offered through Pathway to Zero. Additionally, SoCalREN provides strategies and recommendations for agencies to increase reliability, resiliency, and sustainability. DER audits help agencies determine which DERs and energy interventions would benefit them most while helping them achieve local and state energy, environment, and climate goals.

#### BMCTA Sub-Program Services

Through Pathway to Zero’s enhanced benchmarking, SoCalREN offers the following services:

- **Custom facility energy use reports:** a comparison of energy use intensity (EUI) between facilities of different sizes, demonstrating how EUI has changed over time and comparing a facility’s EUI with similar facilities within the agency and across other agencies.

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<sup>33</sup>Contract term is 2020–2021.

Figure 44. BMCTA Facility Benchmarking Snapshot



- **On-site benchmarking:** SoCalREN conducts an on-site visit to collect the necessary property and utility meter information to eliminate data gaps and reduce the data collection burden on agency staff.
- **AB 802 benchmarking regulation fulfillment:** SoCalREN ensures the agency is fulfilling AB 802 benchmarking regulations, a new requirement for select California facilities larger than 50,000 square feet.
- **ENERGY STAR certification support:** SoCalREN helps agency facilities earn the verifiable ENERGY STAR stamp of approval to prove that facilities are operating at maximum energy efficiency.

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BMCTA offers technical services, with a focus on DER audits on the following DER and sustainability-related strategies:



1. Demand Response (DR)



2. Electric Vehicle Charging Infrastructure



3. Solar Water Heating



4. Photovoltaic (Solar) and Battery Storage Systems (refer to Figures 45 and 46)



5. Green Rate Options

- SCE's 50 percent Green Rate or 100 percent Green Rate
- Clean Power Alliance's Clean Power rate option (50 percent) or 100 percent Green Power option

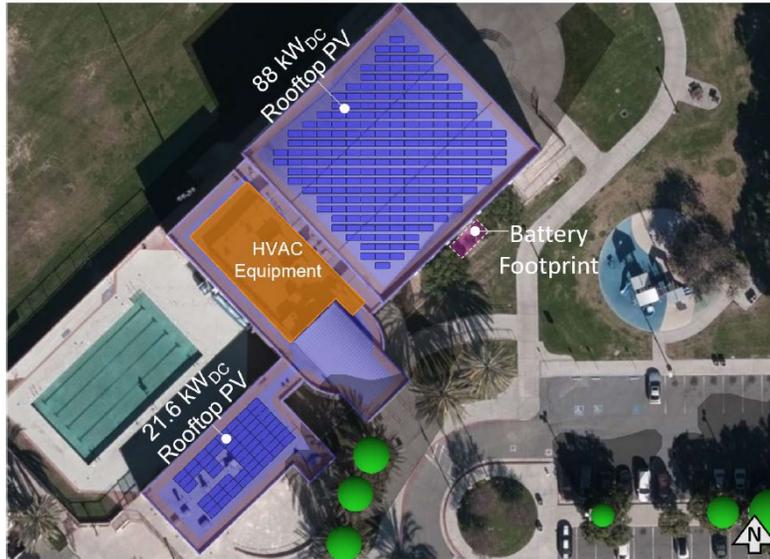


6. Permanent Load Shifting

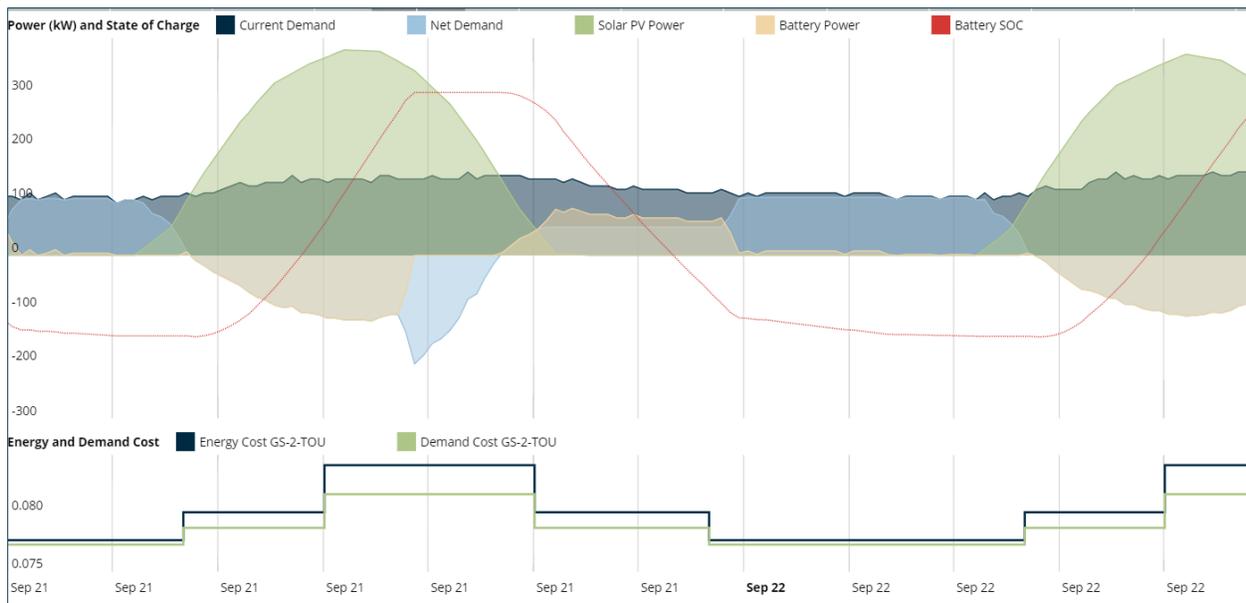


7. Water Efficiency

**Figure 45. Snapshot of Photovoltaic (solar) and Battery Storage System Layout Recommended for a Facility**



**Figure 46. Sample Daily Load Profile for a Facility Used in DER Analysis**

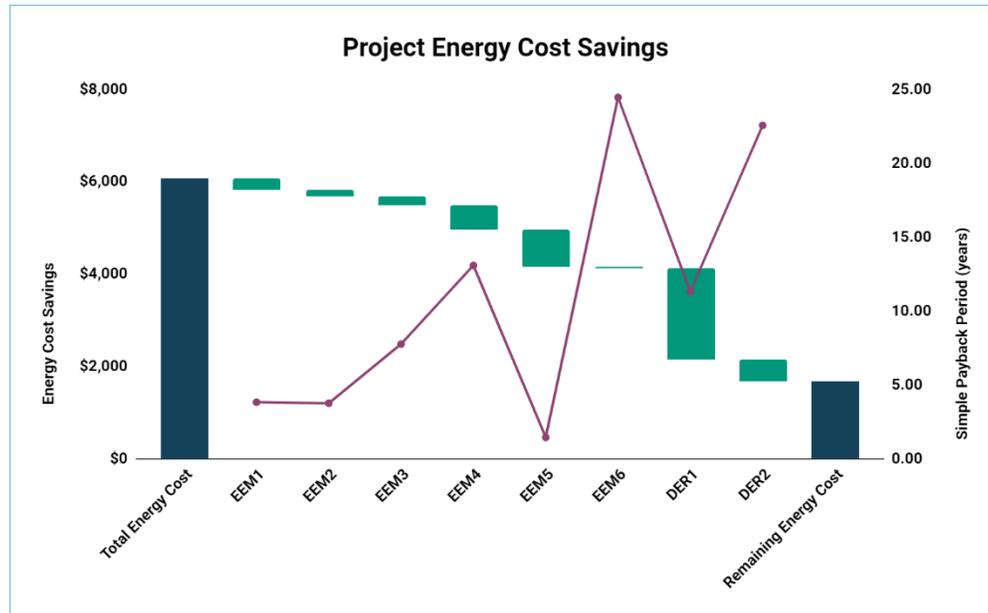


The BMCTA Sub-Program is seamlessly integrated with the Pathway to Zero Program and layers DER measures into the energy efficiency audit and Project Proposal. It provides the agency with savings and

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cost estimates as well as financing solutions for the recommended DER strategies. Figure 47 shows a sample energy measure cost and savings chart from the Project Proposal.

**Figure 47. Project Proposal Energy Efficiency Measures (EEM) and DER Costs and Savings Chart**



### BMCTA Sub-Program Objectives

The BMCTA Sub-Program complements and expands the reach of the SoCalREN's Pathway to Zero Program to:

1. Influence DAC public agencies to go beyond energy efficiency retrofits by utilizing benchmarking data and tools;
2. Influence DAC public agencies to talk to their facility operators about energy usage and monitoring;
3. Increase the number of DAC public agencies that engage communities in DER energy actions and strategies, thereby reducing overall community energy consumption; and
4. Increase the ability of public agencies to meet local, regional, and state climate and energy goals.

