

SoCalREN ANNUAL REPORT

2022
PROGRAM YEAR

SoCalREN 





Mammoth Lakes Mono County

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*Whittier Los Angeles County*

BACKGROUND INFORMATION

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

In D. 12–11–015 (2012), the California Public Utilities Commission (CPUC) authorized SoCalREN to:

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

SoCalREN has sought to deliver these results while conforming to guidance provided in R. 13–11–005, D. 15–10–028, and D. 18–05–041. In this report, we present the results of the programs offered by SoCalREN during the 2022 program year. All energy savings are recorded in the California Energy Data and Reporting System (CEDARS). Environmental impact equivalencies noted throughout were calculated using the U.S. Environmental Protection Agency’s Greenhouse Gas Equivalencies Calculator¹.

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



Santa Paula Ventura County

SOCALREN PORTFOLIO OVERVIEW

While continued inflation and general economic uncertainty were ever-present in 2022, the year also represented a monumental shift forward in funding climate action via the 2022 Inflation Reduction Act (IRA). The excitement around the potential impacts of IRA funding has further bolstered demand for EE and electrification among SoCalREN's target audiences. In addition to technical guidance and financial incentives for program participants, SoCalREN provided technical training and education to a wide range of businesses and workers to help grow the skilled workforce required to meet the current and future demand for both EE and electrification services. The transition to a clean energy future is happening now, with California helping to lead the way for the nation. SoCalREN is proud to be an effective part of this transition and progress in support of California's climate goals through measurable environmental and economic impacts.

Summary of 2022 Portfolio Performance

In 2022, SoCalREN's portfolio of programs achieved **18,061,418 kilowatt hours (kWh)** and **192,219 therms** of first-year energy savings. These savings equate to **13,818 metric tons of carbon dioxide equivalent (MTCO_{2e})** and provide approximate environmental equivalencies as displayed in Figure 1.

Figure 1. Portfolio-Wide Environmental Impacts



In addition to claimed and channeled energy savings impacts, SoCalREN programs delivered a variety of non-energy impacts as detailed in program summaries and the **Unique Value Metric Achievements** section of this report.

Sectors and Programs

The 2022 SoCalREN portfolio comprised four sectors and offered a total of eight programs to eligible customers. Activities conducted through each sector and program supported SoCalREN's core values: *Deliver Energy and Climate Impacts*, *Build Energy Capacity and Economic Resilience*, and *Expand Access to Energy Efficiency*. Programs delivered in 2022 are displayed in Figure 2.

Figure 2. SoCalREN Programs



Finance Sector

Note: SoCalREN's Finance Sector offering is delivered in conjunction with SoCalREN's Public Sector programs to increase efficiency and simplify agency participation.

Revolving Savings Fund

SoCalREN's Revolving Loan Fund, publicly known as the Revolving Savings Fund, provides up-front construction financing for energy projects at facilities utilizing SoCalREN's other services. The Revolving Savings Fund accelerates energy upgrades that would otherwise be delayed while they await budget allocation by providing cross-cutting, short-term, up-front construction financing for small-to-midsize projects at zero percent interest. Financing can be stand-alone or can be paired with other financing options such as on-bill financing (OBF), incentives, or California Energy Commission (CEC) loans. The Revolving Savings Fund is a catalyst for agency enrollment in SoCalREN and for project development that supports projects in underserved communities.

Figure 3. Revolving Savings Fund Results

Throughout 2022, the Revolving Savings Fund focused on management of agency participation, including development of new applications and loan agreements, tracking and coordination for repayments, and assessing potential opportunities for waitlisted and newly interested agencies. By the end of 2022, \$1,990,000 in Revolving Saving Fund loans were disbursed to two public agencies. One public agency also received its offer to finance, accepted, and executed their loan agreement, with \$91,806 in funds pending disbursement in quarter one of 2023. SoCalREN also developed an additional pipeline public agency project totaling \$544,200.

Public Sector

In 2022, SoCalREN's Public Sector energy efficiency (EE) programs achieved 12,686,307 kWh of first-year energy savings. With SoCalREN's support, enrolled agencies reduced ongoing monthly energy costs at a time when they were hit hard by the long-term financial impacts of the COVID-19 pandemic and high rates of inflation. These electric and gas energy savings translate into positive environmental impacts by eliminating more than 9,000 MTCO_{2e}—the equivalent of removing approximately 2,000 cars from the road or the equivalent of more than 1,700 homes' annual electric consumption. The retrofit and upgrade projects stimulated through these programs supported nearly 160 construction jobs across Southern California. In 2022, nearly 90 percent of participating agencies report overall satisfaction with SoCalREN and the services it provides.

CalREN Coordination

Expanding on the collaborative spirit that has defined the growth of the RENs over the past ten years, the CalREN Coordination Group was formed. Established during a July 2022 REN Planning Group meeting in San Diego, CalREN facilitates a structured, strategic collaboration and communication process with the goal of elevating the RENs to harness their collective voice as key administrators of energy programs in California. Membership includes the four authorized RENs (i.e., BayREN, 3CREN, SoCalREN, and I-REN) as well as the proposed Rural REN. Seven CalREN Coordination Group meetings were held in 2022, and five additional ad hoc meetings were scheduled among all RENs to collaborate on specific topics.

Overview of Public Sector Performance

SoCalREN’s public sector services are available to public agencies in any region served by Southern California Edison (SCE) or Southern California Gas Company (SoCalGas®). The service territory is a geographically, socially, and economically diverse area encompassing all or part of 13 counties: Imperial, Inyo, Kern, Kings, Los Angeles, Mono, Orange, Riverside, San Bernardino, San Luis Obispo, Santa Barbara, Tulare, and Ventura. 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 and public charter schools
- Water/wastewater agencies/districts
- Other public agencies (non-state and non-federal)

Figure 4. Cumulative Public Agency Enrollments



In 2022, SoCalREN offered three continuing public sector programs: The **Energy Efficiency Project Delivery Program (EE PDP)**, **Pathway to Zero (P2Z)**, and the **Metered Savings Program (MSP)** as well as a new program, **Streamlined Savings Pathway (SSP)**. Participating SoCalREN agencies completed 59 projects in 2022, achieving **12,686,307** annual kWh savings and **107,669** annual therms savings². SoCalREN also identified **18,553,460 million kWh** and **149,922 therms** of potential savings pipeline for future years³. Figure 5 shows the public sector program’s 2022 achievements and how they align with SoCalREN’s unique values.

²Gross savings figures noted; savings are delivered through non-resource programs. Final numbers may change based on final savings reported by SCE and SoCalGas.

³Project pipeline values are reported with confidence factors applied depending on the status of the project to account for attrition of early projects and minimize over-reporting.

Figure 5. SoCalREN's Unique Value for the Public Sector

Delivering Climate and Energy Impacts



12,686,307 kWh

kWh Savings, 11,133,558 in Underserved Communities



1,594 kW

kW Savings, 1,413 in Underserved Communities



107,669 therms

Therms Savings, 107,731 in Underserved Communities



9,561 MTCO₂e

GHG Reduction, 8,460 in Underserved Communities

Building Energy Capacity and Economic Resilience



\$2,463,676

in Energy Bill Savings

\$2,463,930

in Incentives

\$201,294

in OBF Reserved



59

Completed Projects

~160

Jobs Supported



44

Unique Outreach Materials

13

New Agencies Enrolled

25

Outreach Events

Expanding Access to Energy Efficiency



6

New Underserved Agencies Enrolled in 2022



49

Completed Projects in Underserved Communities in 2022



14

Pathway to Zero Reports Delivered to DACs



5

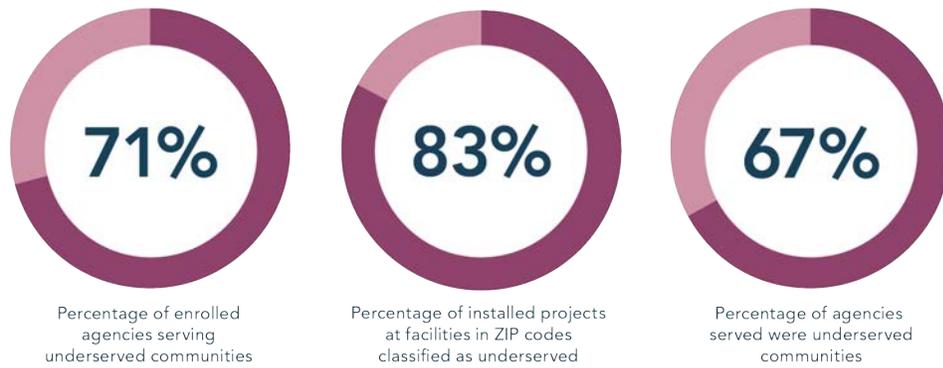
Regional Partners

The SoCalREN public sector programs prioritize support to underserved communities. In 2022, more than 70 percent of enrolled agencies served rural, very low-income, and disadvantaged communities (DACs), 83 percent of installed projects were at facilities in underserved ZIP codes, and over 65 percent of agencies served were underserved communities.

“SoCalREN staff are always organized, helpful and understanding of the challenges public agencies face. The programs have helped us identify our weak spots and focus our team’s attention where it’s needed most.”

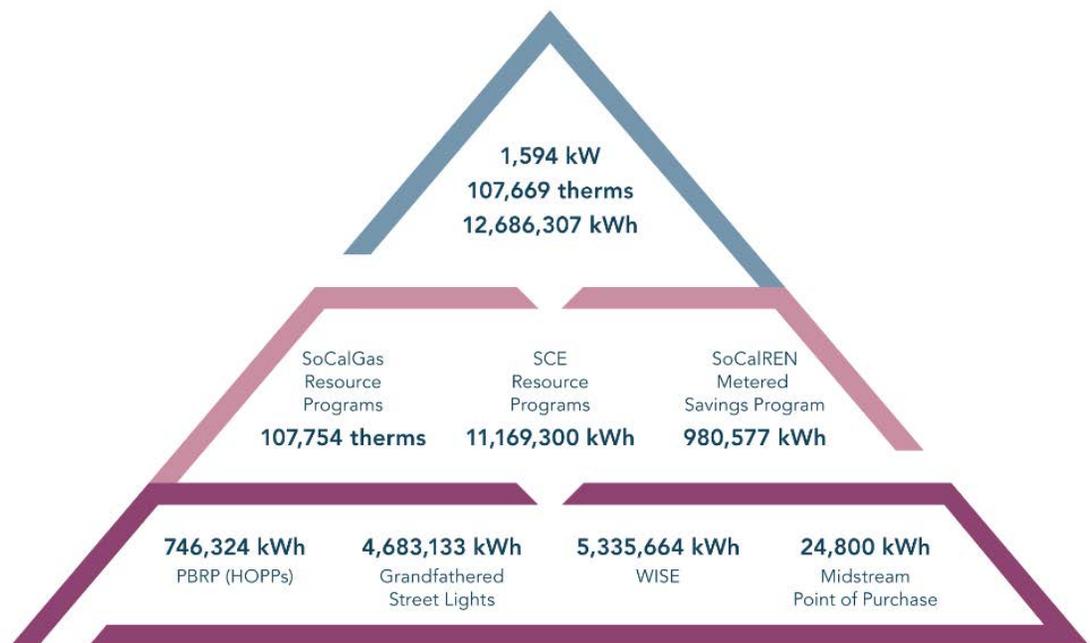
City of Goleta

Figure 6. Underserved Public Agency Support



SoCalREN recognizes the importance of contributing to real and persistent energy savings to help California meet its climate goals, energy goals, and resource planning needs. Because EE PDP and Pathway to Zero are Market Support sector and Equity sector programs respectively, SoCalREN channels projects through these programs into existing Resource Acquisition programs wherever possible to ensure concrete impacts and savings are achieved and recognized. In 2022, SoCalREN Public Sector programs channeled savings to SCE, SoCalGas, and SoCalREN’s EE Resource Acquisition sector programs as depicted in the figure below.

Figure 7. SoCalREN Public Sector Contributions to Resource Acquisition Programs



The SoCalREN public sector programs launched new strategies in 2022 to address specific challenges, including:

- A new resource program, Streamlined Savings Pathway, to fill gaps left in IOU and third-party programs;
- Incentives for Metered Savings Program to support the cost of EE project implementation;
- Enhanced local support provided through Regional Partners, with the evaluation of potential EE and resilience project opportunities for agency-owned sites and residents' homes;
- Enhanced coordination with third-party programs to ensure public agencies are informed of all applicable resources and to simplify the process of participating in multiple programs;
- Integrated WE&T sector offerings on upcoming public agency projects and solicitations to ensure local, disadvantaged workforce is included in the procurement process; and,
- Managed constrained program resources by limiting audits an agency can receive and created an enrollment waitlist for agencies without projects at-the-ready.

Public Sector Optimization/Outlook

In 2023, the Public Sector will continue to optimize its portfolio to fill market gaps and overcome barriers using the following tactics:

- Offer EE measure incentives through the Metered Savings Program and the Streamlined Savings Pathway to fill market gaps and offer agencies comprehensive yet simplified opportunities for energy savings;
- Optimize the Metered Savings Program and Streamlined Savings Pathway incentive structure to utilize ratepayer funds to maximize grid benefits;
- Launch a Decarbonization through Electrification outreach and engagement series to help public agencies and the communities they represent identify and fund opportunities to save energy and reduce carbon emissions;
- Continue to focus on equity by offering enhanced incentives for projects in underserved areas, including low-income and hard-to-reach communities;
- Continue coordinating with stakeholders to understand the continued impacts of COVID-19 and inflation-related challenges. SoCalREN can then identify avenues or opportunities to better manage project pipeline expectations;
- Focus on expanding program reach by engaging and enrolling new agencies across the SoCalREN territory;
- Third-party coordination task force to align with implementers on new program offerings and data sharing strategies, inform customers about new offerings, and streamline the process for customers participating in multiple programs; and,
- Track new state and federal energy efficiency, electrification and resilience funding opportunities for public agencies and promote them through SoCalREN's communications channels.

"SoCalREN streamlined the planning, engineering, and project implementation [which] has greatly reduced the time needed to complete projects."

Las Virgenes Municipal Water District

Residential Sector

SoCalREN's Residential Sector helps make energy efficiency more accessible throughout the areas served by SCE and SoCalGas, with an emphasis on reaching residences in underserved and disadvantaged communities. Through a targeted focus on multifamily complexes and elementary school students, each measure installed—at no cost to residents—delivers impacts to entire households.

Figure 8. Residential Sector Highlights



Multifamily Program

SoCalREN offers a Multifamily Program to property owners in its territory, providing comprehensive solutions and financial incentives (including higher incentives for DAC/HTR customers) that motivate program participants to maximize energy savings.

In 2022, SoCalREN delivered 5,375,111 net kWh and 75,123 net therms savings through its Multifamily Program. More than 16,500 tenant units across 79 properties were impacted by EE improvements. Many projects included electrification measures, furthering progress toward California's decarbonization goals. Most importantly, approximately half of the SoCalREN Multifamily Program projects completed in 2022 were in DACs, furthering SoCalREN's mission to promote energy equity and environmental justice.

In 2023, the program will continue to seek to leverage external funding sources to expand what can be offered to properties during the visits related to the SoCalREN program. In particular, the program would like to support the installation of additional decarbonization measures through its participating contractors. Scheduling property upgrades is a complicated activity for property owners, so the greater the impact that can be made during already-planned site visits, the better. The program will coordinate with the Public and WE&T Sectors to recruit and train EE contractors who can provide services to customers throughout the region, with an increased focus on fuel switching measures.

Kits for Kids

Fuzzy the Energy Monster and his friends had another successful year! Marking its second year as a Residential Sector offering delivered through public schools, Kits for Kids once again achieved its participation goals, enrolling 250 classrooms and serving more than 5,700 students in 2022. The program also achieved nearly 10,000 in net therms savings.

Figure 9. Characters from SoCalREN's Online Scavenger Hunt Game



Kits for Kids provides energy-saving measures to households with third or fourth grade students attending eligible public schools. Kits featuring energy-saving measures and educational materials are provided for each student in each participating classroom. In addition, students gain access to an online scavenger hunt that helps them learn more about how to save energy in their homes. The program features cartoon “Energy Monsters” (see Figure 9) who help students learn about energy efficiency. Teachers provide a key role in the program—not just as educators sharing the lessons and information, but as program participants. Their support is vital in gaining access to installation verification from students and their families. Classrooms that verify a minimum of 65 percent of students completed the energy-saving installations and activities are awarded a \$1,000 grant to purchase instructional materials. The 2023 program year will focus efforts on increasing participation by schools located in DACs.

Workforce Education and Training Sector

The SoCalREN Workforce Education and Training (WE&T) Sector continues to contribute to the development of the skilled workforce needed to achieve the growing demands of California’s energy efficiency market. SoCalREN’s WE&T services encompass a wide range of offerings from mentoring high school STEM students to providing training, technical assistance, and support to small and diverse businesses to help them participate in the clean energy economy. Collaborations with academic institutions, community-based groups, and other partners help expand the program’s reach and impact. SoCalREN’s WE&T sector is continuously helping to build a skilled and diverse workforce that can assist in the transition to a more sustainable and resilient region. During 2022, SoCalREN’s WE&T Sector impacted more than 500 participating individuals.

“I was motivated by ACES to learn SolidWorks and work on certifications that might make a real impact in my future.”

UC Davis Aerospace Science and Engineering student who completed participation in SoCalREN’s ACES Pathway Program

SoCalREN 2022 Portfolio Marketing

SoCalREN's 2022 marketing outlook and activities were conducted in support of individual program goals and the overall REN-wide vision to help communities actively shape a safe, secure, resilient, and affordable clean energy future.

Various strategies were prioritized throughout the year to ensure the primary objectives were delivered. The first strategy includes strengthening awareness of SoCalREN programs, resources, events, and positive customer experience stories. An additional strategy included increasing participation in SoCalREN programs through engagement, advertising, participation, and feedback. A final strategy revolved around fostering community among audiences to drive enthusiasm about SoCalREN programs. Key tactics employed to complete the activities associated with these strategies are detailed and examples are provided below.

Quarterly Newsletters

SoCalREN's Quarterly Newsletters provide an ample opportunity to highlight sector achievements and illustrate significant information on SoCalREN to its audience. In 2022, SoCalREN disseminated four quarterly newsletters throughout the year. Newsletters support SoCalREN's outreach efforts to garner awareness and assist in building a recognizable brand.

Figure 10. SoCalREN Quarterly Newsletter



Website, Social Media, and PR

SoCalREN’s website received 70,620 total pageviews from 16,669 unique users during 25,368 sessions. Data related to site visits by sector is displayed below in Table 1.

Table 1. 2022 Sector Website Data

| Sector | Pageviews | | | |
|----------------|-----------|-------|-------|-------|
| | Q1 | Q2 | Q3 | Q4 |
| Public/Finance | 2,085 | 2,236 | 3,370 | 1,749 |
| Residential | 3,467 | 3,216 | 3,366 | 3,653 |
| WE&T | 1,100 | 1,929 | 2,276 | 1,192 |

Traffic to the website came primarily from organic search, social media (example post displayed in Figure 11), and direct referrals, including referrals from press releases SoCalREN distributed to promote its offerings (example displayed in Figure 12).

Figure 11. Sample SoCalREN Social Media Post



Figure 12. SoCalREN Press Release



Events and Marketing Collateral

Figure 13. SoCalREN Overview Flyer

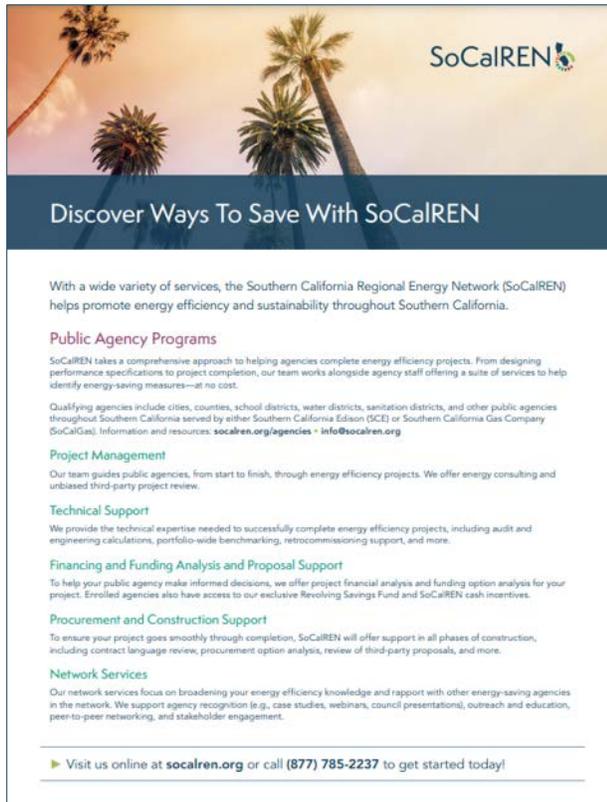


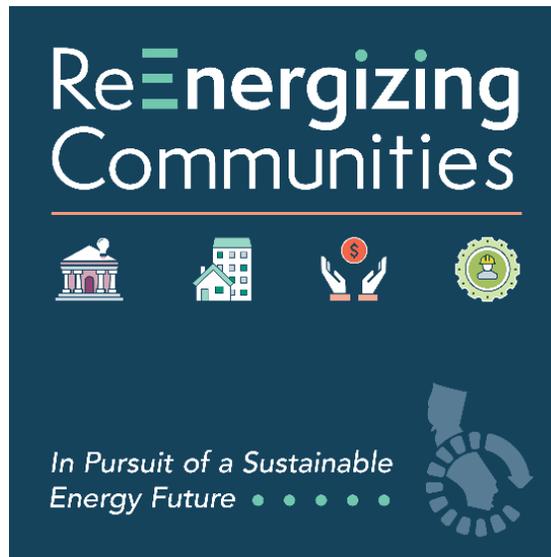
Figure 14. SoCalREN Sponsorship Ad at Net Zero 2022



ReEnergizing Communities Podcast

The ReEnergizing Communities podcast 2022 season featured an incredible slate of leaders across Southern California who are working to create a better energy future. These conversations were captured in several episodes, giving listeners access to innovative perspectives on influencing change at home, at work, and in the community.

