

2024 Joint Cooperation Memo (JCM)

**Southern California Regional Energy Network (SoCalREN),
Southern California Edison (SCE), Southern California Gas
Company (SoCalGas[®]), Inland Regional Energy Network
(I-REN), and Tri-County Regional Energy Network (3C-REN)**

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I. OVERVIEW OF COORDINATION APPROACH

Recent federal and state policy activity is expected to drive growth in California’s energy efficiency (EE) market in the coming years. With this growth, there is a need for increased collaboration between California’s EE portfolio administrators (PAs) to ensure the most prudent and impactful use of ratepayer dollars in the delivery of customer programs. To that end, the Southern California (SoCal) PAs—Inland Regional Energy Network (I-REN), Southern California Edison (SCE), Southern California Gas Company (SoCalGas[®]), Southern California Regional Energy Network (SoCalREN), and Tri-County Regional Energy Network (3C-REN)—engaged in a series of structured discussions by sector to refine and enhance ongoing program overlap collaboration protocols, documented in this 2024–2025 Joint Cooperation Memo (JCM).

All SoCal PAs were actively involved and engaged, with 100 percent participation from I-REN, SCE, SoCalGas, SoCalREN, and 3C-REN, including both direct PA and third-party implementer staff. SCE and SoCalREN facilitated the meetings, which were conducted in a virtual/online format. To balance process consistency across portfolios with customized protocols to meet unique sector needs, each PA identified key regulatory and management staff who attended all meetings, supplemented by sector subject matter experts (SMEs). It should be noted that PAs presented information on all programs currently offered or approved for launch in 2024 by D.23-06-055, including programs without potential for overlap, to provide a complete picture of the market.

Discussion topics in each meeting included strategies for mitigating customer confusion and double-dipping that have been successfully implemented in the past and ideas for potential future strategies to consider. All PAs highly value providing their customers/constituents with a smooth, positive participation experience, and noted their desire to continue developing coordinated efforts with a customer-centric design approach that maximizes ratepayer benefits.

The PAs agreed upon a baseline portfolio-wide approach to collaboration comprising a series of structured Portfolio Administrator Sector Coordination (PASC) meetings; a notification process for program entrances, significant changes, and closures; and high-level guidelines for streamlined customer hand-offs. The SoCal PAs anticipate the outcome of D.23-06-055 Ordering Paragraph (OP) 32 will further provide additional guideposts to help evolve this coordination document.

The concepts presented in this document are intended to provide consistency across program collaboration activities; however, the processes described herein are *not* intended to dictate market activities or how individual PAs or third parties operate their programs. A structured, ongoing sector-based coordination approach allows for flexibility in customizing and refining processes to maximize transparency between PAs and to avoid or mitigate ratepayer risk associated with program overlap¹. In addition to the general collaboration framework described below, nuanced sector- and program-level strategy details are provided in the *Strategies by Sector* section of this document. Additional required tables, program summaries, and confirmation of adherence to REN requirements as per D.23-06-055 are included as appendices to this document.

¹ While OP 32 calls for, among other things, the need to define the term “overlap,” for the purpose of this JCM “overlap” refers to programs from more than one PA that have overlapping geographies and serve the same customer segment. This definition may be updated following the submission and approval of the joint advice letter required per OP 32.

A. Portfolio Administrator Sector Coordination (PASC) Meetings

The SoCal PASC meetings represent a baseline for ongoing coordination that is constructive, collaborative, and effective in mitigating the effects of program overlap in the delivery of energy efficiency programs throughout the region. Regular check-ins will allow PAs to provide mutual support if program or customer issues arise; for example, if a program’s participation is falling or a PA needs to mitigate off-track activities, discussion during a PASC meeting could provide suggestions to address the issues. Facilitation will be handled on a volunteer basis by PA staff, with PAs contributing to facilitation efforts if desired. Additional details regarding PASC meetings are noted below in Figure 1.