**BMCTA Sub-Program Performance**

**Table 30. Program Performance Metrics**

Benchmarking Call to Action Program Performance		
Metric	Goal	Completed
Site Supported With On-Site Benchmarking	25	27
DER Audits Provided	15	13
Additional DER Technical Services Provided	N/A	4
GHG Reductions Identified (MT CO <sub>2</sub> e)	N/A	5,410

*Note: MT CO<sub>2</sub>e = million tons of carbon dioxide equivalent.*

**Figure 48. GHG Reduction Equivalencies**



Source: EPA Greenhouse Gas Equivalencies Calculator at <https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator>

**Table 31. Frequency of DER Strategies Supported**

DER Strategies Supported	
Strategy	Frequency of Inclusion in DER Audit
Photovoltaic (solar) and Battery Storage Systems	8
Electric Vehicle Charging Infrastructure	2
Water Efficiency	5
Other	1

**Table 32. DER Audit Metrics**

DER Audit Metrics	
DER Audit Metric	Value
Water Saved (gallons) Identified	868,380
Annual Electric Savings (kWh) Identified	849,230
Peak Demand Savings (kW) Identified	356
Annual Gas Savings (therms) Identified	685,733

## Workforce Education and Training Sector Programs

### Overview of Sector Performance

SoCalREN WE&T strives to build a local workforce that can deliver high-quality energy efficiency services to all segments of the Southern California ratepayer community by providing the skills and training needed. SoCalREN facilitates the participation of underrepresented individuals and businesses in the Energy Efficiency Sector through workforce and business development and capacity building.

The Program offers continued capacity building support for diverse Small/Disabled Veteran/Minority/Disadvantaged Business Enterprise (S/DV/M/DBE) contractors through the E-Contractor Training Program.

The skilled labor demands of the energy sector are only growing due to the lack of qualified applicants, which is due to the increase in green technologies and also the lack of curricula available to train entry-level participants. The lack of skilled labor requires on-going support to build capacity within a small/diverse business may need, which includes skills training for new and emerging technologies in the green sector. Small/diverse businesses need to be equipped and prepared with available resources such as access to capital and bonding in order to grow in the clean energy sector.

SoCalREN WE&T responds to the skilled labor shortage by building a pipeline of qualified workers and contractors through youth workforce education and training, and capacity building training around small businesses in order to keep up with the demand of project opportunities from the Energy Efficiency Sector.

### WE&T Program Services

This non-resource program provides many services to support participants by building partnerships specific to each WE&T Program intervention.

- Provides Request for Proposal (RFP) bidding preparation training and assistance for small business contractors and Women-, Minority-, Disabled Veteran-Owned Business Enterprises (WMDVBE) for EE project opportunities.
- Implements the **E-Contractor Training Academy** which prepares small and diverse contractors to compete and perform energy efficiency retrofit projects through a series of five to seven weekly seminars. These seminars introduce contractors to green building standards and technologies, access to capital, bonding, and the fundamentals of Title 24 Codes and Regulations.
- Provides **disadvantaged youth career technical education** with a focus on Energy and Sustainability to help cultivate the skilled workforce necessary to go into the Energy Efficiency

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Sector. This is achieved through the ACES Pathway Program, described further below. WE&T Program Performance

The SoCalREN WE&T Program strives to help build a skilled workforce in Southern California by providing a variety of training resources for local students and diverse contractors. SoCalREN takes a comprehensive approach to help local industries build capacity within the EE workforce to support energy efficiency retrofit projects, both in the residential and public sectors.

### Disadvantaged Youth Career Technical Education

The ACES Pathway Program provides disadvantaged youth with the opportunity to build a pathway to a brighter future with a career in an ACE field. Participation in ACES improves educational achievement and removes barriers to higher education by co-enrolling high school students in community college courses. The credits they earn are transferable to campuses within the California State University and University of California systems.

In addition, ACES participation offers students paid summer internships that pave the way for secure employment in well-paid careers by providing hands-on work experience alongside industry professionals in the engineering, construction, and municipal sectors.

During 2020, the SoCalREN WE&T Program established 22 new partnerships and provided 19 paid internships to ACES participants.

Table 33 provides examples of organizations that work in partnership with ACES.

**Table 33. ACES Internship Partner Organizations**

Partner Organization	Description
GoEngineer: SOLIDWORKS	3-D CAD modeling software and training site
Hub Cities Consortium	Los Angeles County America’s Job Center of California
Los Angeles Community College District (LACCD)	Community college district offering dual enrollment courses for ACES Program
US Green Building Council – Los Angeles (USGBC-LA)	Organization focused on sustainability in the environment and construction industry.
National Association of Minority Contractors – Southern California	Organization focused on women and minority owned construction businesses.
National Electrical Contractors Association	Organization focused on representing the electrical contracting industry.

## At-Risk Youth Career Technical Education

The Green Path Careers (GPC) Program provides at-risk youth access to the emerging EE sector by offering education, training and work experience in the field through certification training from the Building Performance Institute (BPI). This initiative is made possible through collaboration between the SoCalREN, SGVCOG, WDACS, and Hathaway-Sycamores Child and Family Services.

The program is designed to address the barriers at-risk youth face when moving into the growing workforce, while addressing the EE workforce expansion needs. GPC aims to assist at-risk youth by eliminating the barriers of the EE workforce sector, by providing certification training, supportive services, and the coaching needed to emerge successful and begin their EE career.

The GPC Program provides a multi-step approach that assists a participant in entering the Energy Efficiency workforce from the initial recruitment phase to becoming Job/Career Ready.

In addition, GPC offers participants the opportunity for a paid work experience program that paves the way for secure employment in well-paid careers by providing hands-on work experience alongside industry professionals in the Energy Efficiency Sector. During the 2020 pilot launch, the SoCalREN WE&T Program enrolled 10 new participants.

## Contractor Training and Support

SoCalREN offers standardized and customized training support services to help existing small businesses identify and participate in EE projects and program opportunities. In 2020, the SoCalREN program hosted seven virtual training workshops, educating local contractors about emerging opportunities within the Energy Efficiency Sector and also the fundamentals of entering this new workspace.

These courses offered a detailed look into entering the Energy Efficiency Sector, the fundamentals of sustainability and green building technologies, how contractors can grow their business by taking advantage of available financial resources, and the next steps required to participate. Table 34 provides data from 2020 virtual events, and provides participation information for contractors who enrolled in SoCalREN courses.

**Table 34. 2020 SoCalREN WE&T Contractor Training Courses**

Course	Contractors Registered	Contractors Attended
Green Building Opportunities	72	41
E-Contractor Academy Session 1	52	37
E-Contractor Academy Session 2	57	52
E-Contractor Academy Session 3	57	34
E-Contractor Academy Session 4	57	40
E-Contractor Academy Session 5	57	31
E-Contractor Graduation	40	40

## WE&T Program Modifications

In 2020, the Program continued to streamline its systems and processes and added new strategies in order to meet the skilled labor demand. Modifications to the WE&T Program design further leveraged partnerships to drive and expand Program offerings. These modifications were as follows:

- Offered training courses specific to new and emerging contractors in the Energy Efficiency Sector so that small and diverse contractors could more easily participate in upcoming project opportunities.
- Leveraged existing partnerships and resources to offer customized one-on-one technical assistance to contractors and how to build upon their existing business model to increase their capacity and be able to enter the EE market.
- Convened with SoCalREN IOU partners monthly to develop a coordinated “team” approach and leveraged alignment across PAs and REN programs.
- Developed a detailed Program dashboard so that all necessary data points for the Program’s performance can be monitored and tracked.

## WE&T 2020 Program Strategies

The following are noteworthy 2020 strategies that built on SoCalREN’s record of successful program design.

1. Continued to meet market gaps.
  - Coordinated with local market drivers to identify the gaps in curriculum available to contractors trying to penetrate the EE market.
2. Developed strategies to build capacity within SoCalREN Programs through a collaborative approach by:

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- Identifying gaps in training across REN programs.
  - Collaboratively expanding reach by cross utilizing.
3. **Improved data collection and Program performance management.** These and other enhancements will help identify best practices and improvements needed within the existing programs. Also, they will act as the necessary data for further REN program evaluation.

### WE&T Program Optimization/2021 Outlook

After a successful year in which materials, processes, and partnerships were developed, PY 2021 for the WE&T Program will focus on scaling up participation and continuing to identify strategies that support the overall EE industry workforce. WE&T Program optimization initiatives for 2021 include:

- WE&T HUB – virtually and within regional workforce centers.
- Green Path Careers – skills training for targeted DAC (foster youth, returning citizens).
- ACES Pathway Program expansion by providing a direct pipeline to EE career sector.
- Cross-Sector Collaboration and WE&T marketing and outreach.

## Finance Sector Programs

### Residential Loan Loss Reserve (Multifamily Financing Program)

#### Program Description

The Multifamily Finance Program (MFF Program) broadens access to financing for more multifamily property owners/contractors for EE upgrades by allowing a financial institution partner to modify its underwriting criteria and accept more risk than it would otherwise on qualified projects. The MFF Program design incorporates a credit enhancement that reduces the borrowing rate for the borrower, and the design incorporates features that make the MFF Program process easy for the borrowers, financial institutions, and contractors, thereby encouraging investments in EE.

#### Program Services

The MFF Program provides a credit enhancement for loans to fund the installation of a set of EE measures recommended through an energy assessment conducted by the Multifamily Program staff and property owner's contractor. The credit enhancement absorbs any losses before the lending partner does, and funds revolve as loans amortize.

The MFF Program offers Energy Service Agreements (ESAs) with an interest rate buydown and a loan loss reserve (LLR). ESAs are an off-balance sheet financing solution that allows customers to implement EE projects with zero upfront capital expenditure. Through the ESA, the ESA provider pays for all project development and construction costs. Once a project is operational, the customer makes service charge payments for actual realized savings. The interest rate buydown makes the financing option attractive to property owners as they can finance projects at a below market rate while the LLR attracts lending capital to the market.