Figure 15. SoCalREN Podcast Logo



In 2022, ReEnergizing Communities released seven episodes with the following guests:

- **Episode 7:** SGVCOG and their Partnership with SoCalREN
 - [San Gabriel Valley Council of Government's Executive Director, Marisa Creter](#) discusses how SGVCOG are leveraging local knowledge and strong relationships with SoCalREN's various Programs, to bring energy efficiency offerings to San Gabriel Valley communities.
- **Episode 8:** Utility Debt Relief and Energy Justice with Strategic Concepts in Organizing and Policy Education (SCOPE)
 - [SCOPE's Executive Director Gloria Medina and member Peggy Scott from](#) give a detailed overview of the work SCOPE is doing to help bring debt relief and energy justice to the communities they serve.
- **Episode 9:** The City of West Hollywood—A SoCalREN Public Agency Veteran
 - [City of West Hollywood Long Range Planning and Sustainability Manager, Robyn Eason, and Senior Administrative Analyst, Erin Hamant,](#) discuss how they are bringing energy resilience to West Hollywood.
- **Episode 10:** USGBC-LA's Ben Stapleton on Sustainability in LA
 - [US Green Building Council Los Angeles \(USGBC-LA\) Executive Director, Ben Stapleton,](#) discusses ways to create a more sustainable future for Southern California, starting with LA schools and businesses.

- **Episode 11:** Cool Irvine—Irvine's Campaign to Reach Carbon Neutrality by 2030.
 - [Cool Irvine's Environmental Programs Administrator, Sona Coffee](#), discusses how their Cool Block program is creating planet friendly, disaster resilient, and community rich neighborhoods, in an effort to reach carbon neutrality by 2030.
- **Episode 12:** Los Angeles Alliance for a New Economy (LAANE): Activism in Local Communities with RePower LA
 - [Los Angeles Alliance for a New Economy's \(LAANE\) Community Organizer, Kameron Hurt](#), discusses activism in local communities with RePower LA.
- **Episode 13:** The Greenlining Institute: Environmental Justice for Communities of Color
 - [The Greenlining Institute's](#), Alvaro Sanchez, discusses Environmental Justice for Communities of Color. Alvaro shares how the Greenlining Institute is committed to building a just economy that is inclusive, cooperative, sustainable, participatory, fair, and healthy.

SoCalREN's First Ten Years: A Look Back



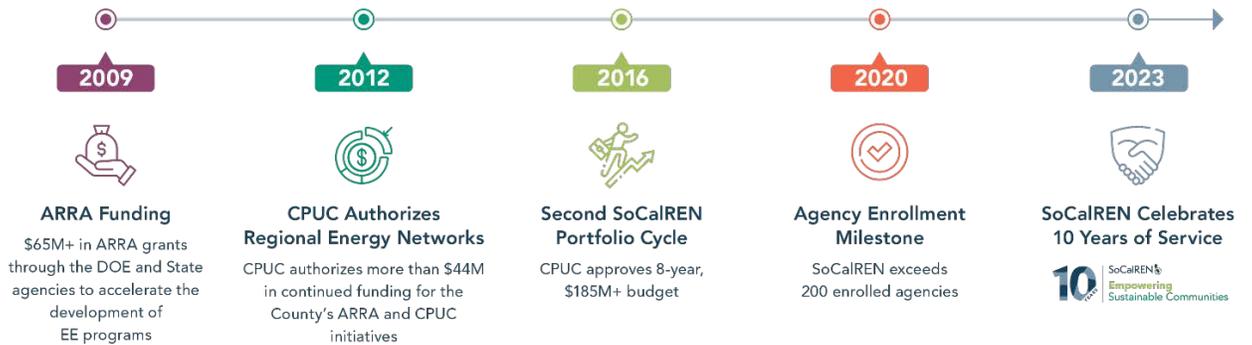
The success of California's Regional Energy Networks provides a shining example of how federal, state, and local governments can work in harmony to drive equitable environmental progress for communities. Approximate impacts from SoCalREN's programs during the first decade of implementation are displayed below in Figure 16.

Figure 16. SoCalREN's First Ten Years



SoCalREN's seeds were planted nearly 15 years ago, when the County of Los Angeles was awarded more than \$65M in American Reinvestment and Recovery Act (ARRA) grants through the U.S. Department of Energy (DOE) and California state agencies to develop and expand energy efficiency initiatives, with a focus on delivering technical advisory services to communities and local government.

Three years later, in 2012, CPUC authorized the establishment of Regional Energy Networks to increase access to energy efficiency and fill gaps in services offered to ratepayers. The \$44M CPUC award allowed the County to expand its offering, create a brand and market presence through the Energy Efficiency Project Delivery Program, and secure EE services for more communities.

Figure 17. SoCalREN: Beginnings through Today

When the CPUC approved SoCalREN's second eight-year portfolio budget of more than \$185M in 2016, rapid growth and expansion occurred. The Public sector developed and launched three additional programs giving public agencies access to NMEC, DER, and financing services. This support proved critical to area agencies during the portfolio cycle, as IOU programs faced increased uncertainty and agencies faced a variety of challenges—staffing shortages, budgetary restraints, and COVID-related issues, among others. SoCalREN's Public Sector programs allowed vital energy conservation projects to move forward, saving communities money and driving climate action at the local level. More than 210 agencies are enrolled in SoCalREN today, including cities, counties, school districts, and other special districts. Agencies consistently report over 95% satisfaction with SoCalREN's services, and many have continued to participate over the entire decade, completing multiple projects and making energy efficiency an ongoing part of planning activities.

During the second portfolio cycle, SoCalREN strengthened its services to offer a Workforce Education and Training (WE&T) program focused on mentoring and supporting diverse contractors in the EE industry. The sector was later expanded to include services targeting disadvantaged youth; the ACES Pathway Program, Green Path Careers, and the Future Green Leaders Summit have collectively impacted more than 10,000 students and opportunity youth with guidance about clean energy careers, educational and college course opportunities, paid internships, and industry certifications that lead to careers.

Through the Residential sector launched during the second cycle, SoCalREN worked in partnership with the statewide Energy Upgrade California Home Upgrade program to deliver over \$4M in incentives to single-family homeowners and multifamily property owners. In 2017, SoCalREN refined its Residential offering to focus solely on the multifamily sub-sector, maximizing reach and the number of households impacted. During the pandemic, SoCalREN developed a no-contact Comprehensive Common Area offering that allowed projects to continue safely even during shutdowns. The pandemic shutdowns also inspired the development and launch of Kits for Kids. To date, SoCalREN's Residential sector has saved ratepayers nearly 30 net GWh and over 1.2M therms.

Portfolio Optimization and 2023 Outlook

SoCalREN will help communities—particularly vulnerable and underserved communities—fully participate in the clean energy economy, creating jobs and ensuring energy resiliency for the future. Planned 2023 portfolio strategies will drive the development and implementation of innovative program offerings that respond to market needs and support our core values.

SoCalREN will also place emphasis on obtaining additional outside funding sources (including grant funding through IIJA and IRA, as well as state programs) to bolster and expand the types of clean energy solutions available to customers in support of California’s urgent need to reduce demand and usage of energy.



Temecula Riverside County

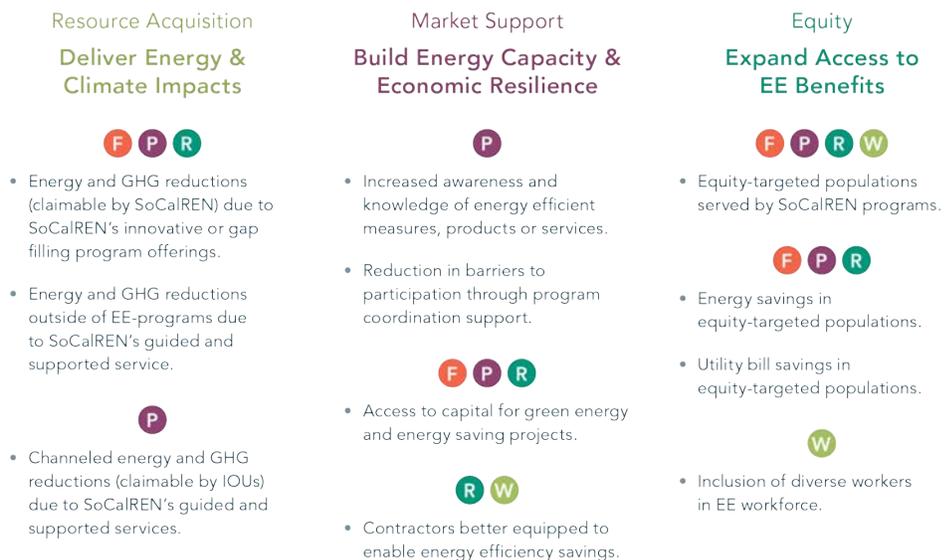
UNIQUE VALUE METRICS

SoCalREN’s programs support a set of core values that align with the three primary CPUC program segments. Unique value metrics (UVMs) measure progress toward a set of stated goals that are designed to support these core values.

SoCalREN’s Unique Value

The value metrics assessed in this document are the quantifiable measurements of activities that demonstrate SoCalREN’s impacts. Each metric speaks directly to the value that SoCalREN provides to the State and the communities it serves.

Figure 18. SoCalREN’s Unique Value by Segment and Sector



F Finance
 P Public Agencies
 R Residential
 W Workforce Education & Training

2022 UVM Accomplishments and Results

Many UVMs focus on driving environmental equity through DAC and HTR participation, which is a primary goal of SoCalREN. Initial 2022 UVM data is reported along with detailed information about proposed UVM targets for 2024 through 2027. A detailed review of UVMs and future targets is included in Appendix A. An overall summary of SoCalREN's 2022 UVM impacts is provided below.

Table 2. UVM Achievements in 2022

| Sector | Metric | 2022 Achievement |
|----------------|--|------------------|
| Portfolio-Wide | Final portfolio kWh | 18,061,418 |
| Portfolio-Wide | Final portfolio Therms | 192,219 |
| Portfolio-Wide | Final portfolio GHG from kWh | 12,800 |
| Portfolio-Wide | Final portfolio GHG from Therms | 1,018 |
| Public | Projects constructed and completed | 59 |
| Residential | Disadvantaged multifamily properties served | 39 |
| Residential | Tenant units served | 16,623 |
| Residential | Incentives paid in DAC (including Rural/HTR) | \$2,950,634 |
| Residential | Total project costs in DAC | \$12,560,099 |
| Residential | Total project costs in Rural/HTR | \$9,694,118 |
| WE&T | Student internships | 30 |
| WE&T | Total participants | 500+ |
| WE&T | Opportunity youth career plans | 6 |
| WE&T | Partners (e.g., educational institutions, employers) | 39 |

Total Community Benefit (TCB) Proposal

During 2022, SoCalREN prioritized coordinating with the other RENs to develop a summary metric for REN benefits. SoCalREN proposed the concept of a TCB which would be the summation of quantifiable community benefits expressed in a single dollar value. TCB would capture various benefits including Total System Benefit (TSB) and other quantifiable benefits to the community beyond resource EE savings such as the value of jobs created by WE&T, lifetime customer bill savings, and other net energy benefits (NEBs) that would be based on outcome results from EE programs.

While the full value of a REN cannot yet be captured as a monetized value and thus should not be the current REN performance metric, SoCalREN supports the ongoing discussions about how RENs might create a single monetized value from REN activities that captures the values that RENs provide to their communities. SoCalREN provided the information displayed in Figure 19 **Error! Reference source not found.** below to summarize the previously discussed values that could be monetized. The line items

shown in the table could be used by the RENs and the Commission as a starting point for future discussions. SoCalREN looks forward to continued discussions in 2023.

Figure 19. Total Community Benefit (TCB) Proposal Information

| Monetized Value from REN | Monetized values created by the RENs |
|---|---|
| Environmental Benefits to Communities (REN and others) | |
| TSB savings | \$x.xx |
| Social Benefits to REN Communities | |
| Lifetime Bill savings | \$x.xx |
| [RENs would continue to add as numbers become available] | \$x.xx |
| Monetized Value from REN | |
| Economic Benefits for those in REN Communities | |
| Value of certifications/job placements for WE&T participants | \$x.xx |
| # of technical support touches and/or number of hours of support | \$x.xx |
| Dollars invested in construction (for completed projects) | \$x.xx |
| Salaries from jobs created within completed projects | \$x.xx |
| Total expenditures directly invested into REN community | \$x.xx |
| [RENs would continue to add as numbers become available] | \$x.xx |
| Additional monetized value | |
| External funding leveraged (<i>enables additional services to be brought to the community through existing EE pathways</i>) | \$x.xx |



Huntington Beach Orange County

FINANCE SECTOR

SoCalREN's Finance Sector places an emphasis on increasing the number of impactful projects completed throughout the territory, particularly in underserved areas.

Overview of Finance Sector Performance

Lack of access to capital resources is a primary barrier that prevents the implementation of energy efficiency (EE) projects throughout the region. SoCalREN offered one financing program in 2022, the Revolving Savings Fund, focused on supporting public agencies interested in obtaining financing for improvements.

Figure 20. Finance Sector 2022 Performance



Sector Modifications

No modifications were made to the Finance Sector in 2022.

New Program Offerings

No new programs were offered within the Finance Sector in 2022.

Finance Sector Optimization/Outlook

The sector will continue to focus on pipeline development to ensure replenished funds can be leveraged by new projects, enabling the revolving cycle to continue.

Public Agency Revolving Savings Fund (RSF)

Description

SoCalREN's Revolving Loan Fund, publicly known as the Revolving Savings Fund, is a Market Support financing program that supports energy upgrades to facilities owned by public agencies in underserved communities. The Revolving Savings Fund reduces disparities in access to energy efficiency programs and increases energy efficiency adoption in underserved communities. With the Revolving Savings Fund, public agencies can overcome budgetary barriers and complete projects faster. The Revolving Savings

Fund objectives are as follows:

- Encourage completion of SoCalREN projects in underserved communities;
- Help SoCalREN program participants in underserved communities overcome barriers to accessing capital due to funding and budget challenges;
- Increase awareness of the low cost of capital and low-risk financing for underserved SoCalREN participants' energy efficiency projects;
- Build awareness of the lifecycle financial benefits of low-cost financing options for energy efficiency projects and services, and;
- Increase the number of financing resources for underserved communities.

Services

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

Loans are financed with \$2.2 million in seed capital, provided through the County of Los Angeles using American Reinvestment and Recovery Act (ARRA) funds already granted by the CEC.

RSF ensures agencies have the support they need to secure long-term financing and to pay back the loan. To help agencies build buy-in for using the Revolving Savings Fund, the program provides a project proposal, a template board resolution, and other resources that make the program easy to understand and easy to use.

Figure 21. How SoCalREN’s Revolving Savings Fund Works



Performance

SoCalREN’s engagement and outreach activities successfully built a pipeline of projects and reserved nearly all Revolving Savings Fund seed funds. In 2022, SoCalREN disbursed \$1,990,000 in total to two public agencies. SoCalREN also provided an offer to finance one additional public agency, which they accepted. That loan, totaling \$91,806, will be disbursed in the first quarter of 2023. SoCalREN has a pipeline of three potential projects interested in leveraging Program funding in the future. In total, these potential projects will result in commitments amounting to \$1,096,933. During the fourth quarter of 2022, the Revolving Savings Fund received its first loan replenishment payments as agencies started repaying their loans, amounting to \$43,395.60.

Figure 22. Revolving Savings Fund Commitment Pipeline



Delays within public agency processes and challenges related to IOU incentive program approvals have prevented participating agencies from completing projects that are currently in progress. However, once completed, the projects will deliver meaningful energy savings to the program participants. Anticipated savings from projects in the pipeline are featured in the table below.

Table 3. Revolving Savings Fund Energy Savings Pipeline

| kWh | kW | Therms |
|---------|-----|--------|
| 794,942 | 111 | 2,603 |

Modifications

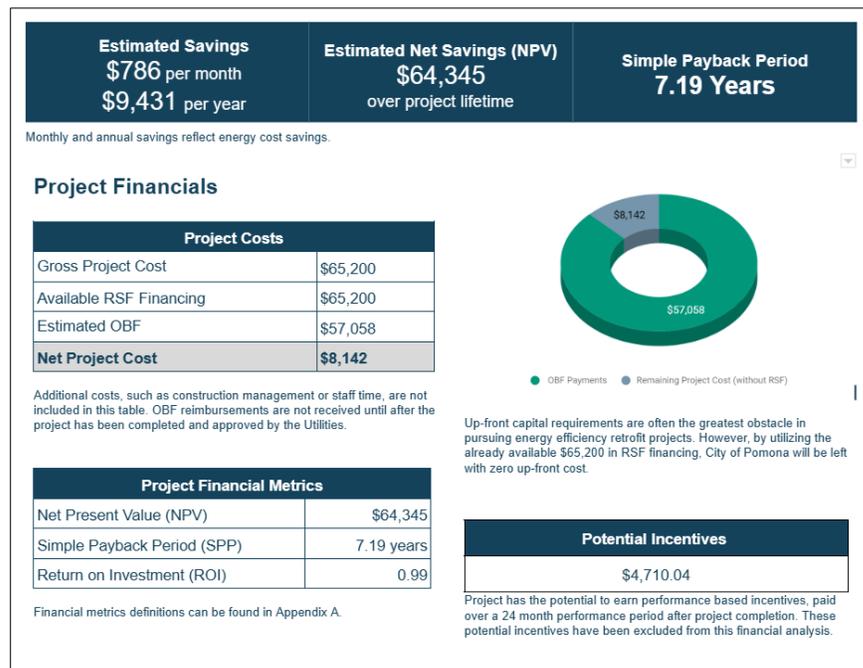
The program was relatively stable, and no modifications were implemented in 2022.

2022 Strategies

SoCalREN continued to focus on promoting the Revolving Savings Fund to public agencies through multiple project touchpoints. Following are key strategies from 2022:

- Assessed RSF opportunity for all project sites audited through the public sector programs.
- Supported participants with program application development and submission.
- Continued exemption of administrative fees to improve agency buy in on leveraging the funds.
- Showcased Revolving Savings Fund in program financial analyses.

Figure 23. Example Revolving Savings Fund Analysis in Project Proposal



Optimization/Outlook

In 2023, the Revolving Savings Fund will continue to focus on pipeline development to ensure replenished funds can be leveraged by new projects, enabling the revolving cycle to continue.



Pomona Los Angeles County

PUBLIC SECTOR

SoCalREN’s Public Sector programs drive community resilience by facilitating projects that benefit the local economy and inspire action. Programs and services unleash agencies’ potential to lead by example and drive GHG reductions through comprehensive EE approaches, with a focus on underserved communities.

From initial energy benchmarking through project closeout, SoCalREN works alongside agency staff—all at no cost to the agency. SoCalREN offers customizable support for a wide range of facilities and assets, including schools, libraries, streetlights, water and wastewater facilities, parks and recreational facilities, data centers, police departments, city halls, and community centers. Program teams work collaboratively with engineering firms, contractors, regional partners, third party program implementers, SCE, and SoCalGas to ensure seamless and streamlined “one-stop” services to customers.

Figure 24. Public Sector Collaborators



Overview of Public Sector Performance

The 2022 suite of Public Sector programs delivered significant value both in energy savings and non-energy benefits. SoCalREN's performance is based on achieving both energy savings and non-energy related goals, such as building public agency capacity and expertise, economic resilience, and delivering benefits to underserved communities across the territory. Together, SoCalREN's network of public agencies achieved 12,686,307 first-year annual kWh, 1,594 kW, and 107,669 gross therm savings in 2022.

SoCalREN's customized technical support helps public agencies implement thorough yet cost-effective energy upgrades and energy management practices. SoCalREN builds the public sector's capacity to lead communities toward a sustainable energy future by supporting public agency energy projects, offering educational opportunities, and creating connections among agencies for peer-to-peer learning.

The four public sector programs offered by SoCalREN are supported by a cross-cutting financing program, the Revolving Savings Fund, that helps public agencies finance projects developed through its energy efficiency programs. Despite continued challenges presented by COVID-19, supply-chain disruptions, inflation, and a changing energy efficiency program landscape in 2022, these programs made a difference for California communities, focusing on those most in need. The public sector aims to maintain a minimum of 50 percent of installed projects within underserved communities across all programs. In 2022, 83 percent of completed projects (59) were located in underserved communities⁴.

In addition, 71 percent of enrolled agencies to date support underserved communities, and 68 percent of all agencies that received one or more SoCalREN service in 2022 support underserved communities.

Marketing and Outreach Achievements

SoCalREN's communications efforts in 2022 were focused on **encouraging enrollment** for eligible public agencies and **increasing the engagement and capacity** of agencies enrolled in the programs. Marketing and outreach efforts in 2022 included:

- Building agency capacity and expertise with a focus on region-specific engagement via SoCalREN's regional partners;
- Developing outreach materials that align with audience communications preferences and priorities, including email marketing campaigns, online and printed materials outlining SoCalREN's services, and social media campaigns to provide informational and educational materials to agencies, and;
- Ensuring a continued high customer satisfaction rating.

⁴Underserved is defined as Communities in the 25th percentile of CalEnviroScreen 4.0, very low-income communities (as defined by California Department of Housing and Community Development), Title 1 schools, and rural communities (based on rural-urban commuting area).