Figure 1. PASC Meeting Structure

| | |
|---------------------|---|
| Frequency | <ul style="list-style-type: none"> • PASC meetings will occur on a regular schedule and follow a structured format. • Meeting scheduling will be transparent and informed by each PA’s availability. • Each sector has determined the frequency with which they plan to conduct PASC meetings; these details are shared in the <i>Strategies by Sector</i> section of this document. |
| Attendees | <ul style="list-style-type: none"> • Attendees will ideally include at least one direct representative from each PA organization. • Third-party implementers as well as PA Policy Leads can be included at the discretion of the managing PA based on meeting agenda content to ensure efficient use of resources. • Meetings will prioritize a virtual approach to foster inclusivity across the region. When possible or in conjunction with other in-person activities, PAs can hold in-person or hybrid meetings depending upon PA availability. |
| Agenda | <ul style="list-style-type: none"> • Topics discussed in PASC meetings will include, but are not limited to, program entry, exit and amendments (changes) that may impact how the programs possibly conflict or compete with each other (duplication), PA staffing, key customer contact updates, customer confusion, successes that are repeatable through best practices, and potential overlap with new market trends or policy changes. • Additional topics as guided by PA input. • A sample of a possible PASC meeting agenda template is provided as Appendix C. • All PAs will observe anti-trust guidelines and safety requirements in conducting PASC meetings. Each meeting will begin with the communication of both standard anti-trust messaging and a safety message from the facilitating PA. |
| Facilitation | <ul style="list-style-type: none"> • The PASC meeting facilitator² will contact all SoCal PAs by e-mail two weeks prior to the PASC meeting to request items for inclusion in the agenda. • Completed agendas will be delivered to PAs one week prior to the scheduled meeting date. • Notes and follow-up items will be distributed within two business days of the meeting. |

B. Program Updates Outside of PASC Meetings

Program Changes and Closures

The intent of the PASC meetings is to allow PAs to communicate non-confidential information about their programs on an ongoing basis. Therefore, most minor changes to processes or other programmatic

² SoCalREN administrative and regulatory staff will initially support facilitation of PASC meetings; other SoCal PA staff may participate in PASC facilitation in the future as desired.

updates can typically be shared during the next scheduled PASC meeting. However, in some instances, providing updates between PAs may be necessary to ensure all PAs are informed and can share accurate program information with customers.

Individual PAs should use best judgement when there are significant changes to measures, incentives, segmentation, or eligibility requirements. This would warrant communication as soon as practicable. To facilitate standardization of information sharing between PAs, an **optional** Program Change Memorandum document template is provided as Appendix B. Any subsequent questions regarding the program change in question can be discussed in a future PASC meeting.

New Program Entrants

To ensure the timely flow of information between PAs regarding the entrance of new programs, the following procedures will be followed when such program triggers occur. This process is designed to curtail customer confusion by ensuring that individuals who make direct contact with customers (e.g., program managers, marketing staff, etc.) understand the details of all programs. JCMs will not be updated out of cycle.

Figure 2. Process for New Program Entrants

| | Local and/or Third-Party Programs | Statewide Programs |
|------------------|--|---|
| Trigger | Advice Letter for new program is approved; IP and CAEECC presentation complete. | |
| Meeting 1 | Managing PA schedules initial meeting with overlapping SoCal PA leads only | Managing PA schedules initial meeting with other CA PA leads only |
| | Purpose: 1.) Introduce program and have initial discussions on how their programs should and will be coordinated. | |
| Meeting 2 | Managing PA schedules meeting to include 3P teams + overlapping SoCal PAs. | Managing PA schedules meeting to include 3P teams + all CA PAs. |
| | Purpose: 2.) Review program in detail with overlapping PAs and 3P implementers. 3.) Resolve any overlapping issues that might be identified in Meeting 2. | |

C. Customer Referrals

Instances may occur where customers are eligible for more than one program. In addition, the customer relationship does not necessarily end when one PA provides a referral to another PA’s program. For example, one PA’s technical assistance program could refer a customer to another PA’s program to pursue incentives for a specific scope, while continuing to receive ongoing technical support for other scopes.