#### Program Objectives

The MFF Program addresses the funding market barrier, thus promoting more long-term energy benefits for multifamily housing through funding the implementation of comprehensive EE upgrade measures. The MFF Program aims to (1) assist property owners and property managers with making informed decisions about the cashflow associated with EE improvements, (2) offer credit enhancements to decrease market-based interest rates, and (3) facilitate additional whole-building EE measure installations, further encouraging investments and market participation in EE.

## Program Performance

In 2020, the MFF Program built out the infrastructure for processing loan applications by creating a web-based application portal and dashboard.

The screenshot shows a web application interface for creating a monthly payment proposal. The page title is "New Proposal" and the main heading is "Create a Monthly Payment Proposal". A navigation sidebar on the left includes links for "Finance Estimate", "Welcome Daniel!", "New Proposal", "Proposals", "Applications", "Communication Log", "Help & Resources", and "Sign Out".

The main content area contains the following sections:

- Project Location:** Includes fields for \*Address (Address Line), \*City, \*State (California), \*Zip Code (12345), \*Utility (dropdown), and \*Borrower Type (Commercial/Non-Profit).
- Customer Information:** Includes fields for \*First Name, \*Last Name, \*Legal Company Name, and \*Email Address.
- Financial Fields:** Includes \*Project Cost (\$ 0.00), Net Amount Financed (\$ 0), Preferred Term (Years) (dropdown), Rebate/Incentive (\$ 0), Annual Energy Savings (\$ 0), and Annual Maintenance Savings (\$ 0).

A "FINALIZE MY PROPOSAL" button is located at the bottom of the form. A footer note states "Copyright © 2020 | National Energy Improvement Fund LLC | All rights reserved. | Privacy Policy" and a small asterisk indicates required fields.

The MFF Program prepared marketing materials for contractors and customers to show the benefits of using financing to fund energy savings opportunities using a net cash flow analysis. Such marketing is used to facilitate conversations with property owners, and each project receives a custom analysis based on the energy savings identified in the property assessment report.

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SoCalREN Multifamily Finance Program  
Proposal Example

## Monthly Payment Proposal for Pacific View Apartments

### Project Summary

Jeremy, the Contractor of Jeremy's Efficiency Solutions, LLC, has engaged the National Energy Improvement Fund (NEIF) to offer a monthly payment plan for your project. The figures on this sheet explain the payments and savings calculated specifically for your project. If you are interested in moving forward with this offer, let us know and we will submit your project for approval. *Please note: Monthly payment estimates are subject to credit review.*

### Project Saving Estimates

Annual Savings:	\$22,500.00	Projected energy cost savings over one year
10 Year Savings:	\$225,000.00	Projected energy cost savings over ten years
6 Months Cost of Delay:	\$11,250.00	Forgone energy cost savings if you wait 6 months to install the project

### Monthly Payment Estimates\*

Term	Monthly Savings	Monthly Payment	Net Monthly Cash Flow
3 Years	\$1,875.00	\$1,922.79	-\$47.79
4 Years	\$1,875.00	\$1,474.91	\$400.09
5 Years	\$1,875.00	\$1,199.83	\$675.17

### Next Steps

**Step 1:** Review this offer and either click the I am Ready to Apply button in your email, or notify your contractor/the Multifamily Finance Program that you want to move forward with this offer.

**Step 2:** You will receive an email with a link to a secure online application within one business day.

**Step 3:** Receive notification of approval, sign closing docs, and begin equipment installation.

### Questions about this quote or next steps?

- Contact Multifamily Program at (877) 785-2237 or email [multifamily@socalren.org](mailto:multifamily@socalren.org).
- Contact the National Energy Improvement Fund at (720) 724-7673 or email [commercialfinance@neifund.org](mailto:commercialfinance@neifund.org).

\*This proposal uses projected energy and maintenance savings data provided by your contractor. Many factors can affect the energy savings estimates as well as the realization of these estimated savings once the project is installed. Multifamily Finance Program encourages the customer to review these numbers with their contractor.  
Project ID #10209, created on: 9/11/2019 SoCalREN10209



### Project Cost Overview

Project Cost: \$75,000

Incentives: \$14,000

Net: \$61,000

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[socalren.org/multifamily](http://socalren.org/multifamily)

## 2020 Strategies

The MFF Program experienced launch delays related to the COVID-19 pandemic. Traditional banks were targeted as the MFF Program’s lending partners, but they were unwilling to commit to the Program due to fears around tenant occupancy that could potentially impact property owner’s ability to repay loan commitments. The MFF Program had two potential lenders identified in 2020, but both decided against participation after several months of conversations.

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While the MFF Program was unable to secure a lending partner, significant progress was completed on other operational aspects of the Program, including:

- Completed development of the web-based financing application portal.
- Prepared several contractor and customer facing marketing materials to promote the finance offering.
- Completed two training webinars:
  - Internal training for program account managers to educate them on the financing offer and how to navigate the portal.
  - Training for participating contractors on the offer details and how to sell to their customers.
- Identified a private investment group that specializes in funding major EE upgrades using ESAs.

### Program Optimization/2021 Strategies

MFF Program launch is scheduled for early Q2 in 2021. Program strategies will include:

- Fully execute agreement with private investment group.
- Additional training for Account Managers and participating contractors.
- Initiate marketing campaign to support Program launch.
- Provide customer support to review and evaluate financing options.
- Assist customers with submitting financing applications.

## Public Agency Revolving Savings Fund (RSF)

### RSF Program Description

SoCalREN's Revolving Loan Fund, publicly known as the Revolving Savings Fund (RSF) is a cross-cutting financing program designed to accelerate energy upgrades to buildings and infrastructure owned by enrolled public agencies. The RSF offers a unique form of up-front construction financing for small to midsize projects at zero percent interest that can be paired with other financing options.

The RSF aims to accelerate the implementation of energy projects that would otherwise be delayed pending budget allocation by providing the funds for approved but not-yet-budgeted projects. Loans are financed with a \$2.2 million, non-ratepayer initial seed capital account secured from the CEC. Commission ratepayer funds support program management and marketing.

The RSF is a catalyst for agency enrollment and project development that prioritizes serving disadvantaged communities to increase energy efficiency adoption. The program offers a unique resource to public agencies to overcome budgetary barriers through a low-cost financing solution.

Figure 49. How SoCalREN’s RSF Works



### RSF Program Services

- **Financial analysis** and project economics presented via a project proposal that helps structure the RSF loan as part of a project’s funding and financing strategy.
- **Long term financing strategy and support** that ensures the short term RSF loan is successfully paid back and that the agency has the support to secure any applicable long-term financing.
- **Short term loan** at zero percent interest via a streamlined approval process and with a template board resolution to facilitate the approval process.
- **Project management and financial advisory support** to adequately present the financing structure and support agency stakeholder buy-in.

### RSF Program Objectives

- Stimulate agency enrollment in the SoCalREN Public Sector Programs, increase overall agency participation in energy efficiency programs, and accelerate project development.
- Assist public agencies in overcoming the barriers to capital due to rigid funding and budget requirements/restrictions.
- Provide a low-cost solution for energy efficiency project financing for public agencies.

## RSF Program Modifications

The SoCalREN Revolving Loan Fund (RLF) was rebranded to the Revolving Savings Fund (RSF) and enhanced with Program modifications based on agency feedback in 2020. The loan term was extended from two years to five years, enabling the fund to act as a stand-alone financing option as agencies face budgetary challenges. Additionally, the 1 percent administration fee was waived for all participants through 2020, and RSF is now offered for all projects, regardless of incentive program pathway, to increase uptake. RSF now offers an earlier application submission to reserve funds for 3 months ahead of signing the Loan Agreement to provide agencies with certainty that the funds will be reserved while other project details are finalized.

## RSF Program Performance

After launching the program modifications in Q4 2020, the RSF focused on targeted outreach to agencies with updated marketing collateral, talking points, and frequently asked questions (FAQs). Highlighting the limited time, waived 1 percent administration fee and the extended loan term served as a significant driver to pursue RSF over more conventional loans. Three RSF applications were submitted in 2020 to reserve the full \$2.2 million in funds upon application approval (approved in 2021).

**Table 35. Revolving Savings Fund Program Performance**

Revolving Savings Fund Program Performance		
Tactic	Indicator	2020 Performance
Deliver RSF Program “loan informational overviews” to potential borrowing agencies	Number of touch-points where RSF Program is presented	38
Deliver Project Proposals that present project economics with an RSF loan	Number of Project Proposals delivered	12
Evaluate an agency’s ability to take advantage of the RSF loan	Number of RSF loan applications	3
Provide eligible agencies an opportunity to use an RSF loan	Number of agency-approved loans	None
Enable savings by funding projects with RSF Program loans	Number of RSF Program loans awarded	
	RSF dollar amount issued	\$0
	Energy savings attributed to RSF-funded projects	2,896,983 kWh 383 kW
		26,698 therms

**Table 36. Revolving Savings Fund Commitment Pipeline**

Revolving Savings Fund Commitment Pipeline						
Total CEC Funds Available	Project Pipeline	Committed Funds Pipeline	Preliminary Loan Application Submitted	On-Bill kWh Savings	On-Bill kW Savings	On-Bill therm Savings
\$2,200,000	8	\$3,941,678	\$2.2 million	2,896,983	383	26,698