Figure 25. Public Sector Marketing Highlights

In 2022, SoCalREN’s online registration page (socalren.org/join) received 1,203 page views with 13 new agency registrations, five of which are now enrolled in the Public Agency Programs. To build agency capacity and expertise, SoCalREN offers registered agencies a Network Toolkit upon registration that includes guidebooks to get started on energy efficiency projects, a library of webinars, and marketing tools like web-badges and social media posts for agencies to share their commitment to energy efficiency with their community. In addition, SoCalREN conducted a total of 25 outreach activities including workshops, webinars, and conferences in 2022. The sector continued to focus on region-specific engagement to customize topics to local needs.

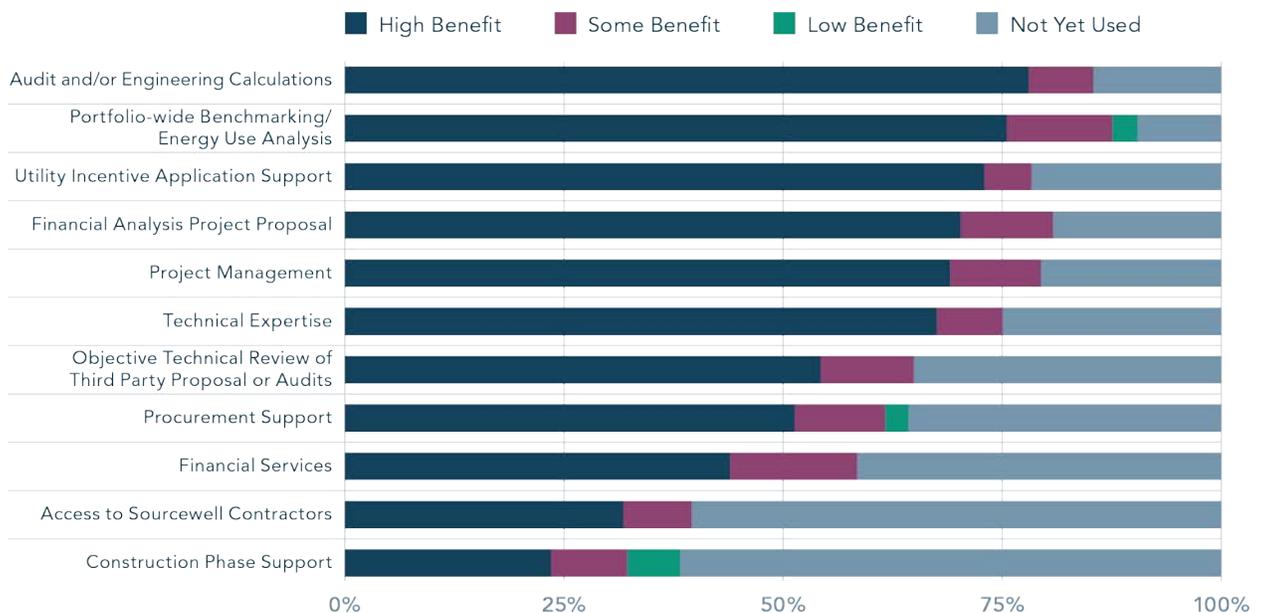
SoCalREN exceeded its unique outreach materials goal of 40 and developed 44 new materials, including email marketing campaigns and print materials, many customized for use with or by specific agencies. SoCalREN also continued to grow its social media presence on LinkedIn, Facebook, Twitter, and Instagram and the public sector programs were frequently featured as top performing posts across all sectors in 2022. See Appendix B for additional details on all 2022 marketing and outreach activities.

Figure 26. Sample Public Sector Marketing Collateral



SoCalREN conducted its annual satisfaction survey in 2022 and exceeded its goal of 80 percent customer satisfaction, with an overall 89 percent customer satisfaction score. Nine out of 10 enrolled agencies stated that they would recommend SoCalREN to others.

Figure 27. 2022 Satisfaction Survey Responses on Benefits of Various Services



Sector Modifications and New Offerings

The public sector implemented two key modifications in 2022 to fill market gaps created by the closure of IOU programs. SoCalREN added incentives to its Metered Savings Program and launched the Streamlined Savings Pathway. Both programs directly support SoCalREN's core value to increase energy and GHG reductions. These incentive programs motivate agencies to tackle projects sooner, delivering GHG emission reductions that contribute to local and state climate goals.

Figure 28. SoCalREN's Public Sector Evolution



Public Sector Optimization/Outlook

While the market is still challenged by the impacts of COVID-19, supply chain delays, and inflation, 2023 is poised to bring unprecedented opportunities in public sector energy efficiency. New funding and financing resources authorized through the Inflation Reduction Act (IRA) and other federal and state funding resources will help public agencies across SoCalREN's service territory plan for long-term energy resilience. SoCalREN's programs will offer services and support to public agencies seeking to access new funding streams and stack any resources onto available incentives to drive the completion of more energy projects. SoCalREN's Program Administrator, Los Angeles County, will continue to identify and apply to additional grants in order to value stack ratepayer and non-ratepayer funds alike increasing the impact of its programs beyond EE.

The EE landscape will continue to evolve in 2023, as several new third-party public sector programs ramp up. SoCalREN will continue to collaborate closely with third-party program implementers in 2023 to identify the best program pathway for each energy project, reduce customer confusion, and ensure there is no duplication of services. Even as new energy programs come online, public agencies continue to rely on SoCalREN for

critical project delivery services and guidance, particularly as programs become increasingly complex. In 2023, SoCalREN will continue to support the 200+ energy efficiency projects in our pipeline and will help public agencies develop new project opportunities.

SoCalREN will also dedicate 2023 resources to focus on decarbonization through fuel substitution. In alignment with CPUC building decarbonization efforts⁵, Pathway to Zero will focus on driving fuel substitution measures like heat pump water heaters and heat pump air conditioners through education, outreach, and capacity building, as displayed in the figure below. SoCalREN will explore enhanced Streamlined Savings Pathway incentives for fuel substitution measures, and the Metered Savings Program will also analyze meter-based savings modeling for fuel substitution and gas measures. In addition to these efforts, SoCalREN will continue to explore opportunities to collaborate with CCAs, other PAs, IOU third-party program implementers, CBOs, and other stakeholders to serve public agencies in our territory.

Figure 29. SoCalREN Decarbonization Measures Fact Sheet

Southern California REGIONAL ENERGY NETWORK
SoCalREN Public Agency Programs | socialren.org

Decarbonize your facilities by installing fuel substitution measures with the help of SoCalREN's cash incentives!

Heat Pump Water Heaters (HPWHs)

A HPWH is a high-efficiency electric water heater that transfers heat from the air into water stored in a tank.

A HPWH works like a refrigerator, except in reverse. While a refrigerator removes heat from an enclosed box and expels that heat to the surrounding air, a HPWH takes the heat from surrounding air and transfers it to water in an enclosed tank.

Heat Pump Air Conditioners

Heat pump air conditioners offer an energy efficient alternative to packaged or split gas-electric systems for comfortably heating and cooling your facility.

To heat, heat pumps move heat from the cool outside air to inside your facility. To cool, heat pumps move heat from your facility outside. Because they transfer heat rather than generate heat, heat pumps can efficiently provide the desired temperatures for your facility.

\$

Agencies that install fuel substitution measures are eligible for SoCalREN cash incentives on a first-come, first-serve basis

Why install decarbonization measures?

- ✓ **Ready your facility for a more resilient energy future.** You can reduce your dependency on outside fuel sources when you also consider installing solar photovoltaics and battery storage at your project site.
- ✓ **Reduce local air pollution and greenhouse gas emissions.** These efficient heat pump systems do not rely on natural gas, which means they avoid gas combustion that releases harmful air pollutants inside buildings.
- ✓ **Align your agency with California's upcoming statewide goals.** California has ambitious plans to be carbon neutral by 2045. Get ahead of the curve and receive incentives for it!
- ✓ **Save money and modernize your equipment.** Upgrading to high efficiency equipment can save you money on your utility bills!

Interested? Talk with your SoCalREN Project Manager to get started.

The SoCalREN Public Agency Programs are administered by the County of Los Angeles and funded by California utility ratepayers under the auspices of the California Public Utilities Commission.

⁵ <https://www.cpuc.ca.gov/about-cpuc/divisions/energy-division/building-decarbonization>

Energy Efficiency Project Delivery Program

Description

SoCalREN’s Energy Efficiency Project Delivery Program (EE PDP) is a Public Sector Market Support program that provides public agencies with customized energy efficiency services so they can become proactive stewards and leaders in energy action. The program identifies energy saving measures and works side-by-side with public agency staff to overcome barriers throughout the energy efficiency project, from performance specification to construction completion. SoCalREN-enrolled agencies can also access peer expertise, resources, shared procurement strategies, best practices, and lessons learned to leverage the collective knowledge and expertise of the SoCalREN network, reduce costs, and address common barriers.

Services

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

- Project management support from project identification through construction completion;
- Energy consumption benchmarking and comparative energy usage analyses;
- Technical support, including identification of energy efficiency improvements, facility energy audits, and energy efficiency measure performance specifications;
- Analysis of financing options, financial advisory services, financing, and grant application support (e.g., the California Energy Commission’s low- and no-interest Energy Conservation Assistance Act loan and OBF) and assistance with rebate and incentive applications, and;
- Proposal and construction support, including procurement guidance, staff approval support, construction management support, and third-party objective review.

Figure 30. Project Delivery Program’s Project Services and Delivery Approach



SoCalREN provides tools, resources, webinars, and more to help public agencies increase energy expertise, build 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:
 - Guidebooks to help public agencies get started right away on energy projects, with topics including benchmarking, procurement, building project support, and working with ESCOs;
 - A library of case studies to demonstrate how similar agencies have achieved energy efficiency leadership across the SoCalREN service territory;
 - Communications materials, including a web badge, press release template, social media post templates, and talking points to announce membership in the SoCalREN network, and;
 - Recordings of past webinars and PDFs of presentation materials.
- Support with recognition of leadership in energy efficiency, such as incentive check presentations, case study development, trade group award nominations, awards, and social media content development.

Figure 31. 2022 Case Study for City of Carson

About the Project

The City of Carson completed modulating vertical boiler (MVB) installations in their Community Center. The project will provide beneficial maintenance upgrades to the boilers, just in time for the colder season. With the help of SoCalREN, Carson secured incentives through the Statewide Water Heater Program (SWHP), which improved the project's payback and return on investment.

SoCalREN assisted the City with application support, project management, and identifying approved distributors for the project. As a result, the City of Carson secured a total rebate amount of \$1,500. In collaboration with the City's Energy Service Company (ESCO) partner, TRANE, SoCalREN provided energy use analysis and grant application support to make the project happen.

Project Outcomes

- \$38,500+ Lifetime cost savings
- \$1,500 Incentives secured
- 20 years Estimated useful life of project
- 10% Reduction in site energy use

No-Cost SoCalREN Services Utilized

- Audit/Calculations
- Benchmarking Analysis
- Design/Scope of Work
- Grant Viability Analysis
- Utility Incentive Application
- Project Management
- Close-out Support

Project Summary and Benefits

- Estimated 10% energy reduction at site
- Measures implemented: commercial hot water boilers
- Annual energy cost savings: \$1,928
- Annual therms savings: 2,056
- Measures estimated useful life: 20 years
- Lifetime energy cost savings: \$38,554
- Total Statewide Water Heater Program incentive secured: \$1,500
- Internal funding used: \$24,245
- Project timeline: September 2020 to March 2022

Fun Fact! The commercial hot boiler installations in the City of Carson's Community Center are estimated to have a thermal efficiency (TE)* of 84%!

*Thermal efficiency is the ratio of the heat energy (Btu/h) absorbed by the water to the heat energy available in the fuel burned.

What's Next for the Agency?

To achieve more significant energy savings, the City of Carson plans to replace chiller and heating, ventilation, and air conditioning (HVAC) units at their City Hall and Community Center and incorporate electric vehicle (EV) charging stations near City Hall. These projects contribute to the city's environmental initiatives that residents can participate in and benefit from. SoCalREN looks forward to supporting the City of Carson in their continued sustainability efforts!

About the City of Carson

Located in the South Bay region of Los Angeles County, the City of Carson is a culturally diverse community of over 92,000 people that provides unique recreational experiences for the public. Carson City residents have access to personal enrichment programs that promote career exploration, mental and physical health, education, cultural arts, and civic engagement. Residents also have access to recreational facilities such as parks, aquatic centers, sports complexes, and the Carson Community Center. Despite the COVID-19 pandemic, the City is determined to continually enhance its program initiatives to encourage a vibrant and well rounded environment for its residents.

Carson Community Center

Objectives

- **Fill market gaps** in the public sector and provide public agencies with comprehensive energy efficiency support for their facilities and infrastructure.
- Increase public agencies' ability to meet local, regional, and state **energy targets**, climate targets, and policy goals.
- **Increase the number of participating public agencies** in SoCalREN, 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 resource programs to reduce overall community energy consumption.
- Deliver **persistent energy savings** through resource programs.
- **Expand the implementation of cost-effective energy efficiency projects.**

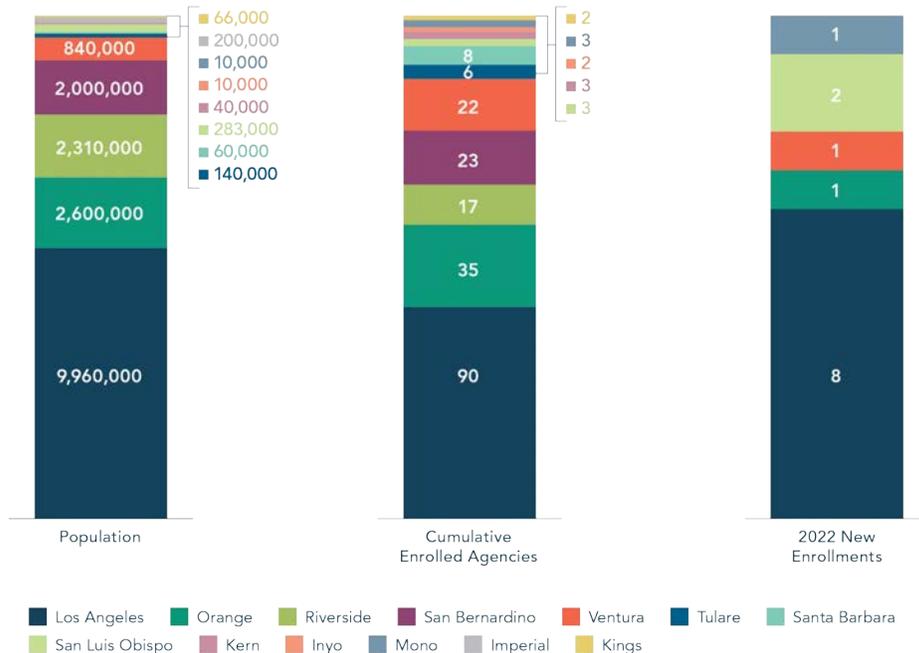
Performance

Regional Reach Achievements

In 2022, SoCalREN demonstrated commitment to expanding its reach and maintaining diverse agency representation across the territory. The goals of the public sector’s Regional Reach strategy are to: (1) deliver valuable services to the entire service territory, (2) strengthen communication among SoCalREN agencies and partners, (3) enhance services in sub-regions, and (4) identify opportunities and initiate efforts to meet specific sub-regional needs.

In 2022, SoCalREN enrolled 13 agencies, bringing total enrollment to 214 agencies. Seven agencies were waitlisted for enrollment in 2022 and are expected to be enrolled and onboarded in Q1 of 2023.

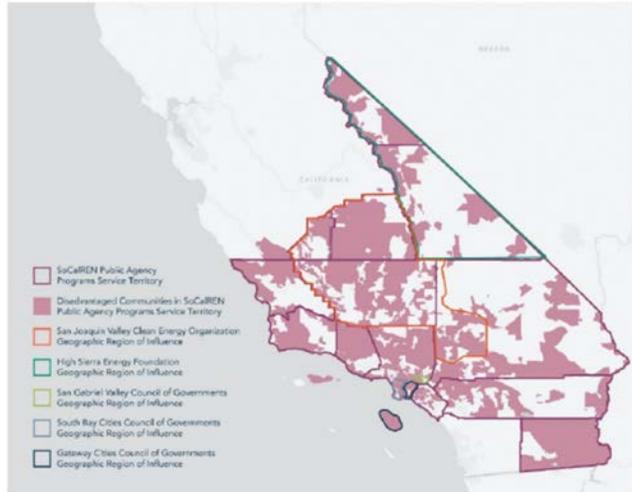
Figure 32. Enrolled Public Agencies by County



One key success of the Regional Reach strategy is the continued coordination with five Regional Partners to enhance engagement efforts and increase local energy action and projects. Regional Partners serve as key engagement liaisons to expand local agency

enrollment, identify service gaps and training opportunities, and ensure agency participation in programs.

Figure 33. Regional Partner Areas of Influence



Throughout 2022, the Regional Partners focused on new enrollments, marketing, energy analysis, and education and outreach efforts. As described in more detail below, Regional Partners facilitated seven of the 13 enrolled agencies, led 16 working group meetings/committees, presented 16 comparative energy analysis reports, and led 5 outreach and education events across the SoCalREN territory.

Figure 34. 2022 Regional Partnership Impacts



Project Identification and Implementation Achievements

To identify energy-saving projects, the Project Delivery Program uses a variety of strategies, including comparative energy analysis reports (CEAs). CEAs evaluate agency-wide energy use across buildings and infrastructure, identify the highest energy users, and provide a preliminary assessment of potential energy savings. In 2022, PDP delivered 32 CEAs.

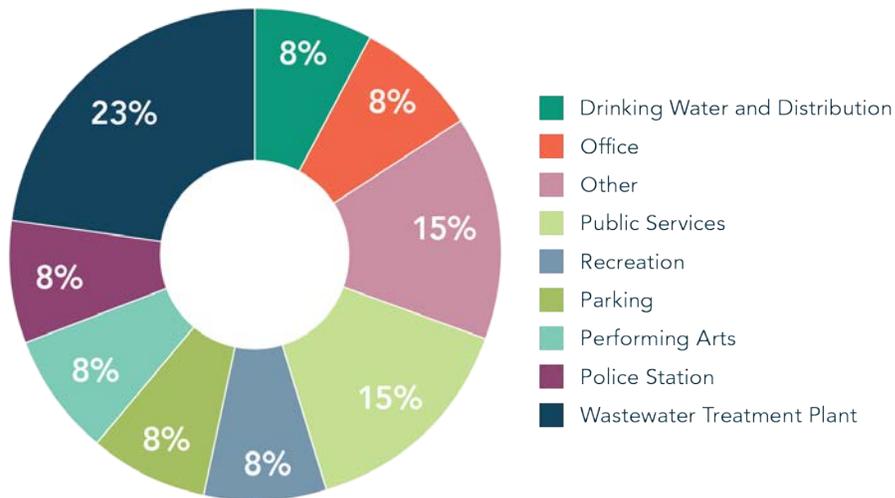
Participating agencies can use a variety of no-cost services to overcome common barriers they face with energy projects. The following table shows the percentage of 2022 projects that received specific services.

Table 4. 2022 Installed Projects Leveraging Project Delivery Program Services

| Program Service Type | Percent of Projects Utilizing Service |
|--------------------------------|---------------------------------------|
| Project management | 100% |
| Audit/engineering calculations | 72% |
| Objective technical review | 81% |
| Incentive application support | 93% |
| Financial analysis | 81% |
| Financial services | 28% |
| Procurement support | 37% |
| Construction phase support | 33% |
| Benchmarking | 26% |

For projects delivered in 2022 and those expected to be delivered in future years, the program performed audits and delivered Initial Measures Lists for 22 sites.

Figure 37. Breakdown of Facility Types Audited through the Project Delivery Program



SoCalREN recognizes the importance of contributing persistent energy savings to help California meet its climate goals and energy resource capacity needs. While the Project Delivery Program is a Market Support program, it channels claimable energy savings to Resource Acquisition programs. The following table reflects savings the SoCalREN Project Delivery Program has funneled through IOU or SoCalREN Resource Acquisition programs⁶. These energy savings will result in a more than 3,390-metric ton greenhouse gas (GHG) emissions reduction, equivalent to taking more than 700 cars off the road for one year.⁷

⁶ 95% of projects were channeled to resource programs. Metrics are inclusive of projects that did not claim savings.

⁷ Source <https://www.epa.gov/egrid/summary-data> and 4.49 metric tons CO₂e/vehicle /year (EPA GHG calculator).