- Resource programs with complementary opportunities
- Non-Resource programs that lead to resource opportunities
- Resource programs

There may be cases where customers are not eligible for a PAs program or are “stranded” customer projects. Factors include:

- Project Fuel Type
- Whether the project is not located within a Disadvantaged Community (DAC) and/or is classified as Hard-to-Reach (HTR)Project cost-effectiveness

Sectors will cooperatively develop supplemental workflows and coordination strategies for customer referrals during future PASC meetings as needs arise. Please see sector level for referral discussion.

II. STRATEGIES BY SECTOR

A. Agriculture

Southern California PAs plan to offer a total of nine individual programs and two statewide programs for the Agriculture sector during 2024–2025. Local IOU programs offered by SCE and SoCalGas as well as the programs planned for launch in 2024 by SoCalREN and 3C-REN support and/or provide incentives for energy efficiency retrofits at existing facilities. Programs at risk of overlapping include the IOU agriculture programs; solutions were outlined during JCM development discussions and are noted below. Statewide Agriculture Sector programs target new construction³; Neither SoCalREN nor 3C-REN will offer programs targeting new construction.

Agriculture Sector PASC Meetings

Southern California PAs offering Agriculture sector programs tentatively plan to hold 60-minute Portfolio Administrator Sector Coordination (PASC) meetings every two months during 2024. Assuming an effective meeting structure that evolves in efficiency over the year, the sector expects to move to Quarterly PASC meetings in 2025.

Data Sharing Protocols

As the SoCalREN and 3C-REN programs are not yet launched, the PAs agree that Data Sharing Protocols for the Agriculture sector programs will be an agenda item in future 2024 Agriculture PASC Meetings. This will ensure that protocols put in place for new programs meet current legislative and regulatory requirements and PA guidelines regarding information security. The transfer of confidential customer data will comply with the data sharing guidelines set out by the Commission in D.23-02-002.

Prior Participation

The REN will incorporate into their process a prior participation survey to understand what EE programs the customer has participated in or is currently participating in, what type of projects and what measures if the information is readily available. This will aid in assessing if there is a program overlap and avoid duplicative efforts.

Presenting Available Programs

1. Understanding the customer’s need will determine what program(s) may be relevant to the customer.
2. The REN will present all applicable and available EE programs to the customer.

³ CPUC defines “new construction” as where equipment is installed in either a new area or an area that has been subject to a major renovation, to expand capacity of existing systems, or to serve a new load.

3. The REN will bring in other PA programs to further discuss customer options if needed.

Customer/Project Referral

If a customer explores a program that is other than what the REN is offering, a referral will be made to the applicable program implementer through an e-mail and introduction between the customer and the applicable program and/or implementer.

Customer Confusion and Double-Dipping Mitigation Tactics

In 2023, a market potential study of the agriculture sector conducted by SoCalREN found that 721 customers throughout the territory meet SoCalREN’s definition of small-to-medium⁴ and are thus potentially eligible for SoCalREN’s Agriculture programs and services. Current budget levels will allow SoCalREN to reach only a small percentage of this market; therefore, close coordination with other PAs offering complementary agriculture programs and services will be crucial in supporting customer needs. Rather than addressing an issue of overlap, Agriculture PAs should work together to reach a customer base whose participation is often limited by geographic and language barriers as well as financial constraints. Ideas and potential solutions discussed included the following:

- AG-1.** SoCalREN’s program eligibility is small and medium-sized³ Agriculture businesses, ineligible customers would be funneled to 3C-REN and/or the IOU program(s).
- AG-2.** SoCalREN and 3C-REN Agriculture Market Support programs planned for launch in 2024 will coordinate with IOU or IOU 3P implementers in a complementary fashion.
- AG-3.** The RENs will coordinate with the IOUs to determine the best participation result for single-fuel customers (i.e., REN program or funnel to IOU single-fuel program).
- AG-4.** SoCalREN will route customers identified as indoor agriculture customers seeking Market Support services in Ventura, Santa Barbara, and San Luis Obispo Counties to 3C-REN.
- AG-5.** PAs will re-evaluate the program landscape if the proposed indoor horticulture deemed measure package is approved.