**Table 37. Revolving Savings Fund Project Details**

Revolving Savings Fund Project Details						
Agency Name	Project Name	On-Bill Energy Savings (kWh)	On-Bill Energy Savings (therms)	Construction Value Estimate	Audit Completion Timeline	Application Submittal Date
Costa Mesa	Costa Mesa City Hall	988,218	--	\$1,122,000	Awaiting Agency Approval	2/28/2021
Pomona	Pomona Public Library	262,056	1,925	\$1,029,831	Submitted to SoCalREN	12/17/2020
Pomona	Pomona Palomares Park and Community Center	100,500	--	\$509,380		
Palmdale	Palmdale Various Boiler Replacement	--	23,541	\$258,969	Submitted to SoCalREN	12/18/2020
Palmdale	Palmdale Various Whole Building	353,814	1,232	\$628,376		
Colton Joint Unified School District (USD)	Colton Joint USD Joe Maca MS	113,153	--	\$137,182	Submitted to SoCalREN	12/18/2020
Oxnard	Oxnard Wastewater Treatment Plant Generator Mech	129,967	--	\$43,840		

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Revolving Savings Fund Project Details						
Agency Name	Project Name	On-Bill Energy Savings (kWh)	On-Bill Energy Savings (therms)	Construction Value Estimate	Audit Completion Timeline	Application Submittal Date
Pleasant Valley County Water District (PVCWD)	PVCWD Well Pump Overhauls	949,275	--	\$212,100	Awaiting Agency Approval	1/31/2021
<b>TOTALS</b>		<b>2,896,983</b>	<b>26,698</b>	<b>\$3,941,678</b>	--	--

### RSF 2020 Strategies

The RSF Program services were designed to be delivered alongside the Project Delivery Program and Pathway to Zero. However, COVID-19 has created budgetary challenges for public agencies as tax revenues have shrunk and agency priorities have shifted. To address these challenges, RSF was enhanced to enable agencies to advance energy efficiency projects despite the economic consequences of the pandemic. After successfully launching the rebrand and program modifications, the following noteworthy strategies were deployed in 2020:

- Incorporated feedback from 2019 SoCalREN annual satisfaction survey to modify program terms and offerings.
- Enhanced RSF talking points, FAQs, and marketing collateral to conduct targeting outreach and engagement for agencies.
- Extended offering for all projects regardless of incentive program pathway to increase participation uptake.
- Extended borrowing loan term from 2 years to a 5-year maximum for fund to act as a stand-alone financing option.
- Temporarily suspended the 1 percent administrative fee through the end of 2020 for all participants.
- Offered an earlier application submission to reserve funds for 3 months ahead of signing the Loan Agreement Application.

Figure 50. RSF Fact Sheet

**Southern California REGIONAL ENERGY NETWORK** **Revolving Savings Fund**  
SoCalREN Public Agency Programs | [socalren.org](http://socalren.org)

Apply for SoCalREN's 0% interest Revolving Savings Fund today!

**Benefits**

- ✓ **0% interest rate:** no interest payments over the life of the loan
- ✓ **Easy process:** a simple application, efficient processing, and allocation of funds within 2 months make Revolving Savings funding an easy "yes"
- ✓ **A proven model:** revolving funds have been used effectively nationwide, so you can rest assured this innovative approach is safe for your agency
- ✓ **SoCalREN support:** the Revolving Savings Fund is part of a suite of customizable services, including project management, incentive application, procurement, and other support SoCalREN provides for enrolled agencies

**How It Works**

The SoCalREN Revolving Savings Fund (RSF) supports energy efficiency upgrades of public agency facilities by providing the financing your agency needs to make your project a reality. Loans can provide upfront construction financing to enable your project to move forward today, unlocking energy cost savings now. The repayment term for RSF is up to five years and for a limited time, the 1% service fee is waived for eligible agencies. Speak with a SoCalREN Project Manager to determine your eligibility.

**How it Works: Revolving Savings Fund Cycle**

- Contact your SoCalREN Project Manager to determine if your project qualifies for RSF.
- Submit your RSF application with SoCalREN support to receive formal approval and reserve funds.
- Receive a loan offer letter and obtain governing board approval.
- Receive funding following governing board approval and signing of loan agreement.
- Install your energy efficiency project.
- Obtain utility rebates/incentives and On-Bill Financing (OBF), if applicable.
- Repay loan with one-time service fee so the cycle can continue!

Email us at [info@socalren.com](mailto:info@socalren.com) or visit [socalren.org/RSF](http://socalren.org/RSF) to get started!

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## RSF Program Optimization/2021 Outlook

After successfully submitting three applications to reserve the full \$2.2 million in funds, 2021 will focus on disbursement of funds, developing a waitlist for applications, and continued optimization initiatives.

- **Disbursement of funds** via strategies that encourage project timelines stated in RSF applications.
- **Waitlist of applications** via development of a queue based on DAC status, disbursement timeline, and date of application submission.
- **Continued optimization** via development of tracking tools for the availability of funds and payment schedules.
- **Additional external funding** to be sought to add more seed funds and increase the number of projects able to leverage the fund.

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## Appendix A: Public Sector Programs Marketing and Outreach

SoCalREN's communications efforts in 2020 were focused on encouraging enrollment for eligible public agencies and **increasing the engagement and capacity of agencies already enrolled in the Program.**

### Agency Registration

In February 2020, SoCalREN Public Sector Programs launched a new online registration strategy ([socalren.org/join](https://socalren.org/join)) for building a pipeline to agency enrollment at events and other public outreach opportunities. Due to COVID-19, agency registration pivoted to an online strategy, emphasizing the benefits of our library of resources in the online network toolkit. Resources developed and added to the toolkit include tips on energy efficiency projects, marketing tools such as web badges and social media posts for agencies to share their commitment to energy efficiency with their community, and access to webinars and other capacity building opportunities. Below are a few key metrics documenting the success of the new registration strategy:

- The new web page [socalren.org/join](https://socalren.org/join) received 1,090 page views.
- 175 agencies registered for the network toolkit including:
  - 147 agencies already enrolled in SoCalREN;
  - 10 agencies not enrolled (and had not yet enrolled as of 1/21/2021); and
  - 18 agencies registered and later “converted” to enrollment.
- The network toolkit page received 1,439 page views including:
  - 44 resources made available to registered agencies; and
  - Agencies downloaded 108 resources from the network toolkit.

Website traffic for sessions that included the toolkit registration page came primarily from the following sources detailed in Figure A-1.

Figure A-1. Toolkit Registration Webpage Traffic Sources

Source / Medium	Acquisition			Behavior		
	Users	New Users	Sessions	Bounce Rate	Pages / Session	Avg. Session Duration
<b>Socalren.org/join traffic</b>	<b>434</b> % of Total: 3.16% (13,748)	<b>343</b> % of Total: 2.49% (13,761)	<b>672</b> % of Total: 3.28% (20,508)	<b>4.91%</b> Avg for View: 12.94% (-62.04%)	<b>5.58</b> Avg for View: 2.66 (109.96%)	<b>00:06:05</b> Avg for View: 00:02:06 (190.32%)
1. (direct) / (none)	258 (56.21%)	214 (62.39%)	358 (53.27%)	5.59%	6.60	00:07:00
2. google / organic	52 (11.33%)	28 (8.16%)	75 (11.16%)	2.67%	6.41	00:06:43
3. sjvcleanenergy.org / referral	29 (6.32%)	27 (7.87%)	30 (4.46%)	3.33%	1.33	00:00:19
4. SGVCOG / (not set)	15 (3.27%)	9 (2.62%)	30 (4.46%)	0.00%	1.80	00:00:34
5. m.facebook.com / referral	14 (3.05%)	14 (4.08%)	14 (2.08%)	14.29%	1.00	<00:00:01
6. bing / organic	10 (2.18%)	8 (2.33%)	10 (1.49%)	0.00%	6.30	00:11:49
7. hdenergypartners.com / referral	9 (1.96%)	8 (2.33%)	9 (1.34%)	11.11%	1.11	00:00:01
8. Google / search	8 (1.74%)	5 (1.46%)	11 (1.64%)	0.00%	4.27	00:04:01
9. facebook.com / referral	7 (1.53%)	7 (2.04%)	7 (1.04%)	28.57%	1.86	00:00:14
10. gatewaycog.org / referral	5 (1.09%)	3 (0.87%)	8 (1.19%)	0.00%	3.25	00:04:26

Referrals from SoCalREN’s regional partners played an important role and likely will continue to expand in 2021 and beyond.

The agencies identified in Table A-1 registered for the network toolkit in 2020.