Figure 38. Project Delivery Program Savings Installed in 2022⁸

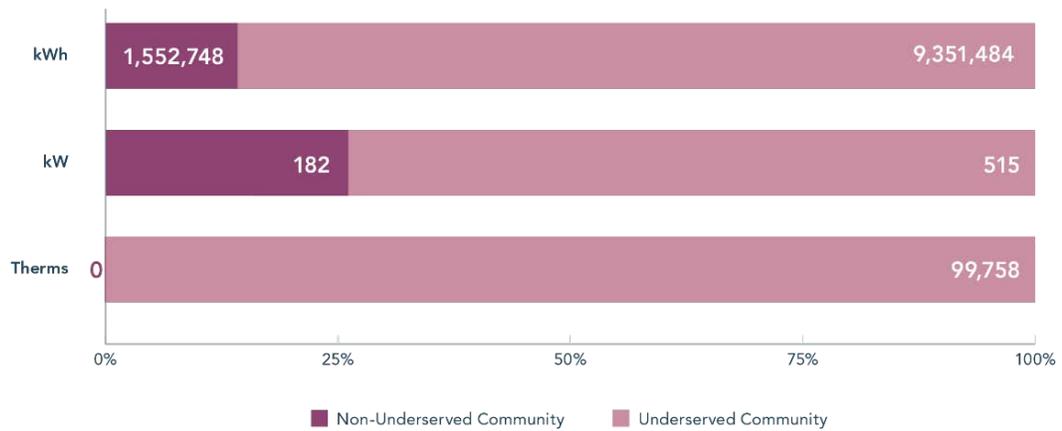
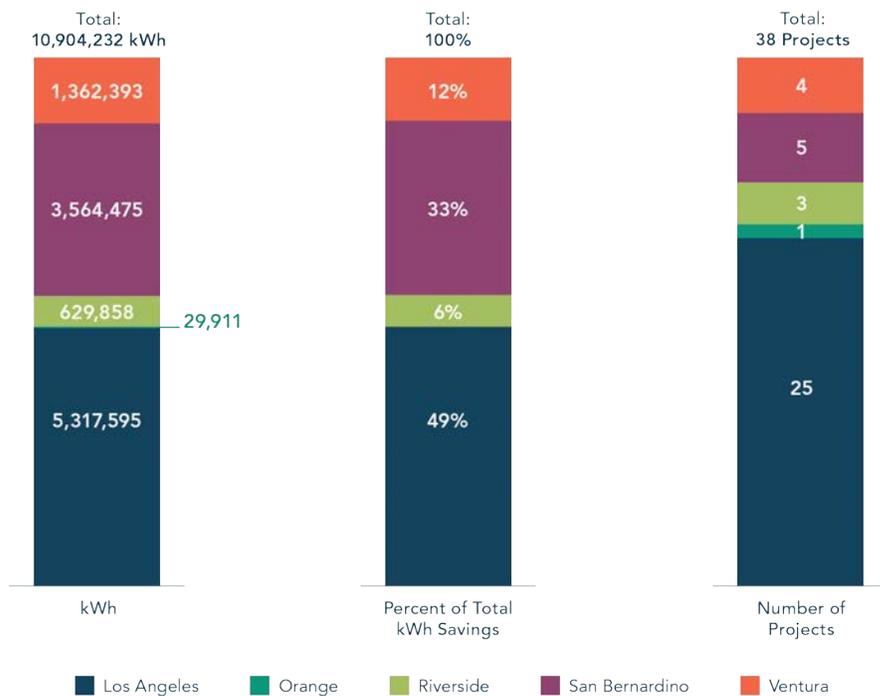


Figure 39. 2022 Project Delivery Program kWh Savings by Eligible County



In addition to supporting projects that were installed in 2022, the Project Delivery Program developed new projects for 2023 and beyond. Building a pipeline of future energy-saving projects is essential to long-term program success since it takes approximately 41 months or 3.4 years on average for SoCalREN agencies to complete projects. These pipeline projected savings are shown below.

Table 5. Project Pipeline Developed

| | | |
|-----------------------------|----------|---------------|
| 11,915,937 kWh ⁹ | 2,670 kW | 63,467 therms |
|-----------------------------|----------|---------------|

⁸ Not all installation reports submitted in 2022 are claimed by resource programs in 2022. Metrics also include 2022 installed projects that are channeled through the Metered Savings Program, which does not require Installation Reports.

⁹ 4,631,163 kWh are channeled to Los Angeles Department of Water and Power through support from BMCTA funding.

SoCalREN offers financial analyses to help agencies evaluate the economic viability of projects and provides application support to help agencies obtain the incentives or financing they need to make their projects a reality. By helping agencies reduce project costs and save on their utility bills, SoCalREN frees up scarce public resources for services like public safety, firefighting, and education. The program also supports economic development and construction jobs in the energy efficiency industry. SoCalREN agencies had gross construction costs of over \$9 million in 2022 Project Delivery Program projects, supporting 100 jobs across California.¹⁰

Table 6. Financing Support Services

| | |
|--|--------------------|
| Number of rebate/incentive applications supported | 27 |
| Total rebate/incentives secured (\$) | \$2,274,348 |
| Total zero-percent interest OBF secured (\$) | \$201,294 |
| Annual utility bill savings | \$2,129,563 |

Modifications

In 2022, the program streamlined processes, improved cost effectiveness, and responded to the evolving needs of the market. There were no significant modifications to the Project Delivery Program design in 2022. See the Sector Modifications section for modifications impacting all programs.

2022 Strategies

The following are noteworthy 2022 strategies that built on SoCalREN's record of successful program design.

Coordination with Third-Party Programs

The energy program landscape continued to evolve in 2022 as several new statewide third-party energy efficiency programs launched, including the Public Energy Performance (PEP) program and the Statewide Water Infrastructure and System Efficiency™ Program (SW WISE™). To provide reliable support and minimize customer confusion, SoCalREN's third-party program task force coordinated closely with third-party implementers to identify opportunities to help public agencies access and navigate the new programs.

¹⁰Construction 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/>).

Figure 40. SoCalREN's Third-Party (3P) Program Task Force Activities

Public Agency and Community Engagement through Regional Partners

SoCalREN continued coordination with its five Regional Partners—Gateway Cities Council of Governments, High Sierra Energy Foundation, San Gabriel Valley Council of Governments, San Joaquin Valley Clean Energy Organization, and the South Bay Cities Council of Government—to enhance engagement efforts and increase local energy action and projects. Regional Partners serve as engagement liaisons to expand local agency enrollment, identify service gaps and training opportunities, and ensure enrolled agencies get the most out of program participation. Throughout 2022, the Regional Partners focused on new enrollments, marketing, energy analysis, education and outreach efforts, and new community engagement strategies. Regional Partners also focused on innovative ways of keeping the member agencies they represent engaged and participating in SoCalREN programs. Specifically, these components were grown or newly added:

- **Energy Manager Working Groups:** quarterly meetings and presentations of SoCalREN content to member agencies plus a discussion agency participation progress
- **Competitive models:** Active competitive modes to motivate member agencies in completing various energy milestones and participating in SoCalREN programs
- **Community workshops:** South Bay Cities Council of Government helped to launch the first series of community-facing energy workshops for three agencies which featured residential energy education and highlighted the SoCalREN regional partnership effort
- **Agency recognition:** all five regional partners led strong efforts to showcase the progress of the enrolled SoCalREN agencies they represent through presentations, newsletters, and social media

Marketing

SoCalREN's communications efforts in 2022 were focused on encouraging enrollment for eligible public agencies and increasing the engagement and capacity of agencies already enrolled in the program. Project Delivery Program marketing was primarily conducted through email campaigns (e.g., monthly newsletters), social media content,

website content, and events (e.g., workshops, webinars, and conferences). Regional Partners helped to promote the Project Delivery Program and SoCalREN Public Agency Programs as a whole. For additional information on 2022 marketing, see Appendix B.

Energy Data Collection

SoCalREN transitioned from using Southern California Edison's *Green Button Connect* to using *UtilityAPI* for collecting monthly and interval agency electricity data. At no cost to participating agencies, UtilityAPI offers a user-friendly authorization experience and provides SoCalREN teams with access to data nearly instantly. This service allows for more flexibility to expand data collection and analysis services in the future. In 2022, SoCalREN authorized 13 agencies (nine cities, two school districts, and two special districts), representing an aggregated portfolio total of 3,023 SCE Service Accounts.

Figure 41. Screenshot of Anonymized UtilityAPI platform

| SAID | Address | Tariff | Latest | Data collected |
|------------|---|------------------|----------------------------------|---|
| 800XXXXXXX | 12345 Main Street, San Diego, CA 92101 | TOU-GS-3B | 1.6 years ago - Data collected. | Bills: 40 (3.3 years) ✓ Intervals: 76786 (2.2 years) ⚠ |
| 800XXXXXXX | 56789 Market Street, San Diego, CA 92101 | TOU-GS-2-D | 1.6 years ago - Data collected. | Bills: 86 (7.1 years) ✓ Intervals: 10225 (1.2 years) ⚠ |
| 800XXXXXXX | 98765 Broadway, San Diego, CA 92101 | TOU-GS-2-B | 1.6 years ago - Data collected. | Bills: 40 (3.3 years) ✓ Intervals: 39991 (1.3 years) ⚠ |
| 800XXXXXXX | 43210 University Ave, San Diego, CA 92101 | TOU-GS-1-E-(SCE) | 1.6 years ago - Data refreshed ⚠ | Bills: 85 (7 years) ✓ Intervals: 9697 (1.1 years) ⚠ |
| 800XXXXXXX | 11111 Harbor Dr, San Diego, CA 92101 | TOU-GS-2-D-(SCE) | 1.6 years ago - Data collected. | Bills: 83 (6.9 years) ⚠ Intervals: 3667 (8.8 months) ⚠ |

Show 110 more meters ▾

Resource Restrictions and Management

Currently, the EE Project Delivery Program is underfunded and cannot meet the demands of the sector because of the existing budget caps. The 2022 program year marked the first time since SoCalREN launched its public sector programs that potential participants were turned away from program services because there was not enough program budget to meet demand. Seven public agencies are currently waitlisted and awaiting enrollment in the Project Delivery Program, which is the necessary first step to take advantage of program services and engage in any of SoCalREN's public sector programs.

The Project Delivery Program also enacted an audit cap during 2022, which reduced the audit services agencies could receive. This allowed SoCalREN to closely manage program resources and ensure services were available for a wide breadth of agencies throughout the region. In the final quarter of the year SoCalREN restricted all audits and carefully vetted which project development opportunities were best aligned with 2022 delivery or an agency's funding and financing needs.

Optimization/Outlook

The Project Delivery Program will continue to improve and integrate feedback to refine services. Program activities and optimization strategies for 2023 include:

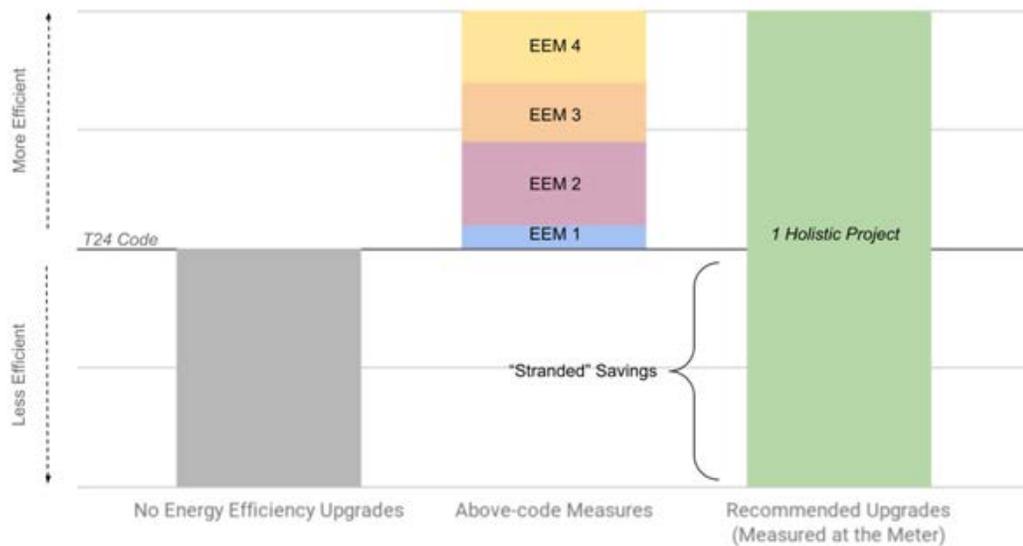
- Updating audit and project commitment processes to better align services with agency planning and budgeting cycle needs.
- Coordinating with stakeholders to better understand the continued impacts of COVID-19 on procurement and equipment production to improve project pipeline expectations.
- Continued discussions with third-party program implementers to align services with new incentive programs. As in 2022, this will include identifying opportunities to simplify deliverables and separate SoCalREN deliverables from the IOU incentive process.
- Advance three successful new strategies with Regional Partners in 2022: Efficient San Gabriel Valley (eSGV), Facility Equipment Inventory (FEI), and Energy Resiliency Action Plans (ERAP). SoCalREN will continue these activities in 2023 by working with partners to achieve established goals. These efforts will be enhanced in 2023 to include stakeholder engagement to gain input on work products, feature updates, and accomplishments of each strategy.
- Marketing optimizations:
 - Solicit feedback from agencies on desired resources, then create and add exclusively to the network toolkit to drive traffic
 - Expand availability of in-language materials for agency use with community outreach
 - Promote network toolkit offering as high-value resource and entry point into engaging with SoCalREN
 - Modify structure and delivery model for agency-specific documents to streamline process and get materials to agencies faster

Metered Savings Public Agency Program

Description

SoCalREN’s Metered Savings Program—the public facing name for the Normalized Metered Energy Consumption (NMEC) Public Agency Program—is a Resource Acquisition program that offers agencies with “stranded” savings access to SoCalREN’s support and cash incentives. The program uses NMEC to measure energy savings at the meter before and after project implementation. When the SCE NMEC program closed in 2022, the Metered Savings Program filled gaps by offering cash incentives.

Figure 42. Metered Savings Program Addresses Stranded Savings



The Metered Savings Program’s approach encourages public agency participation and makes multi-measure project review simpler, helping agencies complete energy projects that save more energy, and complete them faster. Energy efficiency savings from these projects contribute to SoCalREN portfolio goals, state energy efficiency goals, and energy efficiency portfolio cost-effectiveness calculations.

Services

- Weather-normalized facility energy usage model
- Technical support for project application development
- Expedited third-party technical review of project applications
- Cash incentives for project savings realized at the meter
- Project energy savings reports and post-installation training for facility staff

Objectives

- Reduce project complexity and improve project completion timelines

- Provide technical expertise and appropriate training to facility personnel to ensure the persistence of savings
- Deliver deep energy savings to public agencies, with a focus on underserved communities
- Contribute to climate goals by offering incentives based on GHG reduction
- Improve technical review and project completion timelines in the public sector

Performance

In 2022, the program focused on implementing projects while developing a strong project pipeline for 2023 and beyond. It also adapted to fill gaps left by closing IOU programs (see 2023 Strategies section below).

Table 7. Metered Savings Program Energy Savings

| | 2022 Completed Projects* | |
|-----------------------|--------------------------|-----------------|
| First year net kWh | 601,225 | 67% underserved |
| First year net kW | 410 | 67% underserved |
| First year net Therms | 0 | – |
| Lifetime net kWh | 2,022,298 | 67% underserved |
| Lifetime net kW | 1,662 | 67% underserved |
| Lifetime net therms | 0 | – |

*2022 Completed Projects metrics include true-ups from 2021 construction completed projects.

Table 8. Metered Savings Program Pipeline Developed for Future Years

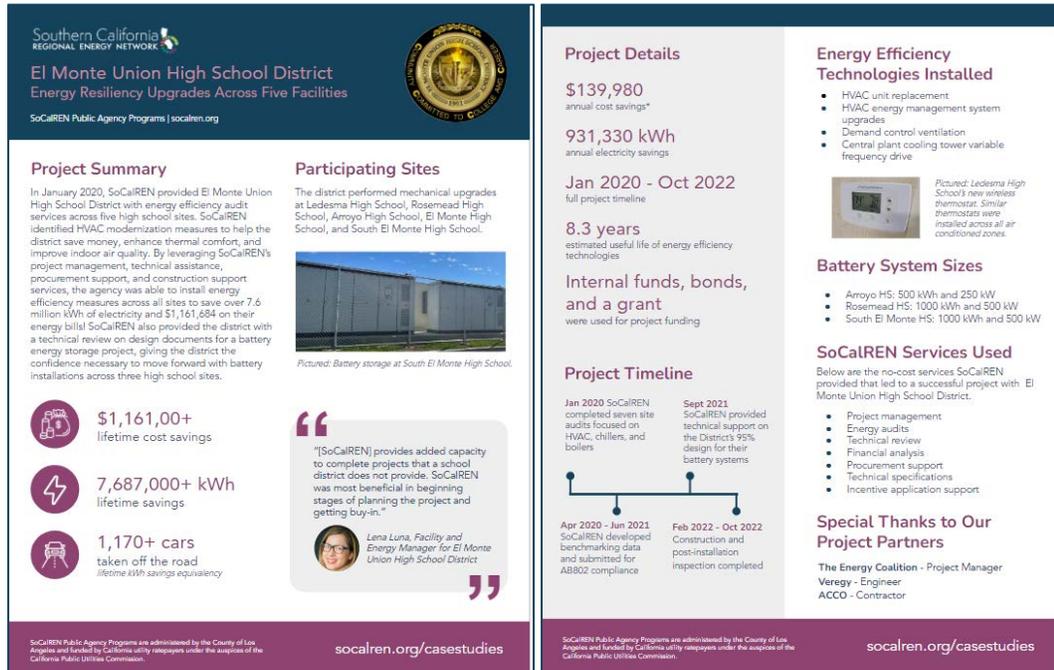
| | Pipeline Developed | |
|-----------------------|--------------------|-----------------|
| First year net kWh | 5,967,602 | 58% underserved |
| First year net kW | 349 | 88% underserved |
| First year net therms | 55,617 | 99% underserved |

Table 9. Metered Savings Project Details

| Metric | Number of Projects | % Underserved |
|--|--------------------|---------------|
| Projects Installed | 5 | 100% |
| Projects Approved | 2 | 50% |
| Projects in Pipeline pre-Application Submittal | 21 | 52% |

The Metered Savings Program supports capacity building through marketing and outreach. In 2022, SoCalREN created a case study featuring El Monte High School District's five completed projects to highlight project successes and inspire other agencies to complete similar projects.

Figure 43. El Monte Union High School District Metered Savings Program Case Study



Modifications

Introducing cash incentives was a substantial modification made to the Metered Savings Program in 2022. This modification required the program to update many program tools and altered application processing. The Program improved marketing materials to enhance the participant experience, remove barriers to customer participation, and communicate the value of the Metered Savings Program.

2022 Strategies

The following are noteworthy 2022 strategies:

- **Anticipated and addressed challenges** from COVID-19 non-routine event (NRE) on energy projects and identified non-routine adjustment (NRA) solutions to mitigate project risks.
- **Introduced cash incentives** to fill the gap left by closing IOU programs.
- **Improved internal processes** to review incentive applications quickly and efficiently to provide approvals faster than other incentive programs.
- **Updated tools and templates** for enhanced efficiency in project review, approval, and close-out (i.e., measurement and verification plan data request).
- **Shortened the project screening timeline** and decreased costs by leveraging tools such as NMEC-R to analyze and model energy load profiles.

- **Actively participated in statewide working groups** and industry groups to drive NMEC policy and ensure it is in the best interest of public agencies and their projects.

Optimization/Outlook

In 2023, the Metered Savings Program will focus on completing planned projects, scaling up program participation for future years, and enhancing the participant experience.

Metered Savings Program optimizations for 2023 include:

- **Adjust the Program incentive structure** to optimize use of ratepayer funds for pipeline projects.
- **Continue to focus on equity** by offering enhanced incentives for projects in underserved areas, including low-income and hard-to-reach communities.
- **Explore opportunities to enhance early project screening protocols** to ensure engineering services fully assess a facility's NMEC potential and to use program funds efficiently.
- **Assess the viability of including gas meter analysis** into project processing to save therms, reduce GHG, and provide incentives to agencies for those savings
- **Explore adding fuel substitution measures** to the program and ensure appropriate incentive rates.
- **Investigate ways to improve the participant experience** with the receipt and review of project savings reports to increase projects' energy savings persistence.
- **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.
- **Continue close collaboration with CPUC staff** and industry experts to share agency experiences and ensure program processes align with the evolving NMEC guidebook.
- **Continue to utilize project savings reports** to inform agencies of their realized savings post-construction quarterly and after the one-year monitoring period. The report ensures that energy savings persist and allows agencies to track actual savings on their utility meter.

Pathway to Zero Program

Description

Pathway to Zero (the public-facing name for the *Public Agency Distributed Energy Resources in Disadvantaged Communities Project Delivery Program*) is an Equity program that maximizes energy efficiency opportunities while driving the integration of distributed energy resources (DERs) and realization of zero net energy (ZNE)¹¹ in the public sector. The program provides a comprehensive evaluation of energy opportunities for facilities in DACs,¹² very low-income,¹³ and rural communities,¹⁴ including energy efficiency measures and DER options. This program gives agencies the information they need to get started choosing the DERs that are right for their facilities.

Services

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

- Education and outreach regarding DER strategies, such as distributed generation, energy storage, electrification, demand response, energy management, and water efficiency optimization for public agencies;
- An enhanced CEA to identify and prioritize project opportunities based on specific community characteristics, energy consumption, and energy needs; and,
- Training and workshops on best practices for DERs, offered to current and potential SoCalREN-enrolled public agencies.

Objectives

- Increase the percentage of underserved public agencies engaging in holistic EE and DER energy strategies.
- Increase the ability of public agencies to meet local, regional, and state climate and energy goals.
- Increase the number of agencies participating in SoCalREN's programs, with an emphasis on DACs.
- Encourage agencies to lead by example through EE and DER projects.

Performance

In 2022, Pathway to Zero continued to help underserved communities achieve their energy resilience goals. The program expanded, adding six more underserved public agencies to the network. The program delivered 14 comprehensive Pathway to Zero reports, developed 27 new EE projects in underserved communities, and provided 16 audits.

¹¹ Per SoCalREN's adopted definition, ZNE 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.

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

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

¹⁴ As defined by Rural-Urban Commuting Area.

Figure 44. Pathway to Zero Program Performance



SoCalREN provided audits and Initial Measures Lists that assessed 16 public agency sites. Pathway to Zero provided underserved communities with the support services they needed to overcome barriers to address their climate and energy goals.