B. Commercial

SCE and SoCalGas have a long history of working together to provide comprehensive EE services to the wide range of Commercial sector customers present in the market. Currently, more than two dozen local and statewide IOU programs are available to businesses located in the SCE and/or SoCalGas service territories with the majority of programs falling within the Resource Acquisition segment. Southern California RENs will enter the Commercial sector in 2024 with the launch of SoCalREN’s Resource Acquisition and Market Support programs, along with 3C-REN’s cross-cutting Public/Commercial Marketplace technical assistance Market Support segment program and Commercial Marketplace NMEC Equity segment program.

⁴ SoCalREN defines “small and medium businesses” as having annual non-coincident peak demand of less than 50 kW and less than 250 kW respectively.

Commercial Sector PASC Meetings

The SoCal PAs tentatively plan to hold 60-minute Portfolio Administrator Sector Coordination (PASC) meetings on a quarterly basis until the SoCalREN and 3C-REN programs are launched, subject to change. At that time, PAs will reassess and move to a bi-monthly schedule if necessary.

Data Sharing Protocols

Since the SoCalREN and 3C-REN Commercial programs are not yet launched, PAs have an opportunity to establish processes built on best practices and the experience gained through the implementation of other programs. Described below, many of the double-dipping mitigation tactics discussed by the SoCal Commercial sector PAs involve the transfer of customer data, therefore a discussion of protocols surrounding Commercial customer account data, PII, etc. is anticipated by PAs to be an ongoing agenda item in future 2024 Commercial PASC Meetings. The transfer of confidential customer data will comply with the data sharing guidelines set out by the Commission in D.23-02-002.

Prior Participation

The REN will incorporate into their process a prior participation survey to understand what EE programs the customer has participated in or is currently participating in, what type of projects and what measures if the information is readily available. This will aid in assessing if there is a program overlap and avoid duplicative efforts.

Presenting Available Programs

1. Understanding the customer's need will determine what program(s) may be relevant to the customer.
2. The REN will present all applicable and available EE programs to the customer.
3. The REN will bring in other PA programs to further discuss customer options if needed.

Customer/Project Referral

If a customer chooses to explore a program that is other than what the REN is offering, a referral will be made to the applicable program implementer through an e-mail and introduction between the customer and the applicable program and/or implementer.

Customer Confusion and Double-Dipping Mitigation Tactics

During the Commercial sector JCM development meeting, PAs identified the eligibility and participation limitations associated with certain programs and outlined a plan for transparent communication and coordination to prevent duplication of efforts. This transparency between PAs regarding outreach and enrollment is central to mitigating customer confusion and double-dipping within the Commercial sector.

- CM-1.** SoCalREN's Commercial programs are exclusive to Small/Medium or HTR customers. 3C-REN's cross-cutting Public/Commercial Marketplace NMEC program is not exclusive but focuses on targeting and outreach efforts with DAC/HTR customers. 3C-REN's cross-cutting Public/Commercial technical assistance program also is not exclusive but focuses on DAC/HTR customers and community-serving critical facilities.
- CM-2.** When transferring data about pipeline/enrolled projects, RENs could do the initial send of data for IOUs to bounce, rather than vice-versa for a smoother process with cybersecurity and reduced transfer of customer PII.

- CM-3.** Maintain ongoing transparency with 3PP to share pipeline/enrolled customers and avoid duplication of efforts. REN program budgets are limited so developing and sharing lists on a regular agreed-upon basis will not be burdensome or challenging.
- CM-4.** PAs will continue to explore faster and easier ways to share information about customer targets. This will require some trial-and-error between PAs and will be an evolving process.
- CM-5.** The existing account validation processes used by 3C-REN and SoCalREN to verify eligibility for SCE and/or SoCalGas Residential customers could be used to verify eligibility and prevent double-dipping for Commercial customers.
- CM-6.** Sharing enrollees or participants can ensure that the programs are discussing coordination and maximizing customer participation. PAs noted that it is possible that the same customer can be served by two or more programs without "duplication." Overlap, depending on the project and programs involved, may be in the best interest of ratepayers. Close coordination among PAs is essential so that any overlap does not result in *wasteful* duplication.