Table A-1. Agency Registrations

Agency Name	Date Registered	Date Enrolled (if applicable)
Colton Joint Unified	2/20/2020	11/9/2020
Industry	5/20/2020	5/28/2020
San Gabriel	6/9/2020	7/2/2020
Seal Beach	6/9/2020	6/10/2020
Arcadia Unified	6/17/2020	
Pasadena	7/2/2020	
Woodland	7/14/2020	
Irwindale	7/21/2020	7/23/2020
Baldwin Park	7/23/2020	7/23/2020
June Lake Public Utilities District	8/17/2020	9/15/2020
Hilton Creek Community Service District	8/17/2020	9/10/2020
Torrance	9/11/2020	9/11/2020
Irvine Unified School District	9/11/2020	12/10/2020
Compton	9/15/2020	

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Agency Name	Date Registered	Date Enrolled (if applicable)
Eastern Sierra Community Services District	9/15/2020	9/30/2020
Redondo Beach Unified	9/15/2020	
Bell	9/15/2020	12/8/2020
Bishop	9/15/2020	10/28/2020
Lomita	9/18/2020	
Redondo Beach	9/18/2020	9/30/2020
Hawthorne	9/25/2020	10/2/2020
Westlake Village	11/5/2020	11/23/2020
Bradbury	11/6/2020	11/13/2020
Glendale	11/17/2020	
San Jacinto	11/23/2020	
Lake Forest	12/3/2020	1/13/2021
Artesia	12/4/2020	
South Gate	12/18/2020	

The following items were the top 10 most downloaded resources from the network toolkit:

1. Sample Social Media Posts (7 downloads)
2. Multifamily Outreach Materials (7)
3. Guidebook 6 – Post Project Implementation (6)
4. Peer-to-Peer Workshop: The Huntington Beach Experience (5)
5. Claremont Success Story (4)
6. Guidebook 5 – Project Management (4)
7. SoCalREN Member Badge (grey) (4)
8. Guidebook 1 – Identifying Energy Projects (3)
9. Energy Efficiency Incentive Programs: Evolving Policy, Requirements and Challenges (3)
10. Resiliency and Energy for Public Agencies (3)

## Capacity and Expertise

### Outreach Activities

2020 was an unprecedented year with many planned outreach activities canceled due to the COVID-19 pandemic. As a result, SoCalREN's engagement activities shifted to virtual engagement by launching a pilot webinar series: ***Conversations with SoCalREN***, which allowed the network to continue to collaborate and share knowledge by opening a space for conversations with agency Energy Champions. **The series began with 9 planned webinars and expanded to 12 as engagement**

remained high with each webinar. In 2020, SoCalREN also attended **one virtual conference (Municipal Green Building Conference + Expo)**, hosted **two speaking engagements/webinars with external partners (Association of California Water Agencies [ACWA] and Statewide Energy Efficiency Collaborative [SEEC])**, and hosted **10 outreach activities with our regional partners.**

**Table A-2. Outreach Activity Details**

Outreach Activities	Type
1.14.20 SJVCEO Regional Partnership Webinar	Regional Partner Outreach
4.15.20 Working Virtually with SoCalREN Webinar	Conversations with SoCalREN
5.6.20 Addressing Efficiency Through Uncertainty Webinar	Conversations with SoCalREN
5.18.20 SGVCOG SoCalREN Regional Partnerships & Public Sector Programs	Regional Partner Outreach
5.20.20 Introducing Energy Efficiency Resources & SoCalREN Programs	Regional Partner Outreach
5.27.20 Bringing Home the Savings Webinar	Conversations with SoCalREN
6.3.20 Our Energy Champions: Stories from the Field Webinar	Conversations with SoCalREN
6.17.20 It's a Virtual World: Remote Audit Services Webinar	Conversations with SoCalREN
6.17.20 SGVCOG SoCalREN Regional Partnerships & Public Sector Programs	Regional Partner Outreach
6.24.20 SBCCOG SoCalREN Regional Partnerships & Public Sector Programs	Regional Partner Outreach
6.24.20 Improving Schools During Closure: Upgrades for our Students, Teachers and Communities Webinar	Conversations with SoCalREN
7.8.20 Making the (Up)grade: SoCalREN Resources for the Water System SCADA Webinar (with ACWA)	Webinar
7.8.20 Introducing SoCalREN Public Sector Programs	Regional Partner Outreach
7.14.20 Introducing Energy Efficiency Resources & SoCalREN Programs	Regional Partner Outreach
7.15.20 Essential Facilities: Driving Water & Wastewater Projects Webinar	Conversations with SoCalREN
7.22.20 New Tools & Planning for Stimulus Funding Webinar	Conversations with SoCalREN
7.29.20 Funding & Financing Opportunities: A Critical Need Webinar	Conversations with SoCalREN
8.21 - 8.22.20 Municipal Green Building Conference & Expo	Event
8.26.20 Working with ESCOs 101 Webinar	Conversations with SoCalREN
9.16.20 Readyng Rural Water Operators and Systems for What's Ahead Webinar	Conversations with SoCalREN
10.15.20 Keeping the Focus Local: A conversation with SoCalREN Regional Partnerships (SEEC)	Webinar

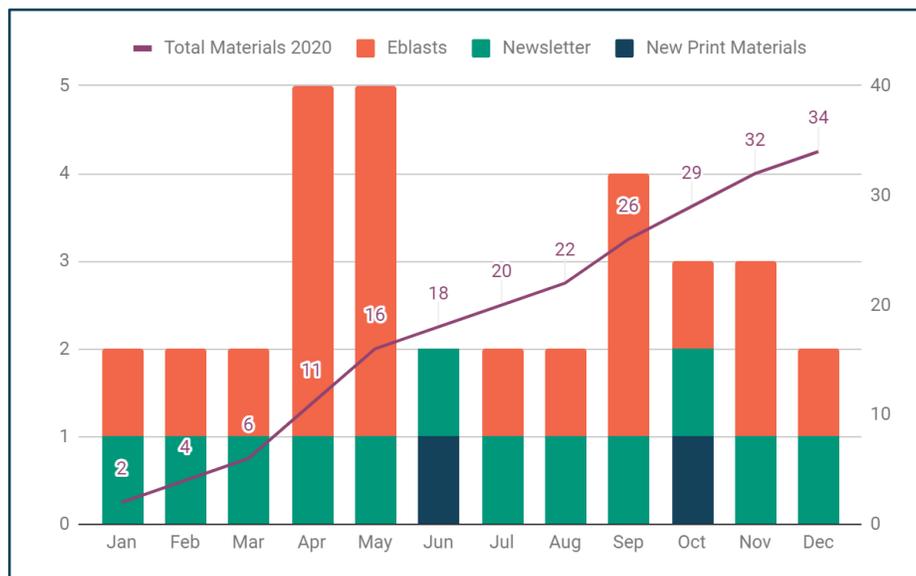
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Outreach Activities	Type
10.15.20 Capacity Building workshop 1	Regional Partner Outreach
10.23.20 Capacity Building workshop 2	Regional Partner Outreach
10.29.20 Capacity Building workshop 3	Regional Partner Outreach
12.8.20 Getting to Yes: Energy Efficiency Project Financing Webinar	Conversations with SoCalREN

### Unique Outreach Materials

SoCalREN develops unique outreach materials, including email marketing campaigns and printed materials, to provide informational and educational program materials to agencies. The SoCalREN Public Sector Programs developed 34 unique materials in 2020, as shown in Figure A-2.

**Figure A-2. Count of Unique Educational Materials**



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Figure A-3. Sample Collateral Developed

**Enhanced Benchmarking**  
Pathway to Zero  
SoCalREN Public Agency Programs | socialren.org

Through our Pathway to Zero Program, public agencies have access to specialized benchmarking services at no cost! Unlock greater energy efficiency opportunities and better understand your facilities' operational performance.

**Why Enhanced Benchmarking?**  
SoCalREN's enhanced benchmarking allows agencies to unlock comprehensive energy analysis beyond our standard portfolio energy analysis services.

SoCalREN's standard benchmarking uses ENERGY STAR Portfolio Manager® (ESPM), an online management tool that allows building owners and facility managers to track and assess energy use, such as continuous electric and gas facility consumption data, across their entire portfolio of buildings. SoCalREN will help your agency build a complete ESPM portfolio which equips your agency with the data it needs to confidently prioritize energy efficiency opportunities.

**What additional services does my agency receive?**

- **Custom facility energy use reports:** A comparison of energy use intensity (EUI) between facilities of different sizes, demonstrating how EUI has changed over time and comparing a facility's EUI with similar facilities within the agency and across other agencies.
- **On-site benchmarking:** SoCalREN sends a dedicated engineer to your facility to collect the necessary property and utility meter information to eliminate data gaps.
- **AB 802 benchmarking regulation fulfillment:** SoCalREN will ensure your agency is fulfilling AB 802 benchmarking regulations, a new requirement for select California facilities larger than 50,000 sq. ft.
- **ENERGY STAR certification support:** SoCalREN can help your facilities earn the verifiable ENERGY STAR stamp of approval to prove that your facilities are operating at maximum energy efficiency.

To access Pathway to Zero resources, your agency must serve a disadvantaged community. To confirm your eligibility, reach out to your Project Manager or access our facility search engine at [socialren.org/eligibility](https://socialren.org/eligibility).

For more info Visit [socialren.org/PathwaytoZero](https://socialren.org/PathwaytoZero) • Contact your Project Manager

**Revolving Savings Fund**  
SoCalREN Public Agency Programs | socialren.org

Apply for SoCalREN's 0% interest Revolving Savings Fund today!

**Benefits**

- ✓ **0% interest rate:** no interest payments over the life of the loan
- ✓ **Easy process:** a simple application, efficient processing, and allocation of funds within 2 months make Revolving Savings funding an easy "yes"
- ✓ **A proven model:** revolving funds have been used effectively nationwide, so you can rest assured this innovative approach is safe for your agency.
- ✓ **SoCalREN support:** the Revolving Savings Fund is part of a suite of customizable services, including project management, incentive application, procurement, and other support SoCalREN provides for enrolled agencies

**How it Works**

The SoCalREN Revolving Savings Fund (RSF) supports energy efficiency upgrades of public agency facilities by providing the financing your agency needs to make your project a reality. Loans can provide upfront construction financing to enable your project to move forward today, unlocking energy cost savings now. The repayment term for RSF is up to five years and for a limited time, the 1% service fee is waived for eligible agencies. Speak with a SoCalREN Project Manager to determine your eligibility.