Figure 45. Breakdown of Facility Types Audited through Pathway to Zero

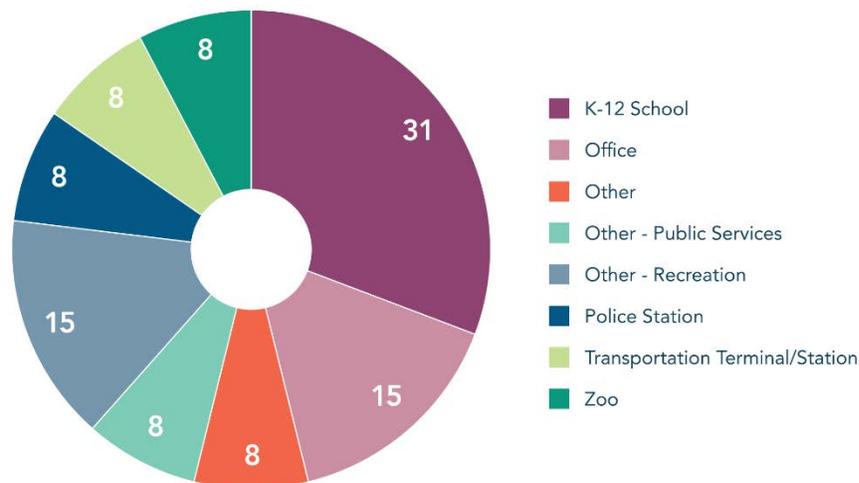


Table 10. 2022 Pathway to Zero Installed Savings

| 2022 Construction Complete Savings ¹⁵ | |
|--|-----------|
| First-Year Annual On-bill Savings (kWh) | 1,782,075 |
| First-Year Annual On-bill Savings (kW) | 897 |
| First-Year Annual On-bill Savings (therms) | 7,973 |

Energy savings associated with Pathway to Zero projects are attributed to and claimed by Resource Acquisition programs when applicable. Of the kWh savings in the Pathway to Zero Program 98 percent were channeled into resource programs. These energy savings will result in a 1,305 MTCO_{2e} GHG emissions reduction, equivalent to taking 290 gasoline-powered passenger cars off the road for one year.

¹⁵Not all installation reports submitted in 2022 are claimed by resource programs in 2022. Metrics also include 2022 installed projects that are channeled through the Metered Savings Program, which does not require Installation Reports.

Table 11. Installed Projects Leveraging Pathway to Zero Services

| Percent of Installed 2022 Projects (by Construction Completed) | |
|--|---------------------------------------|
| Pathway to Zero Service Type | Percent of Projects Utilizing Service |
| Audit | 93% |
| Benchmarking | 47% |
| Construction Phase Support | 47% |
| Financial Analysis | 93% |
| Financial Services | 7% |
| Incentive Application | 93% |
| Procurement Support | 53% |
| Project Management | 100% |
| Technical Review | 93% |

Table 12. Financial Benefits to DAC Public Agencies

| | |
|--|-----------|
| Annual Utility Bill Savings | \$334,113 |
| Total Resource Program Incentives Captured | \$189,583 |

Pathway to Zero goes beyond energy efficiency to provide agencies with comprehensive support to identify and implement DER projects, outlined in a Pathway to Zero report. These reports are customized to the specific site and the agency's interests and could include any of the DER and sustainability strategies described below. Fourteen Pathway to Zero reports were delivered in 2022. The table also displays the total instances that each DER measure type was presented in 2022.

Table 13. DER and Sustainability Strategy Information and Resources Shared

| DER and Sustainability Strategy | Number of Instances Shared |
|-----------------------------------|----------------------------|
| Battery Storage/Photovoltaic | 14 |
| Demand Response | 11 |
| Electric Vehicle Charging | 11 |
| Green Rate Options | 8 |
| Self-Generation Incentive Program | 7 |
| Photovoltaic and Battery Storage | 7 |
| Water Efficiency | 4 |
| Permanent Load Shifting | 2 |
| Wastewater | 1 |

In 2022, Pathway to Zero developed a significant pipeline¹⁶ of energy projects for 2023 and beyond. Pipeline development is essential to long-term program success since once identified, a project may take up to four years to complete.

Table 14. 2023 Pathway to Zero Project Pipeline

| | | |
|---------------|--------|---------------|
| 4,787,274 kWh | 616 kW | 86,455 therms |
|---------------|--------|---------------|

Modifications

The program was relatively stable, and no modifications were implemented in 2022.

2022 Strategies

All strategies outlined in the Project Delivery Program Strategies section (see page) were co-developed and implemented by the Pathway to Zero Program. Strategies unique to Pathway to Zero and delivered specifically to DACs include:

- **Pathway to Zero reports.** These reports provide a high-level review for several DER and sustainability strategies such as photovoltaics and battery storage, demand response, electric vehicle charging, and water efficiency. The reports provide initial guidance for the facilities, including information on rebates and incentives.

Optimization/Outlook

In 2023, the Pathway to Zero Program will focus on rolling out electrification outreach activities to help public agencies and their communities identify and fund opportunities to decarbonize and increase energy resilience. The Program will launch a series of webinars and workshops targeted at multiple audiences: the public sector, workforce (businesses), and community members (residents). The series will leverage Regional Partners to create localized workshops that tackle decarbonization challenges unique to each subregion. Overall, the program will educate communities about the benefits of decarbonization and empower them to take action through SoCalREN resources as well as anticipated incoming state, federal, and private resources.

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

Streamlined Savings Pathway Program

Description

The Streamlined Savings Pathway Program is a Resource Acquisition program that was designed to fill gaps left by closed utility energy efficiency programs and to incentivize long-lasting energy efficiency measures. The program design minimizes the cost of delay caused by lengthy application review timelines and provides funding for public sector energy efficiency projects, particularly in underserved communities.

Energy efficiency savings from participating Streamlined Savings Pathway projects contribute to SoCalREN portfolio goals, state energy efficiency goals, and energy efficiency portfolio cost-effectiveness calculations.

Services

The Streamlined Savings Pathway offers the following innovative services to public agencies to accelerate the completion of energy efficiency projects:

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

The Streamlined Savings Pathway integrates seamlessly with the SoCalREN's public sector Market Support program, the Project Delivery Program, to help public agencies save energy and money, as displayed in Figure 29.

Figure 46. Streamlined Savings Pathway Project Delivery Process



Objectives

- Generate persistent and long-term electric savings (kWh and kW) and GHG emissions reductions to support SoCalREN program and state clean energy goals.

- Increase energy efficiency program participation in underserved communities by offering enhanced monetary incentives to fund energy upgrades.
- Mitigate the cost of project implementation delays for public agencies by quickly yet rigorously reviewing incentive applications.
- Reduce project delays and complexities by leveraging in-house technical expertise.

Performance

As a new Resource Acquisition sector program launched in the second quarter of 2022, Streamlined Savings Pathway focused on ramp-up activities and the development of a strong project pipeline.

Table 15. Streamlined Savings Pathway Program Performance

| | 2022 Completed Projects* | |
|-----------------------|--------------------------|-------------|
| | Savings Claimed | Underserved |
| First year net kWh | 36,568 | 67.5% |
| First year net kW | 10 | 76.8% |
| First year net therms | -101 | 35.5% |
| Lifetime gross kWh | 637,605 | 73.9% |
| Lifetime gross kW | 217 | 82.7% |
| Lifetime gross therms | -1,123 | 35.5% |

*Savings are based on forecasted construction completion timelines. Includes total savings projected for 2023 and beyond.

Table 16. Streamlined Savings Pathway Pipeline Developed for Future Years

| | Pipeline Developed | |
|--------|--------------------|-----------------|
| kWh | 10,775,851 | 29% underserved |
| kW | 811 | 45% underserved |
| Therms | 27,609 | 96% underserved |

Figure 47. City of Palmdale Cultural Center Project Savings Report



Table 17. Streamlined Savings Pathway Project Details

| Metric | #of Projects | % DAC |
|---|--------------|-------|
| Projects Installed | 6 | 80% |
| Projects Approved for Future Installation | 4 | 75% |
| Projects in Pipeline Pre-Application Submittal/Approval | 75 | 43% |

In addition to building a robust project pipeline, the program prioritized quick application processing and review to help agencies start completing projects. On average, the program completed project application technical reviews 53 percent faster than the program's 30-business day goal.

Table 18. Streamlined Savings Pathway Project Review Timelines

| Review Period | Average Number of Business Days To Complete* |
|----------------------|--|
| Technical Review | 14 |
| Application Approval | 22 |

*Excluding CPUC review and response periods

The Streamlined Savings Pathway supports energy efficiency education through marketing and outreach. To build interest in its first year, the program hosted two webinars, coordinated with Regional Partners to deliver four presentations to agencies, and developed seven unique outreach pieces.

Figure 48. Streamlined Savings Pathway Expedited Incentives Flyer

Figure 49. Conversations with SoCalREN Snapshot

Securing a SoCalREN Incentive

- Assessment:** ID EE measures, calculate savings, assess feasibility
Agency: selects measures for implementation
- Application:** Submit audit calculations, influence, M&V plan
Agency: signs incentive application, identifies funding source
- Pre-Inspection:** Project reviewer inspects existing equipment (if needed)
Agency: available to escort inspector
- Approval:** Approval to purchase and install efficiency measures
Agency: lead procurement and award construction contract
- Installation:** Submit Installation report along with contractor invoice
Agency: oversee contractor/construction
- Post-Inspection:** Final review of savings, installation confirmation
Agency: available to escort inspector
- Payment:** Incentives payment to agency
- Reporting Period:** Monitoring period to track project's realized savings (if applicable)
- Payment:** Persistence incentives payment to agency (if applicable)

Realized Benefits

- Energy Savings
- Cost Savings
- Operational Gains

Modifications

This was the first year SSP was offered, so this section is not applicable.

2022 Strategies

In its first year of operation, the program developed nearly 40 documents and tools to design and launch the program, build significant public agency interest, and develop a robust pipeline of projects. The following are noteworthy strategies from 2022:

- Coordinated with Southern California Edison (SCE) to **maximize funding and financing**. Together, SoCalREN and SCE ensured that agencies receiving incentives through the Streamlined Savings Pathway could also leverage 0 percent interest on-bill financing (OBF) from SCE for their energy efficiency projects. Metrolink became the first public agency to pursue this option, securing \$16,752 in Streamlined Savings Pathway incentives and \$19,000 in SCE OBF for HVAC improvements at their dispatch and operations center.

Figure 50. Combined Financial Resources Make Metrolink's Project Viable



- **Focused on quick energy efficiency measures** to deliver energy savings within the program's inaugural year while also building a project pipeline for future years. The program focused on retrofits that were least impacted by inflation-related cost escalations and supply chain delays, and on measures that could be installed by agency staff. This strategy targeted quick savings through technologies such as heat pump water heaters, circulating block heaters, economizer controls, and LED lighting.
- Led the **review of 70+ Capital Improvement Plans (CIP)** to identify opportunities for energy efficiency that would benefit from the program's streamlined approval process and cash incentives.
- **Tapped into water and wastewater sector energy saving potential** via targeted measure outreach and custom energy use analyses. As a result of these efforts, the program currently has an estimated 3.8 million kWh and 521 kW water/wastewater energy efficiency project savings in the program's 2023 pipeline.
- Ensured **strategic program coordination** with third-party program implementers such as the statewide Water Infrastructure and System Efficiency™ Program (SW WISE™) to ensure a united agency-facing approach and to limit duplication of program services.

Optimization/2023 Outlook

In 2023, the Streamlined Savings Pathway program's primary goals will be to deliver the projects in the 2023 pipeline and to develop a robust pipeline for future program years.

The program will adapt to changing public sector needs and the energy efficiency programs landscape. Streamlined Savings Pathway optimizations for 2023 include:

- **Revise program measure offerings** based on 2022 Title 24 updates and analyses of program measure portfolio cost-effectiveness
- **Adjust program incentive rates** as needed to ensure funding is available to meet energy savings goals and explore **enhanced incentives for fuel substitution measures**
- **Focus on education and outreach** for measures with high Total System Benefit (TSB) and measures that are least impacted by supply chain issues
- **Develop and distribute marketing and communication materials** (including case studies on completed projects) to continue to build interest in the program

External Funding Leveraged by the Public Sector: BMCTA

Description

Benchmarking Call to Action (BMCTA) received non-ratepayer funding from the California Energy Commission (CEC) in 2022 to achieve three goals: close out DER-related services which were initiated in 2021, provide AB 802 compliance support for Los Angeles County facilities, and support Los Angeles County facilities served by the Los Angeles Department of Water and Power (LADWP) with energy efficiency and DER services. SoCalREN stopped offering DER-focused BMCTA services after January 2022 as funding for that activity depleted. Supplemental funding enabled SoCalREN to provide comprehensive electric audits for facilities served by LADWP. The sub-program currently offers EE technical services to LADWP facilities owned by LA County, in support of resiliency goals.

Services

Through BMCTA, SoCalREN offered the following services in 2022:

- **Enhanced SoCalREN service for LADWP facilities:** Provided technical support services associated with two energy efficiency audits completed in 2021 and expanded audits for an additional five facilities in 2022.
- **AB 802 benchmarking regulation fulfillment:** SoCalREN ensured Los Angeles County fulfilled AB 802 benchmarking regulations, a requirement for select California facilities larger than 50,000 square feet.
- **Benchmarking data upload automation:** SoCalREN worked with utility energy providers to enable automated web services. With automatic updates to energy consumption data, LA County was better able to comply with AB 802 benchmarking regulations.

Objectives

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

1. Increase LA County's ability to meet its sustainability plan and state energy goals by providing energy benchmarking and California Building Benchmarking Program compliance support.
2. Build capacity and expertise among LA County staff about the California Building Benchmarking Program and energy use across the County's facility portfolio.
3. Help LA County make informed decisions about energy management by leveraging benchmarking data collected and analyzed through program initiatives.
4. Expand whole building energy efficiency audits and technical support to identify equipment with increased efficiency and opportunities at LA County facilities served by LADWP.
5. Identify funding opportunities for LA County projects within LADWP territory.

Performance

Table 19. Program Performance Metrics

| Benchmarking Call to Action Sub-Program Performance | | |
|---|------|-----------|
| Metric | Goal | Completed |
| AB 802 Compliance for Buildings >50K | 113 | 113 |
| Number of EE Audits | 3 | 5 |
| Number of Additional EE Technical Services | 3 | 7 |

Table 20. BMCTA Project Pipeline Developed

| kWh | kW |
|-----------|-------|
| 4,631,163 | 5,800 |

BMCTA also supported LA County with two rebate applications to LADWP for an estimated incentive of \$106,006.



Tulare Tulare County

RESIDENTIAL SECTOR

SoCalREN helps households participating in its Residential sector programs to start the journey toward a clean energy future at home. Through a comprehensive Multifamily Program and Kits for Kids, an innovative in-home education and direct install program, SoCalREN impacted more than 20,000 households in 2022.

These programs also provided benefits to the contracting professionals who grew their businesses with Multifamily Program projects, and the schools that received classroom participation grants when students successfully complete at-home Kits for Kids measure installations.

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

Overview of Residential Sector Performance

The **Multifamily Program** focused efforts on helping stabilize the market after two tumultuous years operating during the COVID-19 pandemic, ongoing supply chain challenges, and record-setting inflation. In 2022, energy efficiency retrofits were completed at 79 properties in the territory, impacting more than 16,500 households. Approximately half of the projects were completed at properties located in DAC ZIP codes; many of these projects also impacted traditionally hard-to-reach customers, including thousands of homes where English is not the primary language spoken.

The program’s Whole Building and Comprehensive Common Area paths achieved combined net energy savings of more than 5 GWh and over 75,000 therms with approximately 50 percent of the savings delivered in DACs. The savings achieved equates to greenhouse gas (GHG) emissions savings of more than 10 million miles driven by an average passenger vehicle.

With the full return of in-person school in 2022, the **Kits for Kids** team ramped up outreach efforts and expanded participation to additional school districts, achieving 100 percent of program enrollment goals. Kits for Kids engaged with 250 classrooms in eight counties and delivered energy saving kits to more than 5,700 school children.

Students were supported with interactive educational materials that guided them through in-home energy efficiency activities including installing simple, self-install efficiency measures that were provided in the kits.

Figure 51. Residential Sector Impacts

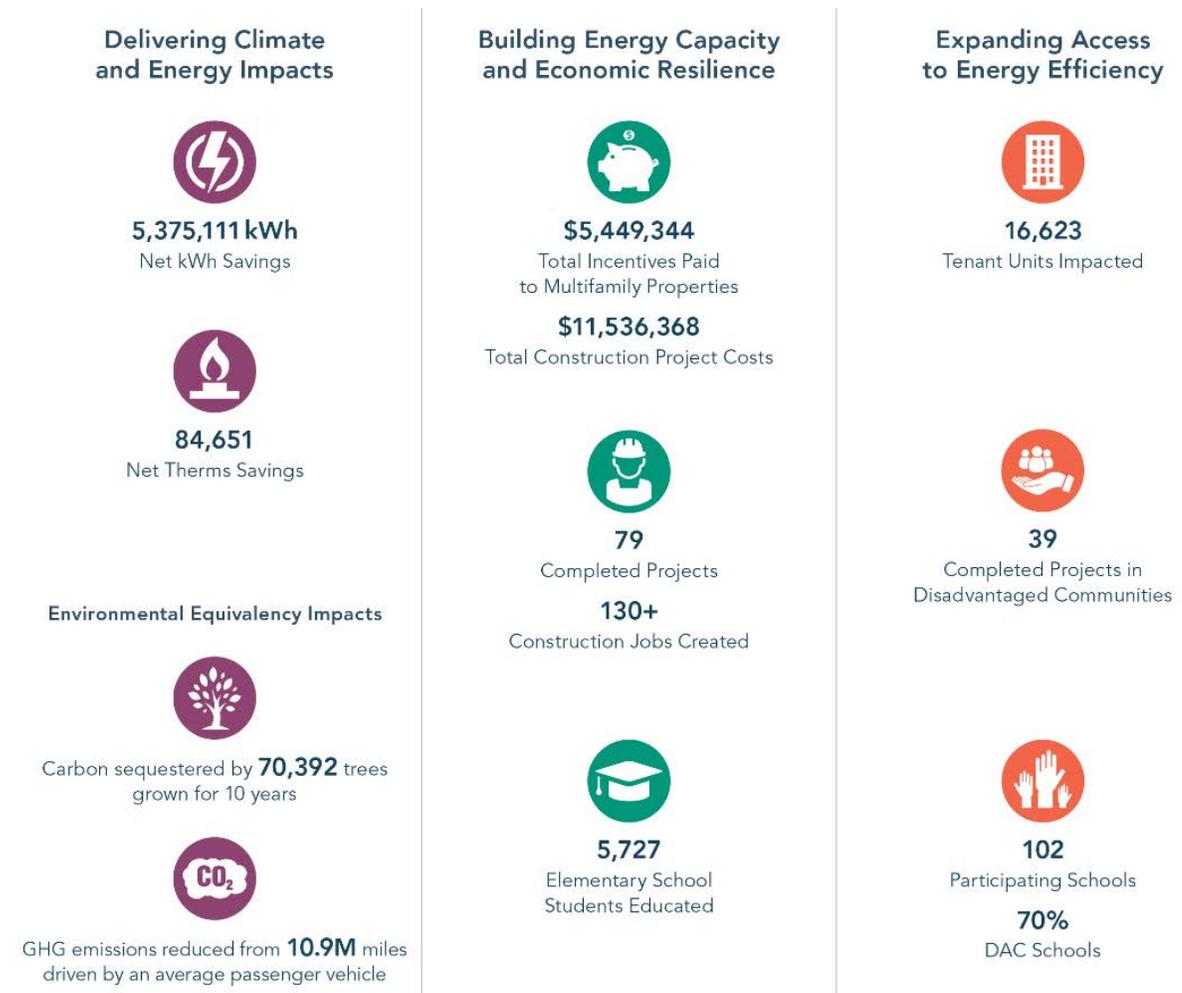


Table 21. Residential Sector 2022 Performance

| | Goal | Achieved | Percent of Goal |
|--|-----------|-----------|-----------------|
| Multifamily Program | | | |
| Number of Installed Projects | 60 | 79 | 132% |
| No. of Residential Dwelling Units Impacted | 12,000 | 16,623 | 139% |
| Energy Savings (gross kWh) | 8,034,292 | 7,033,773 | 88% |
| Demand Savings (gross kW) | 375 | 409 | 109% |
| Energy Savings (gross therms) | 466,598 | 100,164 | 21% |
| Energy Savings (net kWh) | 5,061,529 | 5,375,111 | 106% |
| Demand Savings (net kW) | 236 | 311 | 132% |
| Energy Savings (net therms) | 293,957 | 75,123 | 26% |
| Kits for Kids Program | | | |
| Energy Savings (gross therms) | - | 15,880 | - |
| Energy Savings (net therms) | - | 8,734 | - |
| Enrolled Classrooms | 250 | 250 | 100% |
| Participating Students | - | 5,727 | - |
| Percent DAC Classrooms | 50% | 70% | 140% |

Sector Modifications

While adjustments were made to outreach strategies on an ongoing basis, no formal changes were made to either Residential program during 2022.

New Program Offerings

There were no new program offerings in 2022.

Residential Sector Optimization/Outlook

There is optimism for growth in the Residential Sector over the next few years as pent-up demand combined with unprecedented funding is expected to drive increased energy efficiency activity. Continued increased emphasis on electrification will drive property owners to explore options to integrate IDSM and DERs into future facility renovations and leverage the multitude of program resources and incentives to facilitate this transition. Being fuel agnostic, SoCalREN is in an ideal position to work with customers and help develop the best energy strategy for their particular needs and act as a single point of contact and help customers access all the resources focused on this sector. SoCalREN is also in an excellent position to help coordinate worker training related to electrification measure installation. With most districts back to standard classroom education, we expect increased interest in the Kits for Kids program, particularly as more schools and districts participate and share their positive experience with others.

Multifamily Program

Description

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

The target audiences for the Multifamily Program are owners and managers of eligible multifamily properties located within the SoCalREN territory. This includes a wide range of property types, 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.