C. Cross-Cutting Codes and Standards

SoCal PAs do not expect to experience any issues related to program overlap for the new Cross-Cutting Codes and Standards sector. In addition, REN budgets for this sector are limited; therefore, coordination activities will be consolidated with other activities, when possible, to minimize resource impacts. As regional local government entities, I-REN, SoCalREN, and 3C-REN will be actively involved in and transparent with one another regarding Codes and Standards matters in the shared portions of their territories. IOU PAs will continue to actively support improved code compliance both through their own programs and statewide activities. SoCal PAs tentatively plan to hold 60-minute bi-monthly Codes and Standards PASC meetings, subject to change. Current and planned activities for Codes and Standards include:

- CS-1.** As efficiency standards and measure specifications continue to evolve, PAs will maintain open discussion about opportunities to mitigate any potential programmatic impacts.
- CS-2.** SCE has previously supported SoCalREN in delivering training in support of improved code compliance; SCE will enthusiastically do more of this in 2024 with SoCalREN as opportunities arise, as well as supporting activities through I-REN and 3C-REN portfolios.
- CS-3.** SoCalREN, 3C-REN, and I-REN third-party implementation teams are actively engaged with IOUs as well and will support efforts to ensure that on-the-ground staff support compliance with evolving codes and standards.

D. Cross-Cutting Finance

SoCalREN will offer two Cross-Cutting Finance sector programs—one for public agencies and one for small HTR Agriculture sector customers. These programs will be delivered in conjunction with SoCalREN’s Public and Agriculture sector Market Support programs, and associated funds will often be used to finance projects that will receive eventual incentives from complementary IOU programs. Therefore, any discussions regarding SoCalREN’s Finance offerings will be held during ongoing Public and Agriculture PASC meetings. PA Finance sector program managers will be invited to attend these PASC meetings at PAs’ discretion based on agenda topics.

E. Cross-Cutting Workforce Education & Training

Critical to the success of every program offered by every PA is a skilled workforce that is able to grow and adapt with the market during the clean energy transition, and that prioritizes equity and the creation of career pathways that lead to real opportunities. All five SoCal PAs administer Workforce Education & Training (WE&T) programs and deliver workforce development services in support of these priorities within their communities. PAs have historically worked together to maximize WE&T resources.

Cross-Cutting WE&T Sector PASC Meetings

Previously, WE&T sector PAs held quarterly check-in meetings where they exchanged information on upcoming offerings. Beginning in 2024, the SoCal PAs tentatively plan to hold 90-minute WE&T PASC meetings every two months, subject to change. Assuming an effective meeting structure that evolves in efficiency over the course of the year, the sector expects to transition back to quarterly meetings at a later date.

Data Sharing Protocols

The services provided through Cross-Cutting WE&T sector programs generally will not involve the use or transfer of IOU customer data. If such issues arise, PAs will discuss at a future PASC meeting.

Customer Confusion and Duplication Mitigation Tactics

As noted above, the WE&T sector does not serve customers in the traditional sense; therefore, issues related to customer confusion and double-dipping are not anticipated to occur. To ensure that WE&T opportunities are geographically distributed and well attended, PAs will provide cooperative support. Key ideas and thoughts discussed by PAs included:

- WE-1.** All PAs agree to share training calendars and, when appropriate, share information about training opportunities with program trade allies or other stakeholders.
- WE-2.** SoCalREN will work closely with both IOUs on planned energy efficiency training as it launches the E-Contractor Academy stand-alone program in 2024.
- WE-3.** SCE shared details on a new approach the IOU is taking to support heat pump installations. The Contractor Demand Building program works with licensed contractors and their employees, providing a single day of installation training and a free heat pump to install at home. This approach was of great interest to the PAs and SCE agreed to share details on program activity during future PASC meetings.

F. Public

SoCalREN has offered its signature Public sector program for more than a decade, evolving from a single offering in 2013 to a multi-program portfolio serving more than 230 active public agency participants in 2024. 3C-REN's cross-cutting Commercial and Public sector market support program provides technical assistance to commercial customers and agencies in the Tri-County region. I-REN's Public sector equity segment offers a variety of technical assistance services and incentives for underserved public agency facilities. In addition, the IOUs offers a number of local Public sector programs, and all PAs coordinate with the statewide programs to support public agency EE efforts throughout the region. The volume of program activity and additional scrutiny placed on local government and other public agency entities requires additional collaboration and oversight by Public sector PAs.