- 1. Contact your SoCalREN Project Manager to determine if your project qualifies for RSF.
- 2. Submit your RSF application with SoCalREN support to receive formal approval and reserve funds.
- 3. Receive a loan offer letter and obtain governing board approval.
- 4. Receive funding following governing board approval and signing of loan agreement.
- 5. Install your energy efficiency project.
- 6. Obtain utility rebates/incentives and On-Bill Financing (OBF), if applicable.
- 7. Repay loan with one-time service fee so the cycle can continue!

Email us at [info@socialren.com](mailto:info@socialren.com) or visit [socialren.org/RSF](https://socialren.org/RSF) to get started!

## Email Campaigns

### Audiences

SoCalREN's mailing list currently has 1,409 subscribers (as of 1/14/2021). The primary contact (as listed in SoCalREN's customer relationship management system) for each enrolled agency is added to the mailing list, ensuring 100 percent of enrolled agencies receive educational materials and information about the Programs (Figure A-4). Additional subscribers are added from sign-ups at conferences and events and via the SoCalREN website.

Most receive their email on desktop computers, but a significant portion view our emails on-the-go. Figure A-5 identifies SoCalREN audience email clients in detail.

Figure A-4. Sample Email Campaign

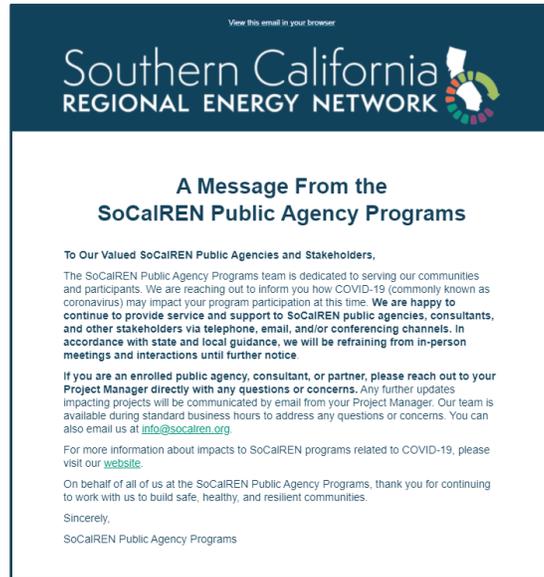
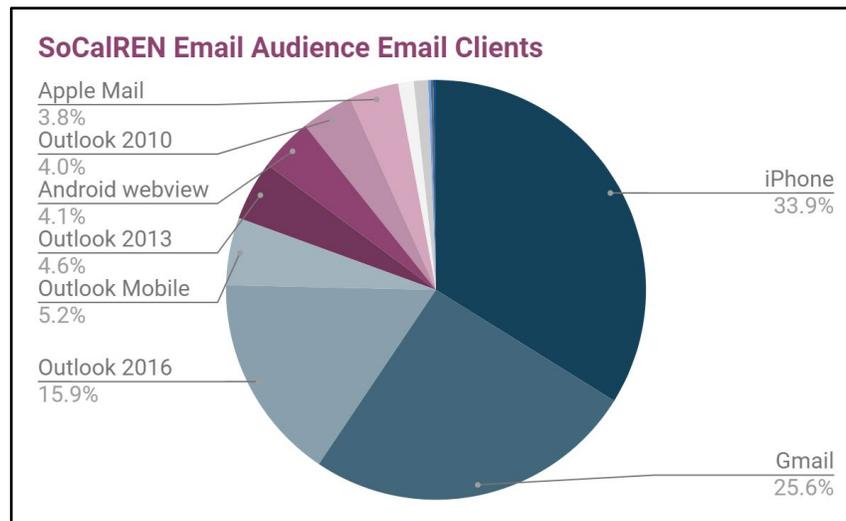
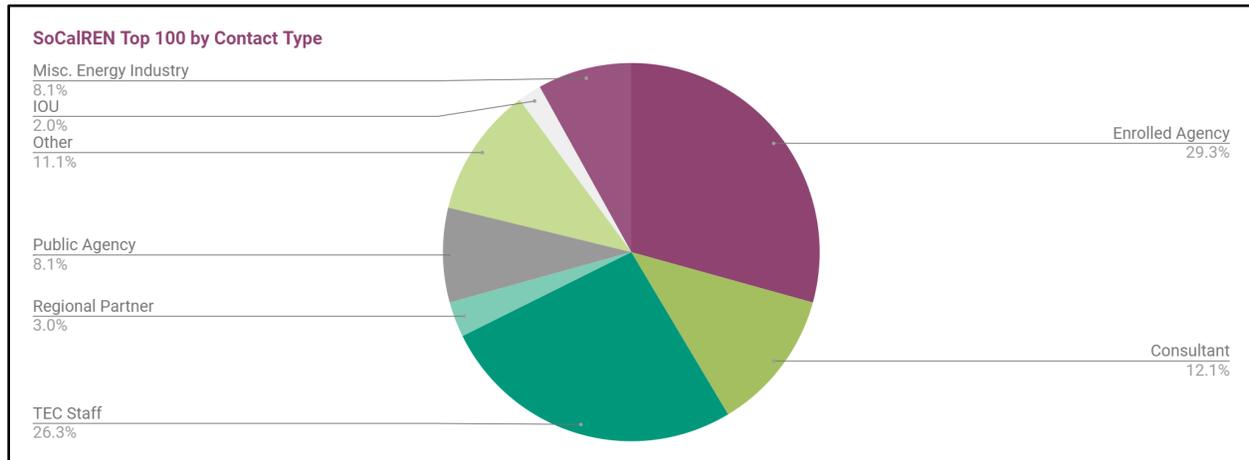


Figure A-5. SoCalREN Email Audience Email Clients



SoCalREN's top 100 audience members have opened/engaged with SoCalREN's email content at least 5 times. Contacts that engaged with SoCalREN the most were enrolled agencies and consultants. Figure A-6 shows the contact type details of the top 100 audience members.

Figure A-6. Top 100 Audience Members by Contact Type

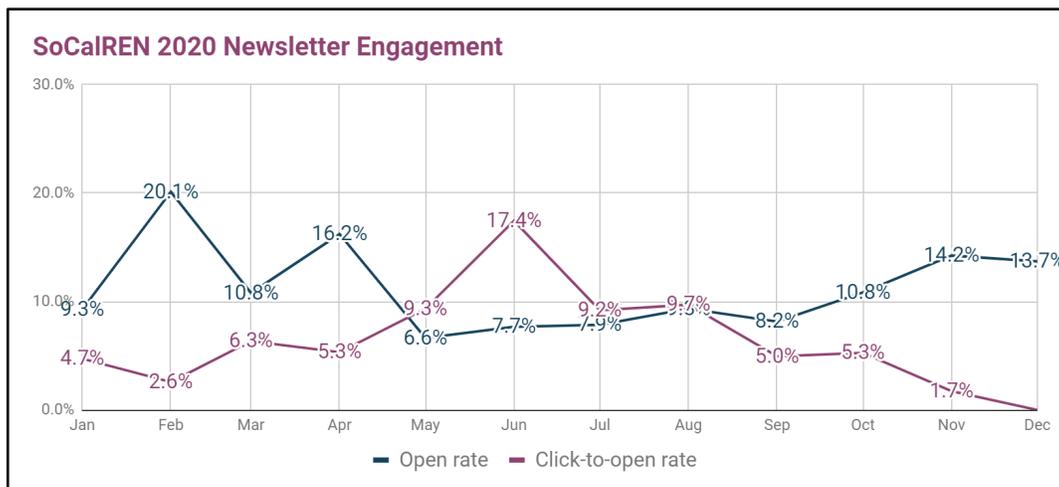


## Newsletters

SoCalREN distributed a monthly newsletter every month in 2020, typically distributed during the first week of the month. Newsletters focused on agency success stories, SoCalREN services, recent and upcoming events, financing opportunities, and relevant regulatory and legislative updates.

Figure A-7 showcases consistent open and click rate results for the newsletter, with the highest open rate at 20.1 percent and the highest click-to-open rate at 17.4 percent.

Figure A-7. Newsletter Engagement

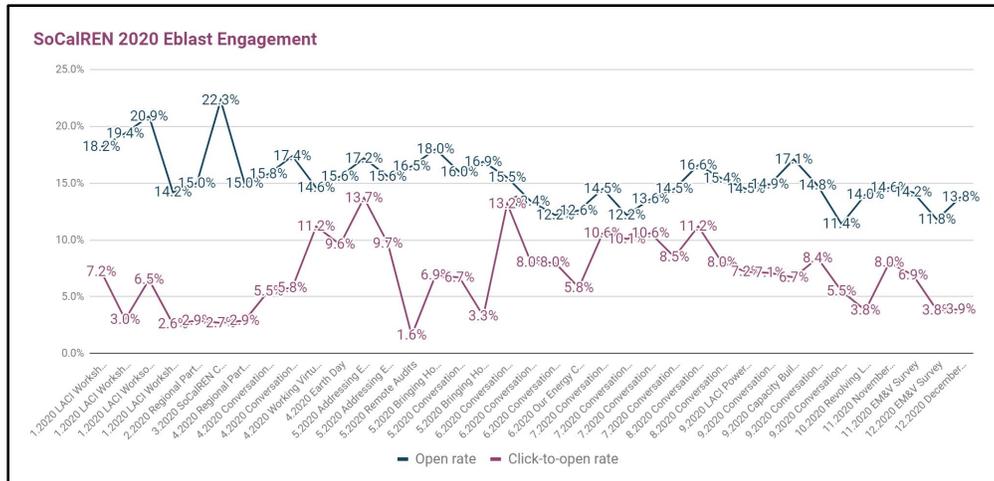


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## Eblasts

SoCalREN sent 37 eblasts throughout 2020. Figure A-8 showcases 2020 open and click rate results.