Figure 52. Sample Multifamily Program Marketing Collateral

SoCalREN 多户型计划
综合用途公共区域

以安全和简单的方式为您的物业升级, 同时保持社交距离

通过南加州区域能源网络 (SoCalREN) 多户型计划为您的物业增值, 同时降低维护成本。综合用途公共区域方法可帮助物业获得能效升级的益处, 同时最大限度地减少承包商和工作人员与租户的互动。

通过四个简单的步骤参加

- 1. 接受免费咨询**
SoCalREN团队的能源顾问将与您远程合作, 完成登记程序, 并确定具体设备。
- 2. 接受评估**
能源评估师将确定物业公共区域能效升级的机会。
- 3. 作出改进**
请持照合格承包商安装能效设备, 某些设备可自行安装 (请联系本计划, 了解更详细信息)。
- 4. 获得奖励***
根据所安装的设备, 为节约能源获得奖励。节约的能源越多, 可获得的奖励就越多!

享受益处

- 使用我们简单的登记流程, 最大限度地减少计划团队或您在现场花费的时间。
- 享受降低的运营和维护成本。
- 为区域环境改善目标作出贡献。
- 获得激励和奖励。

确认您的资格

如需参加本计划, 您的多户型项目必须符合以下标准:

- 位于南加州爱迪生公司 (SCE) 提供服务的物业内。
- 位于至少包含五套连体单元的建筑物内。
- 至少包括两种合格的能效设备, 其中一种必须是电力设备。
- 至少节约10,000千瓦时或1,000千卡能源。
- 从预订之日起12个月内完成项目并获得批准。

开始行动!

请访问网站 socalren.org/multifamily
发电子邮件 multifamily@socalren.org
打电话 (877) 785-2237

*根据项目节约的能源量提供奖励。奖励的能源节约越多, 奖励水平越高。适用计划限制条款。

socalren.org/multifamily

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 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.

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 or EnergyPro Lite modeling of energy savings.
- Project management and other staff support throughout EE projects.
- Individualized contractor training with the Program’s engineering team to ensure contractors understand the intake form and how to accurately collect necessary data and information.
- Project inspection to validate all equipment is installed and operational.
- Tenant educational materials in a variety of languages.

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.

Figure 53. Sample Multifamily Program Digital Advertising



Objectives

- **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 that include electric, gas and water efficiency measures.
- **Achieve High Participation in HTR and DAC Customer Groups:** The Program goal is to achieve at least 50 percent participation by HTR customers or properties located in DAC ZIP codes.
- **Drive SoCalREN Portfolio Cost Effectiveness:** The Multifamily Program offers a streamlined approach to achieving energy savings to ensure the overall SoCalREN portfolio maximizes cost effectiveness.
- **Drive Energy Efficiency Upgrades in All Building Types/Sizes:** The Program serves the entire SoCalREN Multifamily market, 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 to facilitate the installation of comprehensive projects.

Performance

In 2022, the Program completed Energy Assessment Reports at a total of 136 multifamily properties throughout the SoCalREN territory. The number of Assessment Reports completed is indicative of the interest in the program and project sales cycles as dozens of those properties will translate into projects that will be completed in 2023.

Table 22. Multifamily Program Performance

| Project Implementation Performance | |
|--|-----|
| Number of Completed Projects ¹⁷ | 79 |
| Percent of projects completed at properties that serve disadvantaged communities ¹⁸ | 49% |

In 2022, the SoCalREN Multifamily Program claimed over 5 net GWh and more than 75,000 net therms. The regional results by county are displayed below.

¹⁷Projects are defined by 2022 construction completed projects with installation reports submitted by Feb. 24, 2023.

¹⁸As defined by CalEnviroScreen 4.0

Table 23. Multifamily Program Regional Energy Savings Results

| County | Projects | Net kWh | Net Therms |
|----------------|-----------|------------------|-----------------------|
| Los Angeles | 24 | 1,257,181 | 29,315 |
| Orange | 10 | 506,058 | 33,749 |
| Riverside | 9 | 753,207 | 10,182 |
| San Bernardino | 28 | 2,361,816 | (8,176) ¹⁹ |
| Tulare | 2 | 271,055 | 0 ²⁰ |
| Ventura | 6 | 225,795 | 10,053 |
| Total | 79 | 5,375,111 | 75,123 |

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 2022 provided significant financial benefits.

Table 24. Financial Benefits to Multifamily Properties

| Category | Amount |
|--|---|
| Annual utility bill savings for all properties (and DACs) | \$911,075 (\$446,236 in DACs) ²¹ |
| Total value of projects completed | \$11,536,369 |
| Total incentives paid | \$5,449,345 |

The Program strives to support construction jobs. This Program goal is measured by completed projects' gross construction costs. The 2022 gross construction costs of \$10.3 million translate to 130 construction jobs supported.

Modifications

Since the therm measures for several projects initiated in 2021 were held until 2022, the program quickly became oversubscribed for therms and had to implement a cap. The program had more than 50 percent of allocated therms reserved before the 2022 program year even began. The therms cap brought the unintended result of causing some contractors and properties to cancel projects and was removed mid-year.

2022 Strategies

For 2022, the Multifamily Program deployed several strategies to support achievement of the program goals.

¹⁹ The projects in San Bernardino included fuel switching measures that led to negative therms.

²⁰ The projects completed in Tulare county included electrification projects and all therm savings are reported as kWh.

²¹ Based on U.S. Energy Information Administration average California utility costs of \$0.1800 per kWh.

Multifamily Program Outreach Approach

The Multifamily Program revisited its outreach approach in 2022, leading to a focus on the following:

- Expanding the contractor network geographically to drive projects in non-metro areas
- Build direct relationships with property owners (typically contractors are a liaison)
- Maximize existing contractor activity through ongoing training, acknowledgement, and support

Multifamily Program Email Marketing Newsletters

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

Figure 54. SoCalREN Multifamily Newsletter



Throughout the year, the contractor newsletters consistently held an open rate above 50 percent and a click rate at or higher than 2 percent. According to Constant Contact, the Multifamily Program team’s preferred email management platform, these metrics align with and perform above industry standards for email click rates and open rates.

In addition, the Multifamily Program team disseminated webinar eBlasts throughout the year promoting new contractor participation within the Multifamily Program and virtual event opportunities for participating contractors to provide feedback on the Program. Furthermore, email communications were disseminated highlighting information on the Even Access Multifamily Charge 4 All Program and the Multi-Unit Dwelling (MUD) Electric Vehicle Service Equipment (EVSE) Incentives Program.

Multifamily Program Marketing Collateral

The Multifamily Program updated seven contractor and customer facing flyers at the beginning of 2022 to align with Program updates.

- Property Owner Agreement (POA)
- Multifamily Whole Building flyer (available in English, Spanish, Simplified Chinese)
- Multifamily Cobranded Whole Building flyer
- Comprehensive Common Area flyer (available in English, Spanish, Simplified Chinese)
- Multifamily Cobranded Comprehensive Common Area flyer
- Multifamily Contractor Manual
- Project Incentive Estimation Sales Tool

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

Regional Partners

To create more Program awareness, the Program began working with four regional partners, High Sierra Energy Foundation, South Bay Cities Council of Government, San Gabriel Valley Council of Government, and San Joaquin Valley Clean Energy Organization. The Program meets with each regional partner separately to review new outreach plans, discuss upcoming events, and marketing tactics. The Program provides each regional partner with monthly social media posts and newsletter content. We also provide them with cobranded marketing flyers and other Program materials as needed to promote the Program in their region.

Optimization/2023 Outlook

The Multifamily Program has noted a marked increase in fuel substitution (i.e., electrification) projects over the past two years. In 2021, the program recorded one fuel substitution project. In 2022, this increased to seven projects—a 600 percent jump in a single year. The program expects this trend to increase in 2023 with additional funding for electrification measures coming at the state and federal level. Electrification projects have a negative impact on therms savings claimed by the Program, so any fuel sub projects require careful forecasting and planning in the context of the overall program goals.

In addition, with the implementation of the CMPA protocol for Multifamily Program projects, SoCalREN expects to provide additional engineering and administrative support to contractors and properties during 2023. Overall, the Program will expand its outreach and account management offerings during 2023, including direct outreach to architectural firms and major renovation companies. The Program will also introduce its Account Management Post-Construction Site Visit (AMP) Pilot Program to further support contractors and customers.

Kits for Kids Program

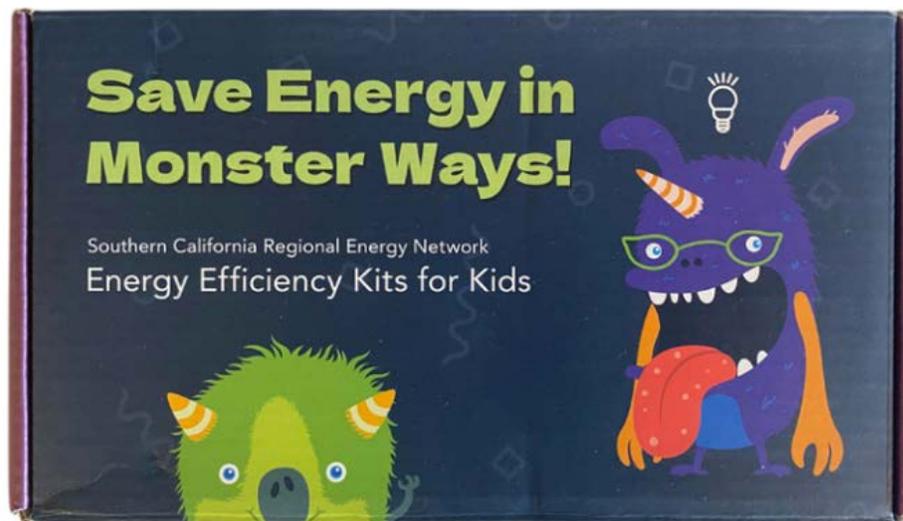
Description

Kits for Kids continued to provide energy-saving measures to families who have third- and- fourth grade students attending schools within the SoCalREN service area. In 2022, 250 classrooms signed up to participate in the program, achieving 100 percent of the program's goals.

The primary market participant for this program was the students themselves along with their Parent/Guardian and other members of their household. The program selected third and fourth grade classrooms because at these grade levels energy efficiency aligns well with other concepts the students are learning. Existing school-based energy efficiency programs offered by investor-owned utilities (IOUs) focus on other grade levels, so the Kits for Kids home-based energy efficiency education program does not duplicate IOU programs.

Each participating student received a Kit from the program, at no cost, filled with a set of measures to help provide energy savings for each household. Participating students receive energy-efficient items at no cost that can help their families save energy and money. In addition to the energy and cost savings achieved by the student, Kits for Kids provided educators with a classroom incentive grant. Kits for Kids generates energy savings and provide relief to families and educate future household decision-makers to continue prioritizing energy efficiency (EE) in the future.

Figure 55. Kits for Kids Box



The free measures are designed to help households save energy and money. The at-home activity is intended to build on what has already been taught in the classroom. The activity is designed to help the student make connections between concepts

learned through third and fourth grade science class and how the members of their household use energy at home, in a fun, hands-on fashion. Students have access to a free, online home-based educational activity with games, puzzles, and a tip sheet. These are designed to educate the participating student and other household members about energy efficiency and the positive financial and environmental impacts associated with participating and committing to EE behaviors.

Students return the postcards to the teachers who aggregate the information in an online information form. This includes information on the type of home they live in, the existing light bulbs they are replacing, as well as what measures from the kit they installed.

Services

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

The insert for students encourages them to go on an energy-saving adventure online to learn more about energy, how their family uses it, and more ways to save. If 65 percent of the students within a given participating classroom return the completed postcard to their teachers, their classroom will receive a \$1,000 incentive grant. The Program is in the process of receiving teacher submission forms to provide QA/QC and distribute the incentive grant funding.

Objectives

The program objectives of Kits for Kids are as follows:

- Generate energy savings through the installation of measures in the homes of students participating in the Kits for Kids program.
- Provide financial relief to families/households through both energy cost savings and the no-cost measures provided to households.
- Educate students, parents, and guardians about energy efficiency to help household members make informed decisions now, and to encourage the continuation of EE behaviors by the students in the future.
- Drive climate action within residential communities.
- Reward students for participating by giving a classroom grant. This \$1000 grant can be used by each participating teacher to help fund educational materials, supplies, field trips, and other experiences that help students learn and engage.

Performance

SoCalREN met the 2022 goal of enrolling 250 classrooms to participate in the Kits for Kids Program. The 250 classrooms are in 53 school districts and 102 schools in eight counties throughout the SoCalREN territory. The Program distributed kits to 5,872 participating students.

Table 25. Kits for Kids Program Performance

| | |
|--------------------------------------|--------|
| Participating Counties | |
| Participating School Districts | 53 |
| Participating Schools | 102 |
| Classroom Enrollments | 250 |
| Students in Participating Classrooms | 5,727 |
| Gross Therms | 15,880 |
| Net Therms | 9,528 |

Modifications

After making a series of modifications in 2022 to improve the program, Kits for Kids was relatively stable in 2022. Lessons learned in 2022 will be applied as new strategies in 2023.

2022 Strategies

Throughout 2022, SoCalREN used a variety of strategies to encourage participation. This included targeting third and fourth grade teachers to participate in the Kits for Kids Program. Program staff worked with SoCalREN's Public Agency Regional Partners that have had historically low participation in utility programs in disadvantaged communities (DAC) and rural hard-to-reach (HTR) school districts. In addition, program staff conducted direct outreach to school districts in SoCalREN territory.

The Regional Partners helped facilitate classroom enrollment in the program. Because of their location and affiliations with local municipalities, these organizations were in a unique position to target DAC and HTR participants. The four regional partners are:

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

The Regional Partners helped to promote the program to local school districts and facilitated introductions to school districts. The program accelerated its growth into additional geographic areas in 2022. The number of participating counties increased by 33 percent, School Districts by 112 percent and schools by 48 percent, with the primary recruitment and participation focus occurring in DACs. The top 25 participating school districts in 2022 are represented in Figure 56.

Figure 56. Kits for Kids Top 25 Districts

To further support DAC and HTR participants, the program provided in-language content targeting specific communities who are often overlooked in energy efficiency programs. Providing educational materials, activity sheets, and measure instructions in key languages spoken throughout the region helped customers directly connect with the content and concepts and fostered connections between parents/guardians and students who worked on the activities together. Based on this effort, these communities likely adopted energy efficiency at a higher level than their historic participation levels. Methods of direct outreach included:

Program Email Marketing Campaigns

A total of 15 email marketing campaigns were developed and distributed out to over 5,000 school contacts (teachers, principals, administrators, and superintendents). In addition, the following counties were targeted to encourage participation in the Kits for Kids Program: Inyo, Mono, Riverside, San Bernardino, Ventura, Tulare, Kings, Los Angeles, and Orange. Outreach was completed to inform schools within the SoCalREN territory of the Kits for Kids Program, the benefits of participating, and how to enroll in the Program.

These email outreach efforts led to great success in driving readers to the Kits for Kids section of the SoCalREN website. In particular, the Kits for Kids enrollment page received 1,856 total pageviews in 2022, with a significant amount of pageviews deriving from our email campaign efforts. Open rates were between 20–60 percent and click rates were between 1–20 percent.

Direct Phone Canvassing

The expanded program outreach team conducted direct phone outreach to 3,000 contacts at districts and schools. Follow up emails with program information were then sent to 1,077 contacts.

Table 26. Kits for Kids Marketing and Outreach

| Tactic/Indicator | Details | Performance |
|-------------------------|----------------------------|---|
| Email Marketing | 15 emails 5,000 contact | Average 40% open rate Average 10% click rate |
| Website | Pageviews counted | 1,856 (Average 154/month) |
| Direct phone canvassing | Number of calls | 3,000 |
| Follow-up emails | Number of emails | 1,077 |

Addressing Market Barriers

Market barriers faced by Residential customers in the SoCalREN service area are addressed through Kits for Kids:

- Households in the targeted areas have a historic lack of participation in energy efficiency programs and may be unaware of the availability of such programs. By providing a no-cost entry point to energy efficiency that is accessible to all members of the household, Kits for Kids helps address this critical market barrier.
- Due to inflation and increased energy costs, many households in the Disadvantaged Communities (DAC) and Hard-to-Reach (HTR) areas served by SoCalREN currently face economic hardship. The measures and incentives provided by Kits for Kids can help alleviate this burden while providing information and guidance on how households can continue to save on an ongoing basis.

Optimization/Outlook

During the Kits for Kids Program's first two years, the program worked steadily to perform outreach, gain traction, and earn the trust of local schools. Now in year three, the program is able to become more selective in its participation requirements, allowing SoCalREN to place additional resources into outreach within targeted DACs and in underserved districts (i.e., Title I schools). In addition, the program has learned several best practices over the last two years; a critical change the program will make in 2023 is to focus outreach efforts at the district level whenever possible, to maximize impact and to help streamline the administrative aspects of the project (including participation approval) for classroom teachers.

*Diamond Bar Los Angeles County*

WORKFORCE EDUCATION AND TRAINING SECTOR

The SoCalREN Workforce Education and Training (WE&T) Sector continues to contribute to the development of the skilled workforce needed to achieve the growing demands of California's energy efficiency market. SoCalREN's WE&T services encompass a wide range of offerings from mentoring high school STEM students to providing training, technical assistance, and support to small and diverse businesses to help them participate in the clean energy economy.

Collaborations with academic institutions, community-based groups, and other partners help expand the program's reach and impact. SoCalREN's WE&T sector is continuously helping to build a skilled and diverse workforce that can assist in the transition to a more sustainable and resilient region.

Overview of WE&T Sector Performance

Program offerings continued to expand their reach and enrollment to disadvantaged communities, the main target population for programming in 2022. The WE&T Sector, through various degrees of programming, targeted participants including contractors, in-school youth, and opportunity youth/adults to begin their transition into the clean energy sector.

Individual technical assistance and resource support was the key to success for participants to receive a clear overview of transitional pathways for businesses and individuals.

Table 27. WE&T Sector 2022 Performance Summary

| Achievement | Total |
|--|----------|
| Contractors Trained | 262 |
| ACES Student Participants | 101 |
| GPC Cohort #4 | 10 |
| Certifications Obtained by ACES and GPC Participants | 16 |
| Internship Dollars Earned by ACES Students | \$46,817 |
| Educational Institution and Industry Partners | 12 |
| Regional Workforce Alliance Members | 22 |

The SoCalREN WE&T Sector achieved vital performance goals through a comprehensive approach of providing the necessary training, services, and resources needed to succeed. Through an individualized approach, WE&T sector programming customized available resources and support for each participant or business.

Through the **E-Contractor Program**, contractors received technical assistance ranging from capacity building, bonding assistance, RFP assistance, and other coaching services. In 2022, E-Contractor trained 262 small and diverse contractors on topics ranging from Title 24, GPRO, Access to Capital, and many others.

The **Architecture, Construction and Engineering Students (ACES) Pathway Program** served 101 students in Title I designated high schools. Students receive training through dual enrollment at the community college level; the program also provides supportive services through various partners customized to the needs of each student. Student internship participation for Summer 2022 included 30 students, with 6 receiving industry software certification training.

The **Green Path Careers Program**, in its second full year of programming, assisted 10 participants, all categorized as opportunity youth and adults, encompassing transitioning foster youth, and individuals who are unhoused, justice impacted, or hard-to-reach/disadvantaged.

Sector Modifications

The sector was stable in 2022 and did not require any modifications.

New Program Offerings

No new programs were offered in 2022.

WE&T Sector Optimization/Outlook

Throughout the previous two years, the country's landscape has altered. In response to the pandemic, the federal government passed six COVID relief packages totaling \$4.5 trillion over the course of two administrations. Grants, contracts, and loans have been

given out to assist people, businesses, local governments, educational institutions, and public health systems in recovering from the detrimental consequences of COVID. Recently, a bipartisan \$1.2 trillion infrastructure bill (Infrastructure Investment and Jobs Act) and Inflation Reduction Act were also passed as a targeted program for renewable energy deployment, economic development, and rebuilding initiative. As this funding makes its way into communities, skilled workers—particularly workers with energy efficiency and electrification skillsets—will be more necessary than ever. SoCalREN foresees an increased need for skilled worker training and support in the coming years.

SoCalREN Regional Workforce Alliance 2022 Members

California African American Chamber of Commerce (CAACC)
 Build Los Angeles Community College District (BuildLACCD)
 California Hispanic Chamber of Commerce (CHCC)
 California State University, Long Beach (CSULB) Institute for Innovation & Entrepreneurship
 City of Los Angeles Council District 9
 County of Los Angeles Board of Supervisors
 County of Los Angeles ISD Environmental & Energy Services
 Crenshaw Chamber of Commerce
 East Los Angeles Community College Engineering and Technologies Department
 Greater Los Angeles African American Chamber of Commerce (GLAAAC)
 HUB Cities Consortium
 Los Angeles Clean Tech Incubator (LACI)
 LA County Department of Consumer and Business Affairs Office of Small Business (OSB)
 Los Angeles Local Development Corporation (LALDC)
 National Association for the Advancement of Colored People (NAACP)—Inglewood/South Bay Chapter
 National Association of Minority Contractors/Southern California Chapter (NAMC)
 National Electrical Contractors Association—Los Angeles (NECA—LA)
 Southern California Edison
 SoCalGas®
 Swinerton Builders
 U.S. Green Building Council Los Angeles (USGBC—LA)
 Zlate-Z

WE&T Program

Description

California’s ambitious environmental and energy saving goals require a rapid expansion of the state’s clean energy workforce. SoCalREN’s WE&T sector programs are uniquely designed to meet the needs of a wide variety of stakeholders who can help address this issue—students and teachers, employers and employees, established businesses and new start-ups. By working with a diverse range of partners and participants, SoCalREN is making life-changing impacts for businesses and individuals.

“...organizations such as ACES which has helped me become more career oriented and helped me get real world experience.”

Middlebury College Biomedical Engineering student and ACES Participant

Services, Objectives, and Strategies

ACES



Services

The Architecture, Construction, and Engineering Students (ACES) Pathway Program provides Title 1 high school students with dual enrollment opportunities, bridging the gap to higher education and providing hands-on training and experience in energy efficiency and clean energy technologies. The program aims to prepare the next generation of professionals in the architecture, construction, and engineering industries for careers in the clean energy sector and support the growth of a diversified clean energy workforce in Southern California.