**Figure A-8. Eblast Engagement**



The top three 2020 subject lines by open rate were:

1. “SoCalREN Public Agency Programs COVID-19 Impacts and Updates” (22.3 percent)
2. “1/10 Electrification and Cleantech Networking Workshop for Public Agencies” (20.9 percent)
3. “Meet the Startups for our 1/30 Energy Efficiency and Cleantech Workshop!” (19.4 percent)

These relatively successful subject lines convey themes of giving agencies something or wanting to hear their voices. SoCalREN should continue to use variations of these themes when possible to encourage audiences to open emails.

Analysis of open and click rates shows there is not a significant dip in open and click rates when sending similar campaigns (e.g., reminder emails). In 2021, SoCalREN can feel confident continuing to send repetitive eblasts as needed.

## Social Media

In 2020, SoCalREN Public Sector Programs increased their social media presence on LinkedIn, Facebook, and Instagram, in addition to Twitter.

**Audience**

**Table A-3. Social Media Audience Sizes**

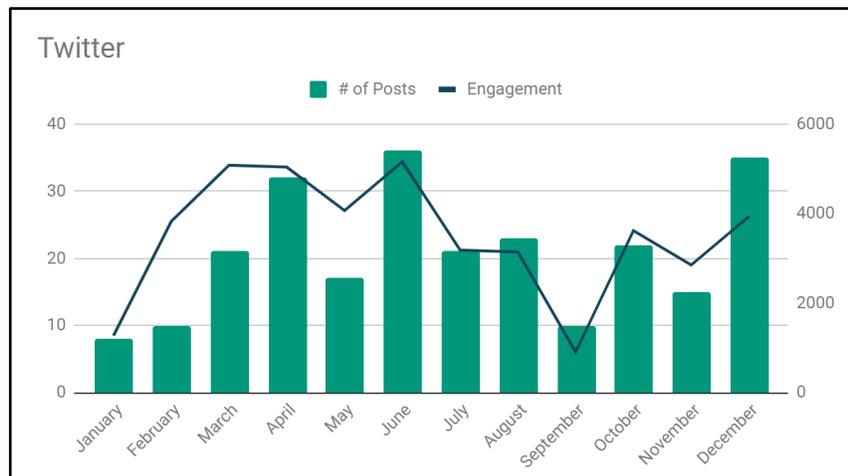
Platform	Number of Followers
Twitter	380
Facebook	9,853
LinkedIn	100
Instagram	102

**Engagement**

**Table A-4. Social Media Engagement**

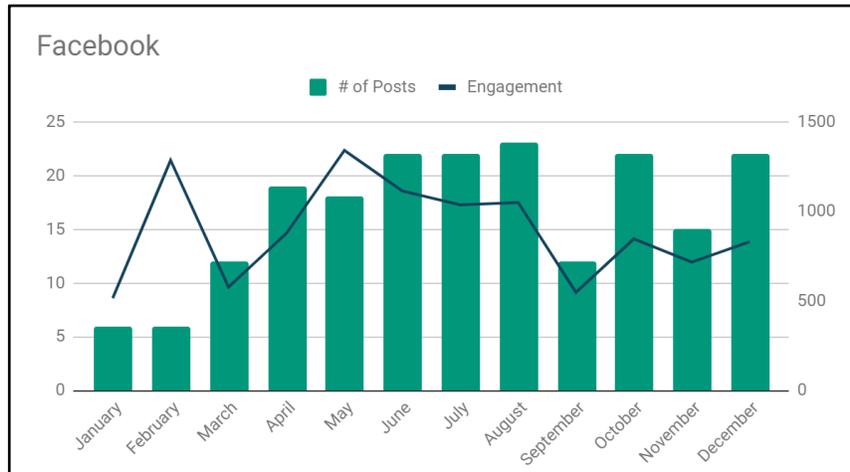
Platform	Number of Followers	Impressions
Twitter	250	42,060
Facebook	199	10,731
LinkedIn	141	6,228
Instagram	40	70
Total	630	59,098

**Figure A-9. Twitter Posts and Engagement by Month**

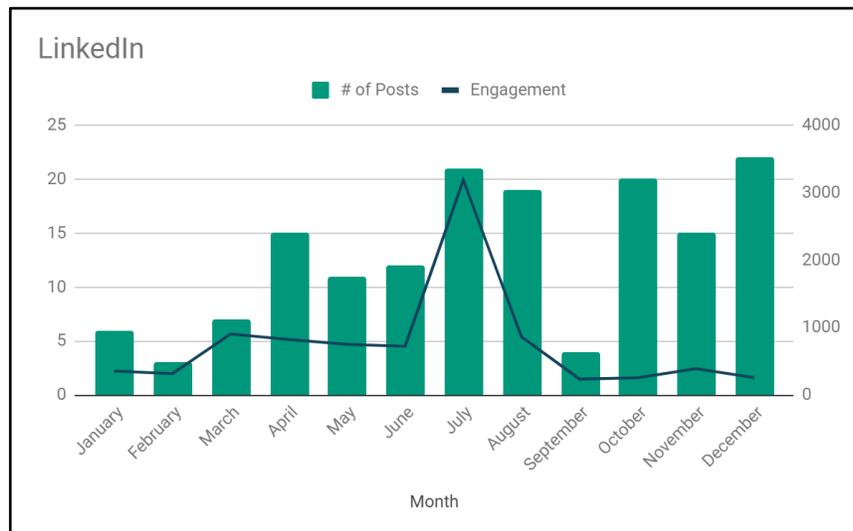


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**Figure A-10. Facebook Posts and Engagement by Month**

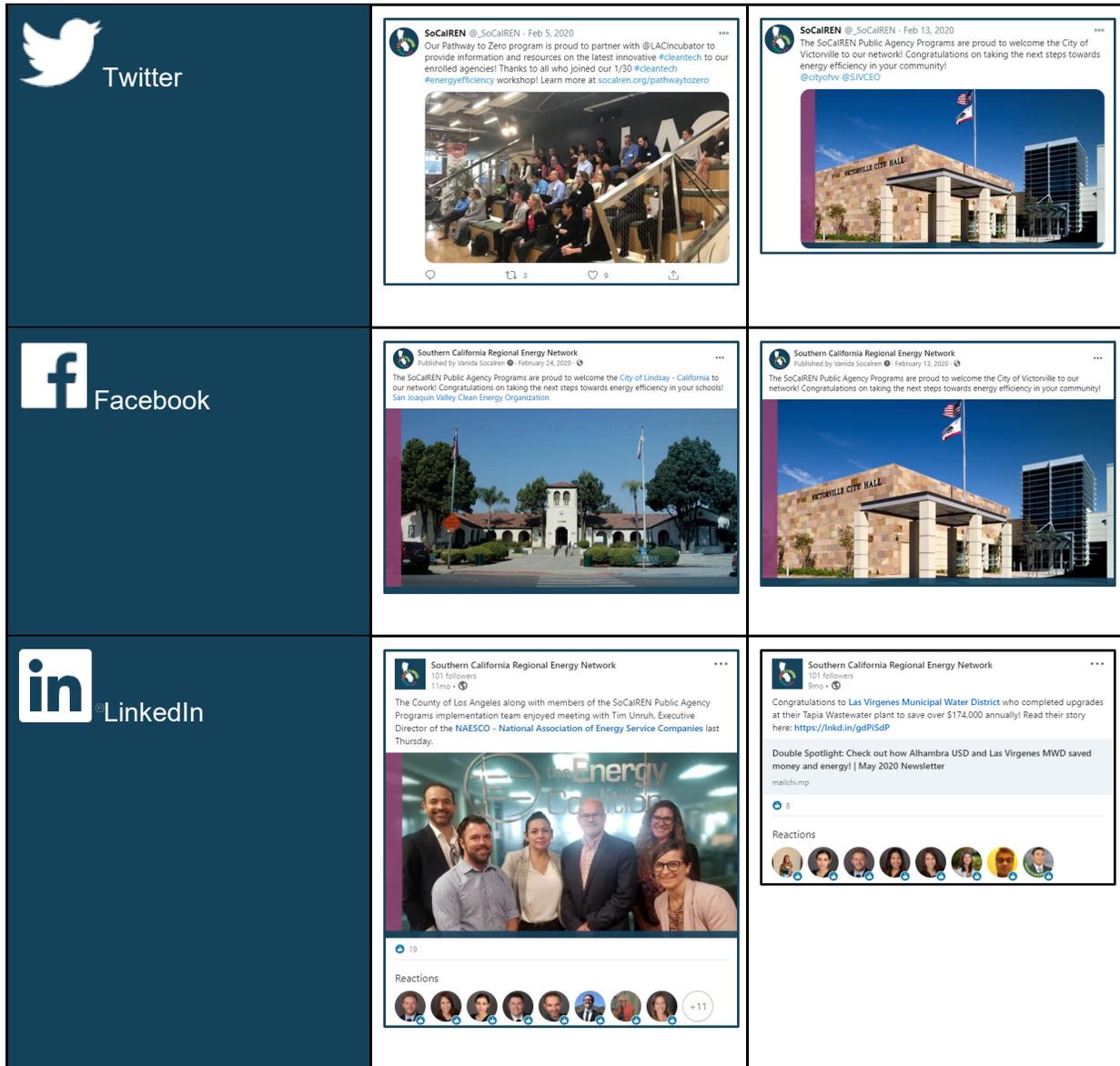


**Figure A-11. LinkedIn Posts and Engagement by Month**

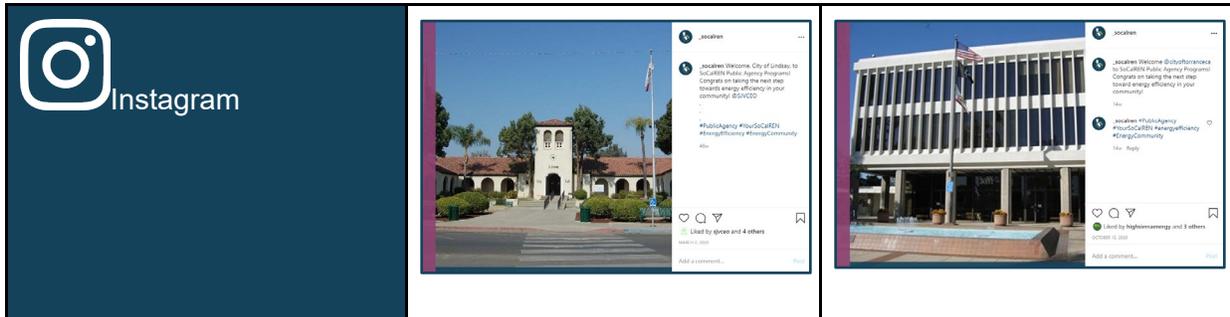


The SoCalREN Public Sector Programs had the top performing posts across all SoCalREN sectors, and the top two posts from each platform are shown in Figure A-12.

Figure A-12. Top Performing SoCalREN Social Media Content



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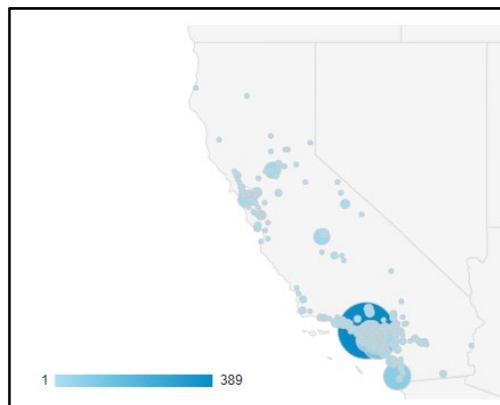
## Website

The Energy Coalition managed the Public Sector Programs pages of the SoCalREN website in 2020 and added several new features, including an online registration feature, an exclusive online library of resources for registered agencies, and a password-protected portal for SoCalREN Advisory Board members.

## Audiences

The majority of visitors (89.09 percent) to the public agency pages of the SoCalREN website come from the United States and 76.56 percent of those visitors come from California, with the remaining traffic spread across Washington, Wyoming, Virginia, Oregon, Texas, Florida, Iowa, and New York with less than 3 percent of users each. This is a slightly more diverse spread than in previous years, and may be due in part to the increase in virtual and remote work due to the COVID-19 pandemic. Figure A-13 shows California public agency page website users by location. This map indicates that most website users are in our target geographic area.

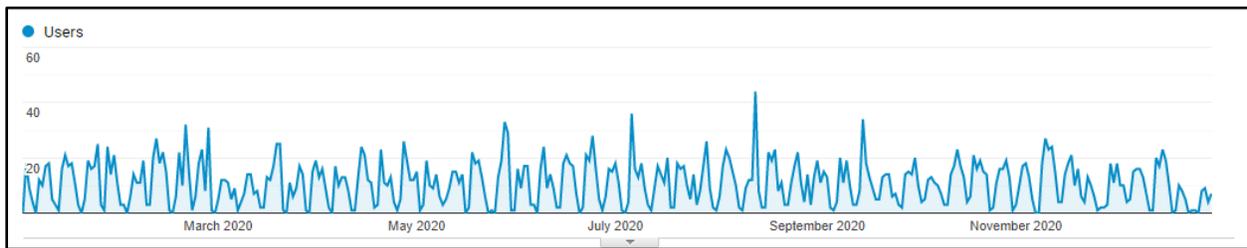
**Figure A-13. Map of SoCalREN Website User Locations**



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The number of users peaks during the week and drops dramatically during the weekend (see Figure A-14). Based on this cyclical nature, SoCalREN should continue to conduct testing and push updates live for public agency pages outside of normal business hours, when service interruptions are less likely to affect website users.

**Figure A-14. Daily Website Users**



Approximately 78 percent of visitors to the public agency pages of the SoCalREN website are new visitors. 83 percent of website visitors view the website on desktop browsers, 15 percent are on mobile platforms (a slight increase from 2019), and <2 percent view the public agency pages of the website on tablets. SoCalREN should continue to design webpages to be responsive to all devices.

## Customer Satisfaction

SoCalREN has an annual goal of achieving at least 80 percent customer satisfaction, measured via an annual satisfaction survey. The customer satisfaction survey was distributed in Q3 of 2020, achieving a 92 percent satisfaction rate (Table A-5); two testimonials from the survey are included below.

**Table A-5. Customer Satisfaction**

Customer Satisfaction	
Performance Target	Program Performance
80% Overall Satisfaction Rating	92% Overall Satisfaction Rating

**We are pleased with our partnership with SoCalREN! Not only have they helped the City identify energy efficiency projects, saving the City millions of dollars in energy costs, but [they] also have provided expertise and support with the City's effort in obtaining grant opportunities and recognition for our energy efficiency programs which has further enabled the City to accomplish Climate [Action] Plan goals."**

**-Kathy Wells, City of Palmdale**

**Being part of SoCalREN provides opportunities to decrease risk and increase value for all energy related projects at no additional costs. The ability to participate in these opportunities is consistent with the District’s mission to provide high quality, safe and reliable water and wastewater services, while practicing good stewardship of natural and financial resources.**

**-Michael Maestas, Cucamonga Valley Water District**

# Appendix B: Project Delivery Program Services Descriptions

## Project Management

A Project Manager is assigned to each agency to provide customized services that are either agency wide or project specific. Agency-wide support includes identifying projects through energy and benchmarking analysis across portfolios of buildings and infrastructure assets. Start-to-finish, project-specific support services include project development, coordination of technical services, financial analysis and financial services support, obtaining buy-in for projects, ensuring successful implementation of measures for any applicable incentives, and celebrating the success of implemented projects through case studies and webinars or workshops. Ensuring the appropriate level of project management support continues to be a key to the success of every project and the Program as a whole. The needs of every agency are served through this high-touch Program offering and the trusted Project Manager is seen as a reliable, impartial advisor.

## Audit/Engineering Calculations

The Project Delivery Program provides water/wastewater, lighting, mechanical, and whole building energy audits to help public agencies identify energy efficiency opportunities at their facilities. After discussing potential projects with the agency's assigned Project Manager, a qualified engineering consultant will conduct a targeted energy audit at the facility, providing project cost and energy savings estimates for identified energy efficiency measures.

## Objective Technical Review

The Project Delivery Program offers objective third-party expertise for reviewing technical performance specifications and providing guidance on energy efficient equipment selection when other parties have taken lead on project development. This service ensures successful implementation of measures and optimal energy savings for public agencies.

## Utility Incentive Application

The program will prepare and submit applications for any utility incentives available for each energy efficiency project, including leading the management of all related documentation and ensuring utility requirements are satisfied at project completion.

## Financial Analysis

The assigned Project Manager works with the agency to select the most cost-effective and desirable energy savings measures based on agency requirements and expected available budget. SoCalREN's comprehensive financial analysis includes key financial metrics such as a project's Net Present Value (NPV), Savings to Investment Ratio (SIR), and Simple Payback Period (SPP). The Agency also receives a project cash flow analysis covering the lifetime of the selected energy efficiency measures. The financial analysis evaluates eligible funding and financing options and helps the agency choose the best method for paying for the project.

## Financial Services

SoCalREN services help make the best use of agency funds by pursuing available external financing options including utility incentives, interest-free On-Bill Financing, the SoCalREN Revolving Savings Fund, external grants, and low-interest Energy Lease Financing through support services from PFM Financial Advisors LLC (PFM). Enrolled agencies also have access to PFM for financial advisory services.

## Procurement Support

SoCalREN customizes services to support the agency's preferred procurement approach. Tailored services begin with a procurement kick-off meeting to discuss and evaluate procurement options, align on construction phase roles and responsibilities, provide contract language support, and discuss other agency requirements to move the project forward. If the agency selects the simplified procurement path through Sourcewell, a joint scope walk meeting is scheduled that includes the selected contractor, subconsultant, agency representative, and TEC Project Manager to align on the project scope and design.

## Construction Phase Support

The program supports the project during the construction phase to ensure identified savings are realized, including a construction kickoff meeting and the distribution of the construction management roles and responsibilities.

## Energy Use Analysis

The SoCalREN Public Sector Programs empower agencies to make informed decisions about energy management through energy analysis services, including a Comparative Energy Analysis Report, ENERGY STAR Portfolio Manager assistance, and Green Button Data-powered insights. These tools analyze and compare agency-owned assets such as buildings and streetlights to identify opportunities for cost-saving energy efficiency projects.