Figure 57. ACES Services



Objectives

ACES promotes employment in the energy sector to underrepresented groups to diversify the workforce and create a talent pipeline preparing youth for in-demand jobs

and helping to meet the growing demand for skilled workers. The ACES Program achieves this through:

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

Strategies

- **Internships and Mentoring:** There are continued opportunities for paid internships, which provide hands-on experience to help build knowledge and skills. Mentoring is equally important to continue developing a better understanding of the energy sector.
- **Workshops:** Continued workshop opportunities to provide students with exposure to the energy sector and accessible content knowledge.
- **Outreach:** Conduct outreach and recruitment efforts to encourage underrepresented populations to consider careers in the energy sector. Organize career fairs and networking events to connect students with players in the energy sector and educate them on the various opportunities available.
- **Curriculum:** Developing curriculum and educational materials that support the development of the skills and knowledge required for energy-related careers.

E-Contractor

Services

The E-Contractor Program provides training and certification for small, diverse contractors to enter the energy efficiency sector. The program aims to provide contractors with the knowledge and skills to successfully bid, design, and install energy efficiency systems, including HVAC, insulation, lighting, and renewable energy systems.

E-Contractor is designed to support the growth of the clean energy workforce in Southern California by providing contractors with access to training, resources, and technical assistance. Contractors participating in the program receive a certificate of completion and are listed on the SoCalREN contractor website, which provides visibility to potential customers and helps grow their businesses.

Figure 58. E-Contractor Services



Objectives

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

Strategies

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

- **Building Capacity:** Technical assistance helps to build the knowledge, skills, and capacity needed to succeed in the industry. This includes training on new green technologies, business practices, and industry standards, as well as support in bidding, project management, and financial management.
- **Overcoming Barriers:** Small and diverse contractors often face barriers such as lack of access to capital, technical expertise, and access to resources. Technical assistance helps contractors overcome these barriers by meeting with each enrolled participant on a one-on-one basis to conduct assessments.

Green Path Careers



Services

The Green Path Careers (GPC) Program provides training and job placement services for opportunity youth adults looking to start or advance their careers in the energy efficiency and clean energy industries. Opportunity youth and adults includes

transitioning foster youth, and individuals who are unhoused, justice impacted, or otherwise disadvantaged. The program’s goal is to help bridge the gap between job seekers and employers in the region and support the growth of the clean energy workforce.

Figure 59. Green Path Careers Services



Objectives

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

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

Strategies

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

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

Performance

Table 28. WE&T Program Contractor Training and Coaching

| Course Name | Number of Contractor Participants |
|---|-----------------------------------|
| E-Contractor IBEW Training | 22 |
| E-Contractor Academy Level II—Building and Estimating | 30 |
| E-Contractor Academy Level II—Project Scheduling | 31 |
| E-Contractor Academy Level II—Project Management | 25 |
| E-Contractor Academy Level II—Cash Flow Management | 17 |
| E-Contractor Academy Level II—Project Close-Out | 28 |
| SoCalREN Multifamily Program Intro Training | 38 |
| Title 24 Training | 31 |
| GPRO Two-Day Training | 16 |
| Access to Capital Workshop | 24 |
| Total | 262 |

Table 29. ACES Certification Data

| Certification Type | Number of Students Certified |
|--------------------|------------------------------|
| CSWA Virtual | 7 |
| CSWP Virtual | 6 |
| Total | 13 |

Table 30. 2022 ACES Internship Data

| | Number of Interns | Total Hours Worked | Total Wages Earned |
|----------------------|-------------------|--------------------|--------------------|
| In-Person Internship | 16 | 1919.5 | \$30,789 |
| Virtual Internship | 14 | 999.25 | \$16,028 |
| Total | 30 | 2918.75 | \$46,817 |

Table 31. ACES Course Enrollment

| Course Title | Enrollment by High School | | | | Total |
|---|---------------------------|-----------|-------|---------------|-------|
| | Alhambra | Southland | STEAM | Verdugo Hills | |
| Manufacturing and Industrial Technology | 22 | - | 14 | - | 36 |
| Engineering Design and Graphics 101/111 | - | - | - | 30 | 30 |

| Course Title | Enrollment by High School | | | | Total |
|-------------------------------------|---------------------------|-----------|-----------|---------------|------------|
| | Alhambra | Southland | STEAM | Verdugo Hills | |
| Engineering Design and Graphics 102 | 17 | 18 | - | - | 35 |
| Total | 39 | 18 | 14 | 30 | 101 |

Table 32. GPC Participation

| | Participants |
|-----------------------|--------------|
| GPC Cohort #4 | 10 |
| Certifications Earned | 6 |

Modifications

The program was relatively stable in 2022 and did not require any modifications.

Optimization/Outlook

SoCalREN’s WE&T Program continues to optimize with a clear emphasis on DAC/HTR to better prepare individuals and businesses for the energy sector and support the growth of the clean energy economy in Southern California. This emphasis leads to economic growth and opportunities for job creation and economic development. The WE&T Sector helps to create sustainable economic opportunities and reduce economic disparities leading to social equity. WE&T Sector continued optimization strategies include:

- **Collaborating with Key Stakeholders:** Continued and expanding partnerships with organizations, community-based organizations, educational institutions, and employers to align programs with the needs of the local workforce.
- **Training:** Continue to leverage technology to make programs more equitably accessible and effective by expanding online courses, virtual workshops, and digital resources to be accessed at any time. This also complements participants’ hands-on experience such as internships, apprenticeships, and project opportunities.
- **Career Pathways:** SoCalREN WE&T will continue to optimize programming around clear career pathways, mapping out the skills and knowledge individuals need that can progress from entry-level positions to more advanced roles in the energy sector.
- **Small Business Contractor Support:** Small and diverse contractors play a critical role in California’s climate action plans, and it is essential to provide them with support and resources to help them grow and succeed.



Rancho Mirage Riverside County

APPENDIX A: SOCALREN PORTFOLIO SUPPORTING DATA

Please review the file “Final SoCalREN 2022 Annual Report.xlsx,” uploaded to the California Energy Data and Reporting System (CEDARS, located at <https://cedars.sound-data.com/>), to view 2022 Supporting Data.

Final SoCalREN 2022 Annual Report

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



Chino Hills San Bernardino County

APPENDIX B: SOCALREN PROGRAM SUPPORTING DATA

Public Sector Programs Marketing and Outreach

SoCalREN's communications efforts in 2022 were focused on **encouraging enrollment** for eligible public agencies and **increasing the engagement and capacity of agencies already enrolled in the program**. The following communications-related metrics were tracked and reported on throughout the year to measure success.

| Target/Indicator | Details | 2022 Status | Complete? |
|---|--|-------------|-----------------|
| Agency registration (indicator) | Number of not-yet-enrolled agencies that registered for SoCalREN network toolkit at socalren.org/join | 11 | N/A (indicator) |
| Complete 20+ outreach activities | Total number of outreach activities delivered (includes all outreach events such as conferences, virtual webinars, Regional Partner events, and Twitter Chats) | 23 | ✓ 115% |
| Develop 40+ unique informational and educational outreach materials | Total number of educational and outreach materials developed and shared (includes all unique informational materials such as newsletters, case studies, eblasts, fact sheets, and RPAR specific materials) | 44 | ✓ 110% |

| | | | |
|-------------------------------------|---|-----|---|
| Maintain >80% customer satisfaction | % average customer satisfaction based on respondents to annual survey | 89% | ✓ |
|-------------------------------------|---|-----|---|

This report details the 2022 activities in support of these metrics and recommendations based on the results of these efforts.

Agency Registration

SoCalREN's network toolkit offering has now been up and running since early 2020. Below are a few key metrics since launching the toolkit (and agency registration, which is how agencies sign up to access the network toolkit).

| | 2020 | 2021 | 2022 |
|--|-------|------|-------|
| Registration web page views | 1,090 | 633 | 1,203 |
| Network toolkit logins | 135 | 150 | 72 |
| Network toolkit resource views/downloads | 108 | 86 | 53 |
| Number of new resources added | 44 | 5 | 8 |

The following items were the top most downloaded/viewed resources from the network toolkit in 2022:

1. Canva Instagram template (9)
2. Canva Facebook template (5)
3. Identifying energy projects guidebook (4)
4. Canva Twitter template (4)
5. SCR New Incentives 2022 Webinar (4)

Outreach Activities

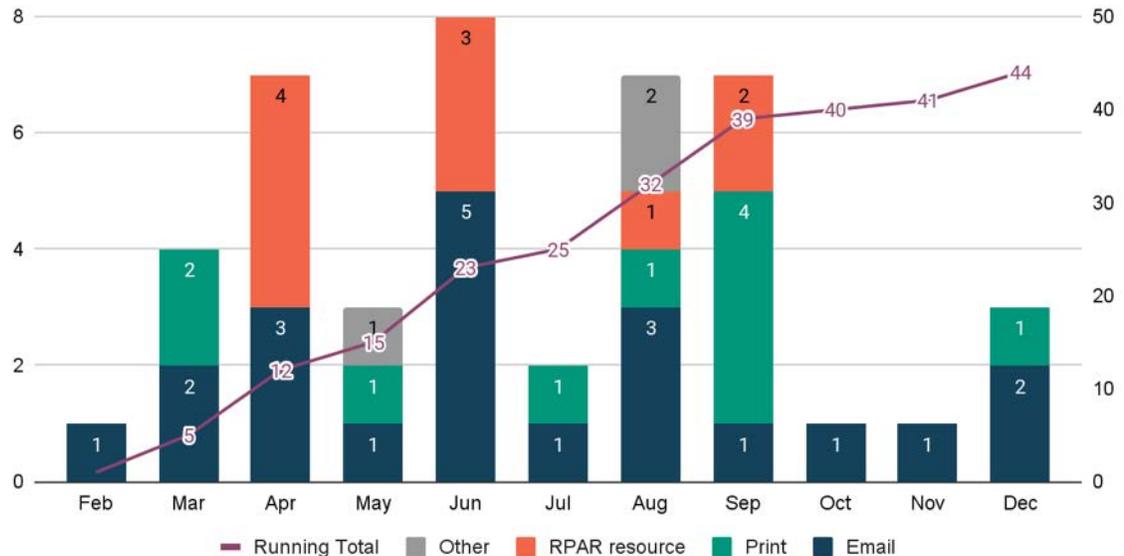
| Event Name | Activity Type | Date |
|--|---------------|---------|
| SBCCOG Energy Management Working Group | Meeting | 1/26/22 |
| SBCCOG Partners Meeting | Meeting | 2/9/22 |
| SGVCOG EENR Committee Meeting | Meeting | 2/16/22 |
| SGVCOG EWG Meeting | Meeting | 2/22/22 |
| Public Works TAC | Meeting | 2/28/22 |
| GCCOG Energy Working Group Meeting | Meeting | 3/8/22 |
| SBCCOG Partners Meeting | Meeting | 3/9/22 |

| Event Name | Activity Type | Date |
|--|--|-------------------|
| Planning Directors Technical Advisory Committee | Meeting | 3/24/22 |
| New SoCalREN Incentive Programs: Same no-cost services - now with incentives! | Webinar | 3/30/22 |
| AWWA Spring Conference 2022 | Conference: Attendance | 4/12/22 |
| SGVCOG EWG | Meeting | 4/26/22 |
| Manhattan Beach Earth Month Webinar: Go Green (and Save Green!) | Webinar | 4/27/22 |
| Municipal Green Building Conference & Expo 2022 | Event Booth | 5/20/22 |
| Twitter Chat | Webinar | 6/8/22 |
| Energy Working Group 6.14.22 | Meeting | 6/14/22 |
| To Savings and Beyond! | Webinar | 6/29/22 |
| Agencies Just Wanna Have Funds: Level Up your EE Projects with Funding Opportunities | Webinar | 6/30/22 |
| SGVCOG EWG Meeting | Meeting | 7/19/22 |
| American Council for an Energy-Efficient Economy (ACEEE) 2022 Summer Study on Energy Efficiency in Buildings | Conference: Attendance, Speaker | 8/21/22 - 8/26/22 |
| GCCOG EWG Meeting Q3 | Meeting | 9/13/22 |
| SBCCOG - El Segundo Community Webinar | Webinar | 9/19/22 |
| California Climate and Energy Collaborative (CCEC) Forum | Conference: Attendance, Event Booth, Speaker | 9/21/22 - 9/22/22 |
| Hermosa Beach: Go Green (and Save Green!) with Water & Energy Saving Actions | Webinar | 10/12/22 |
| SGVCOG Energy Working Group | Meeting | 10/18/22 |
| Everything You Wanted to Know About EV Charging (But Were Too Afraid to Ask) | Webinar | 12/6/22 |

While SoCalREN began attending in-person events again in 2022, we found that attendance had not returned to pre-pandemic levels. And although the amount of in-person conferences we attended were significantly less than previous years, SoCalREN was always met warmly from existing Energy Champions and potential agencies. Thanks to successful abstract proposals, SoCalREN showed a strong presence as an industry expert at the CCEC Forum and the ACEEE Summer Study. We also had a record number of RPAR events conducted this year and set multiple records for agency registrations for “Conversations with SoCalREN” webinars. The record number of agency registrations could be due to agencies resonating strongly with the topics chosen (financial, incentives, EV charging).

Unique Outreach Materials

This year, we exceeded our goal of 40 unique outreach materials. The most frequent material types were email campaigns and print materials, although we developed a significant number of email article templates, social media post templates, and customized region-specific materials for regional partners (more than in previous years). A breakdown of unique materials developed by month can be found in the chart below.



In 2022, we continued to deliver a successful monthly email newsletter, used email marketing to promote webinars and events, and developed print and other materials to promote new programs and service areas. The team also developed a significant number of revamped print materials that focus on our value-add for agencies (i.e. services), rather than explaining our program structure.

Recommendations for 2023

- Maintain up-to-date materials based on energy team needs
- Tailor messaging to program priorities, including emphasis on decarbonization
- Leverage regional partners to create timely, region-specific outreach materials
- Add picture protocol to site visits for case study purposes

Customer Satisfaction

SoCalREN has an annual goal of achieving at least 80% customer satisfaction, measured via an annual satisfaction survey. The customer satisfaction survey was distributed starting in Q3, achieving an 89% satisfaction rate.

Recommendations for 2023

- Decide on process and team lead early in 2023 for streamlined survey roll-out
- Assess opportunities to make the survey more user-friendly via survey logic, removing unnecessary questions, and/or using a more robust survey tool
- Consider sending a separate survey or using survey logic to have a shorter survey for newly enrolled or re-engaged agencies that don't have a lot of project work yet
- Consider adding optional fields for short comments
- Consider reframing messaging to agencies, based on feedback that calling it a "satisfaction survey" makes them feel pressured to respond a certain way, and gave the impression that the survey would be assessing their specific project manager (not overall programs)

Regional Partner Collaboration

SoCalREN's regional partners played an essential role in achieving the program's outreach and enrollment deliverables in 2023. Seven of the 13 public agencies enrolled were in collaboration with a regional partner. Regional partners provided additional outreach support in communicating important updates for public agencies including information on SoCalREN programs, incentives, and educational and professional development opportunities. Regional partners also helped develop and deliver pilot initiatives to their respective regions, bringing customized energy efficiency resources closer to their communities. Pilots included a Facilities Equipment Inventory, the Energy Resilience Action Plan, and residential EE assessments (eSGV).

In 2023, the SoCalREN communication team will focus on providing general resources and support to the regional partners, while empowering them to take a leadership role in developing communications resources that align with their community's needs and preferences.

Services-Focused Messaging Refresh

In early 2022, the team conducted focus groups with the energy and network services teams and with our regional partners to gauge how well our communications resources were helping them to discuss SoCalREN with public agencies. Based on focus group feedback, we conducted a review of existing collateral and updated 21 materials to more clearly communicate the value SoCalREN provides to participating agencies. This update initiative took several months, but helped to ensure that SoCalREN's collateral accurately reflected the key messages that resonate with our target audiences.

New Program Roll-Out

In 2022, SoCalREN began offering direct incentives through our Metered Savings and Streamlined Savings Pathway Programs. The communications team developed marketing resources to help share this exciting new offering, while being conscientious

of potential concerns around fiscal responsibility (no “free money!!” type messaging here!).

SoCalREN also began collaborating with Los Angeles County’s new portfolio of clean transportation programs, SoCal EVen Access, in 2022. In particular, we partnered with their new Public Power-Up program, which offers free EV chargers to public facilities near multifamily properties that commit to energy efficiency retrofits. We developed SoCalREN communications that communicated this exciting new collaboration and funneled projects to LA County’s new program.

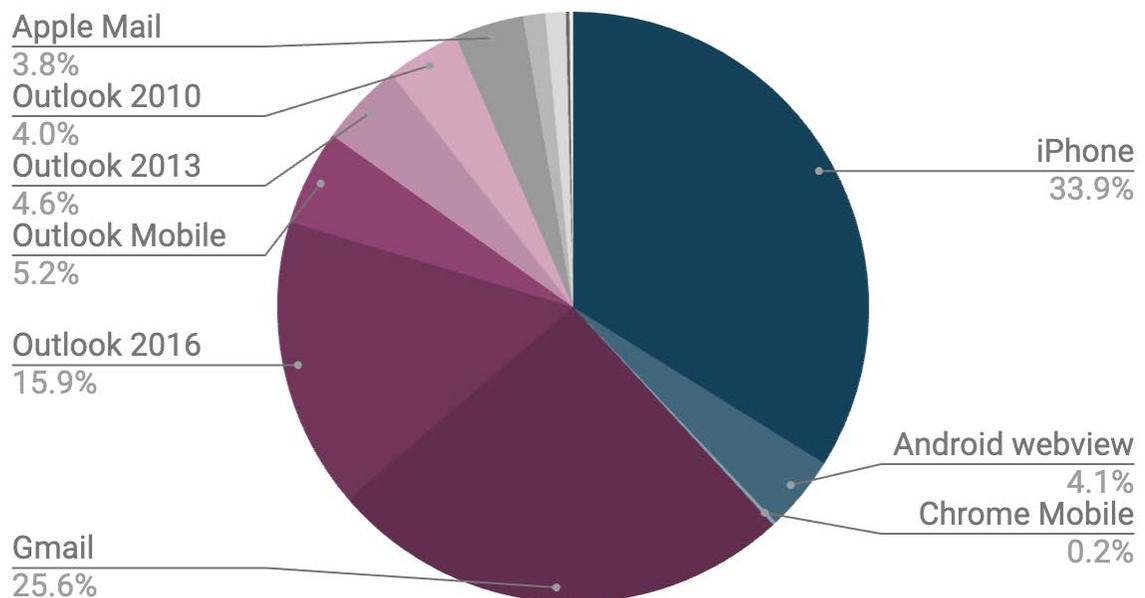
Email Campaigns

Audiences

SoCalREN’s mailing list currently has 1,414 subscribers (as of 1/3/2023). The primary contact (as listed in the customer relationship management program) for each enrolled agency is added to the mailing list upon enrollment, ensuring 100% of enrolled agencies receive educational materials and information about the programs. We also receive mailing list subscribers 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. The pie chart below shows SoCalREN audience email clients in detail, with plum and gray pie wedges indicating desktop email clients, and navy pie wedges indicating mobile email clients.

SoCalREN Email Audience Email Clients

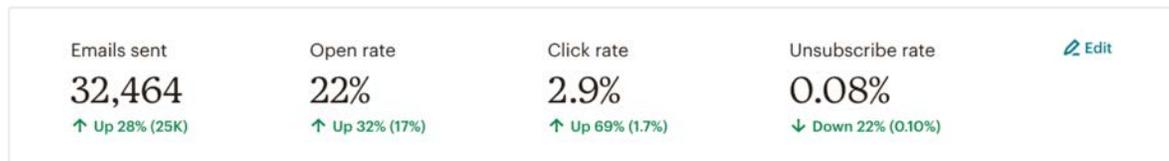


SoCalREN should continue to use email templates that are responsive and display clearly on desktop and mobile platforms, particularly in Gmail and iPhone.

SoCalREN has 307 contacts, or 26% of our audience, that are highly engaged with our content and often open and click our emails (based on MailChimp criteria). Of our highly engaged users, 31% are enrolled public agency representatives. Other highly engaged user types include regional partners, technical consultants, and other SoCalREN stakeholders, and agencies that have registered for our network toolkit but are not yet fully enrolled in SoCalREN. SoCalREN should keep these engaged audiences in mind and develop email content that appeals to their interests and priorities.

Email Campaigns

SoCalREN's email marketing improved in effectiveness across the board in 2022 (see summary graphic below). We sent more emails, which were opened more often and clicked on more often than in 2021, all while reducing the number of contacts who unsubscribed. Overall, this indicates that we are on the right track with SoCalREN's email marketing strategies.



Despite fluctuations in the number of emails we sent over the course of the year (varying from 1–7 emails per month), we maintained a consistent open rate (around 20%) and click per unique open rate (around 10%). These are fairly standard open and click rates, according to MailChimp 2022 benchmarking data. A comparison of SoCalREN's open rate and click-to-open rates to industry averages is outlined in the table below.

| Organization/Industry | Open Rate | Click Rate |
|--|-----------|------------|
| SoCalREN 2022 Newsletter Average | 23.1% | 3.90% |
| Overall average benchmark (source: Mailchimp) | 22.33% | 2.62% |
| Government benchmark (source: Mailchimp) | 28.77% | 3.99% |
| Nonprofit benchmark (source: Mailchimp) | 25.17% | 2.79% |
| Professional services benchmark (source: Mailchimp) | 21.94% | 2.55% |

Top Campaigns

Based on open rate, the following campaigns / subject lines were most successful in 2022:

1. NEM 3.0 ESCO Partner Feature, “What does NEM 3.0 mean for your solar project?” (43.40%)
2. NEM 3.0 ESCO Partner Feature, “NEM 3.0 is coming soon. Now’s the time to lock in your solar project!” (38.31%)
3. December newsletter, “Happy Holidays from the SoCalREN team! | December 2022” (31.16%)
4. Supercharged Incentives Eblast, “SoCalREN agencies can now receive 150% incentive rates for EE projects!” (26.37%)
5. Supercharged Incentives Eblast (Oct. version), “It’s not too late for SoCalREN agencies to get 150% incentive rates for energy projects!” (25.40%)

Most of these successful email campaign subject lines convey themes of sharing a time-sensitive opportunity with agencies. SoCalREN should continue to use variations of this theme when possible to encourage audiences to open emails.

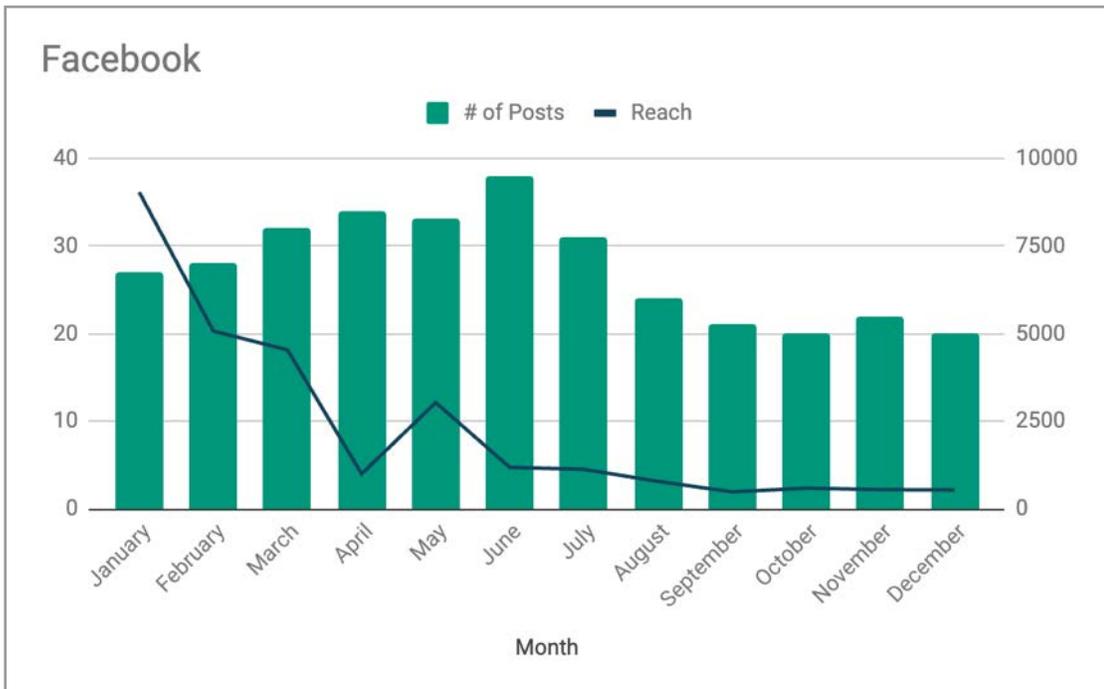
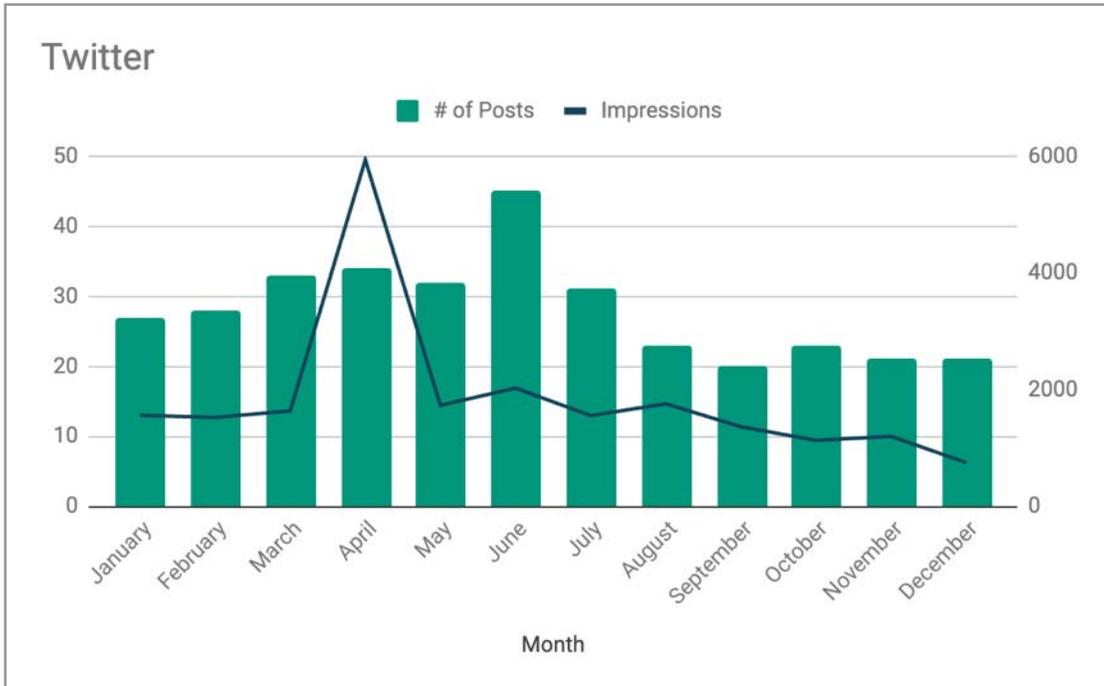
Based on total campaign clicks, the following campaigns were most successful in 2022:

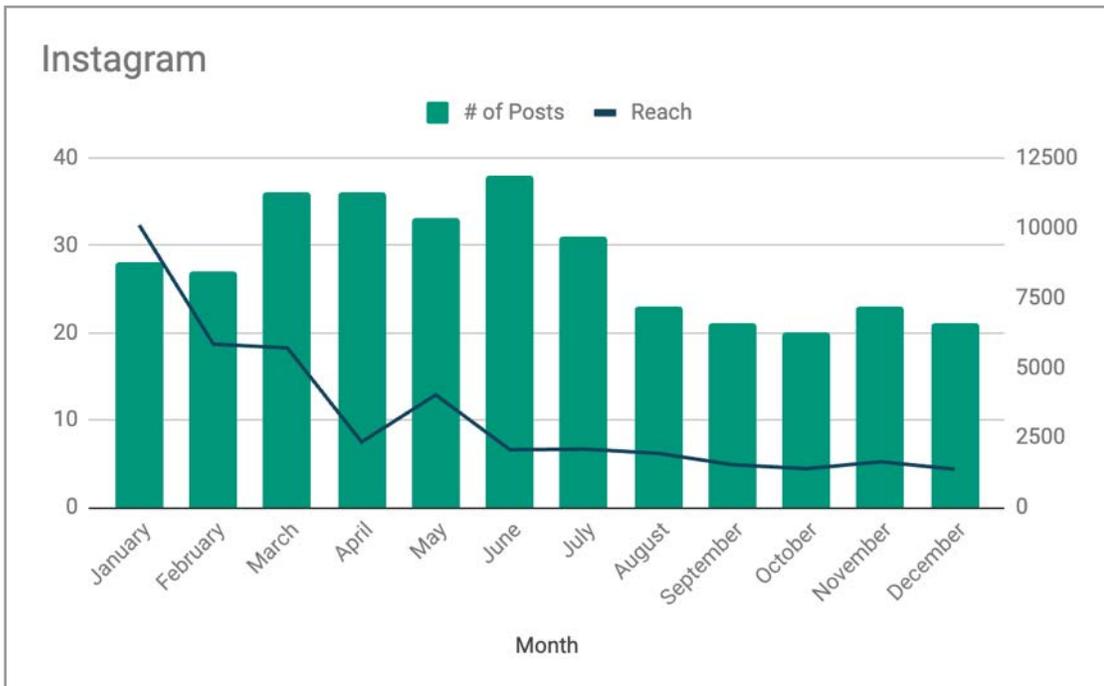
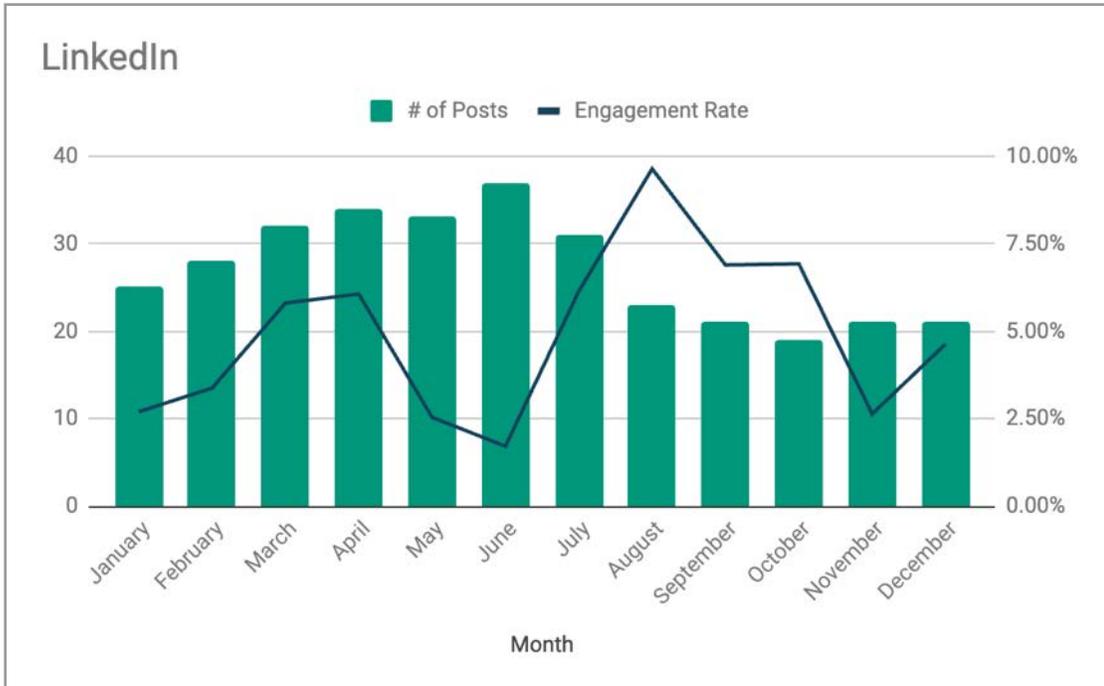
1. NEM 3.0 ESCO Partner Feature (897 clicks)
2. March 2022 Newsletter (372)
3. November 2022 Newsletter (24)
4. December 2022 Newsletter (203)
5. Supercharged Incentives Eblast (199)

While newsletters performed well in terms of link clicks, there are many links within each newsletter so the link clicks for each campaign are spread across many different resources and content areas. However, the large number of overall clicks in newsletter campaigns is a good indicator that the content we are sharing in monthly newsletters is relevant to our audience.

Recommendations for 2023

- A/B test subject lines to confirm best structure and focus area
- Consider sending fewer newsletters and more frequent opportunity announcement and/or single topic email campaigns
- Consider sending segmented campaigns based on engagement behavior and contact type to boost engagement and provide more relevant content
 - Consider sending segmented email to contacts who aren’t opening our emails to ensure they want to continue receiving emails (improving list quality and reducing spam flag risks)





Top Public Agency Programs Posts

| Platform | Top Post Text | Graphic(s) | Impressions | Link |
|----------|---------------|------------|-------------|------|
|----------|---------------|------------|-------------|------|

| | | | | |
|-----------------|--|--|--------------|-----------------------------|
| <p>Twitter</p> | <p>🎉 Congrats to @PalmdaleCity 🎉 for receiving 3 Platinum Beacon Spotlight Awards from @InstLocGov for their sustainability efforts. We're proud to help Palmdale reach their #energyefficiency goals! Read about our work with Palmdale here: bit.ly/3svRZXi pic.twitter.com/gZ8PWFrhVr</p> |  <p>The graphic features the City of Palmdale logo at the top, which includes a stylized sun and the text 'CITY OF PALMDALE a place to call home'. Below the logo, it says 'Congrats!' and 'Platinum Awardee'. Underneath, it lists 'AWARDED FOR:' followed by three categories: 'Natural gas savings', 'Agency electricity savings', and 'Sustainability best practices', each with a corresponding icon.</p> | <p>463</p> | <p>link</p> |
| <p>Facebook</p> | <p>Join the San Gabriel Valley Council of Governments (SGVCOG) as they host two virtual community workshops on Feb. 23! SGVCOG staff will provide an overview of the short- and long-term transit options designed to enhance communities and the lives of residents, commuters, and visitors!</p> <p>Register for the community workshop here: https://www.sgvcog.org/transit-study-community-input"</p> |  <p>A photograph showing several people sitting on a yellow bus, engaged in conversation. The focus is on a woman in the foreground and a man next to her.</p> | <p>3,562</p> | <p>link</p> |
| <p>LinkedIn</p> | <p>🎉 Congratulations to the City of Palmdale 🎉 for receiving three Platinum Beacon Spotlight Awards from the Institute for Local Government for natural gas savings, electricity savings, and sustainability best practices.</p> <p>We're proud to have helped the City in their energy efficiency journey! Read about our work with Palmdale here: https://bit.ly/3svRZXi</p> |  <p>This graphic is identical to the one in the first row, celebrating the City of Palmdale's achievements in natural gas savings, electricity savings, and sustainability best practices.</p> | <p>519</p> | <p>link</p> |

| | | | | |
|------------------|--|--|-----------|-----------------------------|
| <p>Instagram</p> | <p>Last week we attended the Net Zero Conference! We were excited to hear from all the brilliant minds working towards impactful climate action. Looking forward to creating more energizing partnerships with the folks we met!</p> <p>#YourSoCalREN #NetZeroConference #NetZeroFuture #IPCCreport #climateaction #climateequity #ESG #climateresilience #sustainability #energyefficiency #renewableenergy #cleanenergy #California"</p> |  | <p>62</p> | <p>link</p> |
|------------------|--|--|-----------|-----------------------------|

Our top posts related to SoCalREN Public Agency Programs all included themes of connecting to our partners, stakeholders, and/or enrolled agencies. In 2023, SoCalREN should continue to use social media as a way to support our partners and showcase our enrolled agencies’ successes.

Recommendations for 2023

- Consider creating and managing a LinkedIn group for enrolled agency contacts to share with and learn from each other

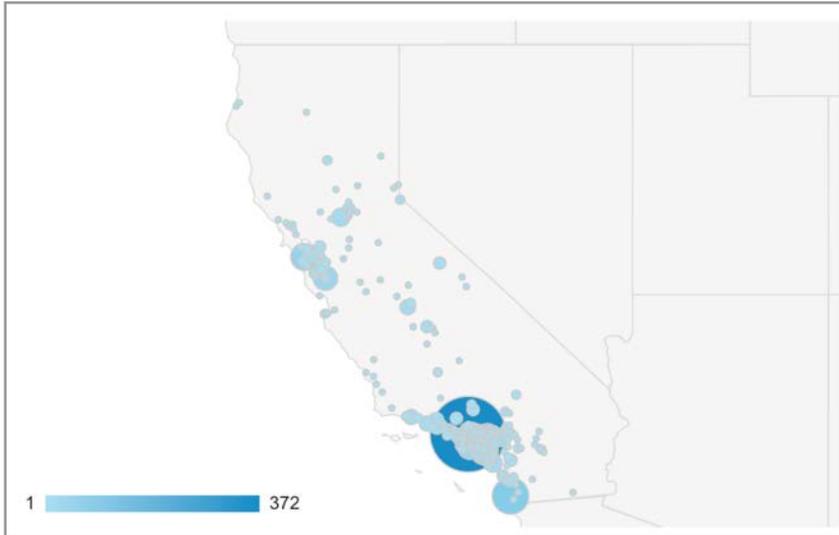
Website

The Energy Coalition managed the Public Agency Programs pages of the SoCalREN website in 2022. During 2022, we managed major updates throughout the public sector section of the website to incorporate the latest program information and key messages. Unless otherwise noted, all data below is for website traffic Jan 1 through Dec 31, 2022, with browsing sessions that included at least one public agency programs page of the SoCalREN website. This segment of SoCalREN website browsing activity represents about 20.24% of all 2022 SoCalREN website users.

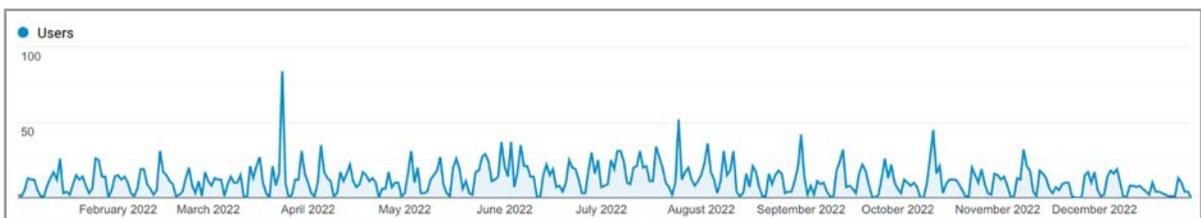
Audiences

The majority of website visitors (90.34%) come from the United States. Within the United States website visitors, there was a larger spread across the country in 2022 than in previous years. About half (50.71%) of users come from California, with the remaining United States traffic spread across Virginia (9.54%), Washington (7.28%),

Wyoming (6.4%), Texas (5.82%), and Iowa (4.85%), and 32 other states (<3% each). This continues the trend of previous years of expanding geographic reach, which may be due to (1) the increase in remote work due to COVID-19, and (2) SoCalREN’s increasing visibility and name recognition nationwide. The map featured below shows California users by location and indicates that, despite our growing geographic reach, SoCalREN website users still tend to be in our target geographic area.



The number of users peaks during the week and drops dramatically during the weekend (see chart below). 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.



Approximately 83% of website visitors are new visitors. 87% of website visitors view the website on desktop browsers, 13% are on mobile or tablet platforms. 97% of website visitors default browser language is English. Bearing these demographics in mind, SoCalREN should continue to design webpages to be inclusive and responsive on all devices.

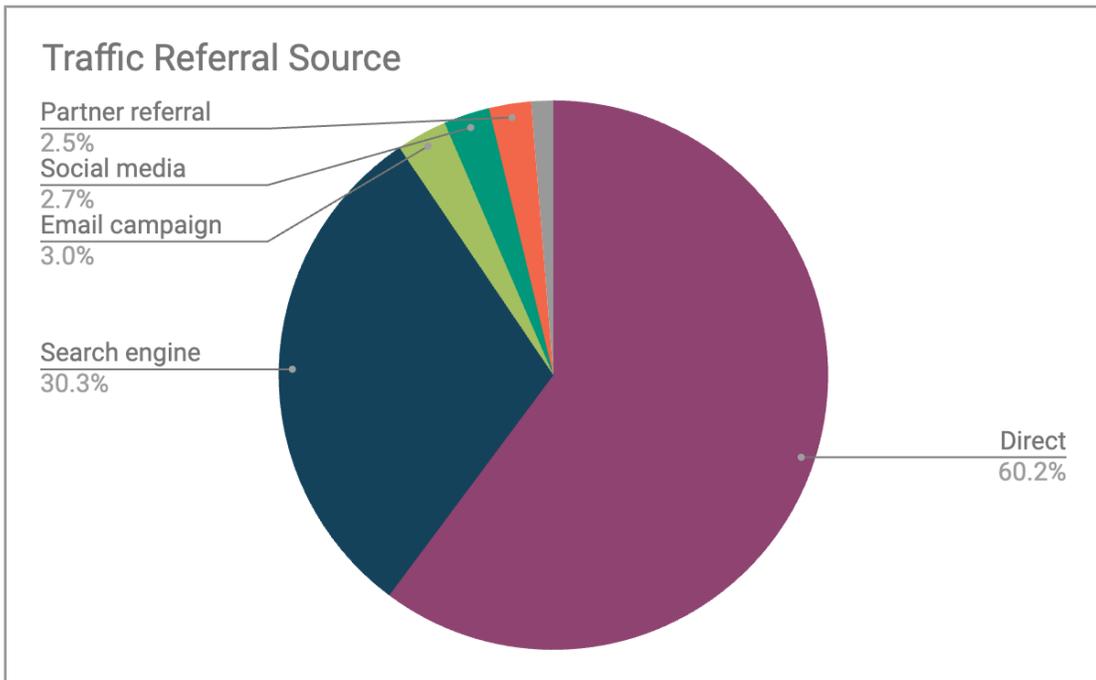
Behavior

In 2022, we had a 49.79% bounce rate, meaning users viewed one page for 0 seconds with no interaction. This bounce rate falls in the “average” range for typical websites ([source](#)). Details of typical browsing session duration can be found in the table below.

| Session Duration Bucket | Sessions | Pageviews |
|-------------------------|----------|-----------|
| 0-10 seconds | 2,762 | 3,218 |
| 11-30 seconds | 376 | 1,125 |
| 31-60 seconds | 274 | 1,053 |
| 61-180 seconds | 452 | 2,341 |
| 181-600 seconds | 427 | 3,062 |
| 601-1800 seconds | 319 | 3,123 |
| 1801+ seconds | 144 | 7,790 |

Our top pages were the SoCalREN agencies homepage (13.86% of page views), the SoCalREN homepage (11.67%), the COVID information page (8.14%), the public agency programs about page (5.73%), and the public agency services page (5.25%).

Most website traffic (59.13% of users) came directly to the SoCalREN website (i.e. entered "socialren.org" into the address bar). The sources for other user traffic are summarized in the pie chart below.



Recommendations for 2023

- Consider review and update of public agency pages to better promote registration and reduce “friction” that may stand in the way of email newsletter and toolkit registration sign-ups
- Regularly (monthly) track website analytics to more closely monitor the effect of various communications efforts on website traffic