Public Sector PASC Meetings

Currently IOUs and RENs conduct a variety of coordination efforts, described below, to foster transparency, mitigate customer confusion, and maximize the number of public agencies and facilities that can be impacted by ratepayer-funded Public sector EE programs. PAs agree that a regular PASC meeting including all Public sector PAs will provide an opportunity for high-level updates and, most importantly, a chance to discuss market trends with peers and seek common solutions to any issues or concerns.

SoCal PAs tentatively plan to hold 60-minute PASC meetings every two months during 2024, subject to change. PAs emphasized the importance of creating a structured agenda, identifying clear items for discussion, and distributing the agenda for review at least a week prior to the meeting. Due to the small size and cross-cutting nature of its Public sector technical assistance offering, 3C-REN will attend meetings on an as-needed basis at the discretion of 3C-REN administrative staff.

Data Sharing Protocols

PAs have conducted extensive efforts in the past to establish protocols for sharing information about enrolled agencies and projects that align with PA information security requirements. PAs will continue to use existing protocols and will adapt as needed based on evolving needs. The transfer of confidential customer data will comply with the data sharing guidelines set out by the Commission in D.23-02-002.

Prior Participation

The REN will incorporate into their process a prior participation survey to understand what EE programs the customer has participated in or is currently participating in, what type of projects and what measures if the information is readily available. This will aid in assessing if there is a program overlap and avoid duplicative efforts.

Presenting Available Programs

1. Understanding the customer's need will determine what program(s) may be relevant to the customer.
2. The REN will present all applicable and available EE programs to the customer.
3. The REN will bring in other PA programs to further discuss customer options if needed.

Customer/Project Referral

If a customer explores a program that is other than what the REN is offering, a referral will be made to the applicable program implementer through an e-mail and introduction between the customer and the applicable program and/or implementer.

Customer Confusion and Double-Dipping Mitigation Tactics

PAs described each of all programs currently offered in the market or approved for launch in 2024 in accordance with D.23-06-055, discussed strategies for mitigating customer confusion and double-dipping that have been successfully implemented by Public sector PAs in the past, and introduced potential future strategies to consider. Coordination between PAs that centers the unique needs of public agencies has been, and will continue to be, critical to the ongoing growth and success of the sector.

Tactics that will support the sector's ongoing coordination efforts include:

- PS-1.** RENs meet with third-party implementers of overlapping programs to coordinate on customer enrollment and engagement, participating in an ongoing two-way conversation to identify the best path forward, incentives, and program availability for each customer.
- PS-2.** SoCalREN meets with the statewide WISE™ & PEP PA staff bi-monthly. The programs participate in ongoing co-sharing of enrollment and project pipeline activity.
- PS-3.** SCE, SoCalGas, and SoCalREN will add I-REN to existing monthly project coordination meetings. Due to the small size and cross-cutting nature of its Public sector technical assistance offering, 3C-REN will attend meetings on an as-needed basis at the discretion of 3C-REN administrative staff.
- PS-4.** SoCalREN channels participants to SCE/SoCalGas resource acquisition programs for incentives.
- PS-5.** I-REN is open to ongoing discussion; the current decision tree process used by I-REN and SoCalREN is working well for both PAs and will be utilized in the future.
- PS-6.** PAs agree to mutually sharing pipeline/preliminary discussions, coordinating, making sure agencies are not confused or bombarded with information, keeping customer needs first.

G. Residential

Overlapping activity within the Residential sector centers on Multifamily retrofit incentive programs, which are offered by SoCalREN, 3C-REN, SCE, and SoCalGas. The need for energy efficiency services in the multifamily sector—particularly among underserved communities—is extensive and cannot be fully served even if all PA budgets are exhausted. Therefore, overlap coordination activities are not about restricting PAs or third parties to certain program activity, but how everyone can work together to elevate services for all customers. It is not how we restrict; it is how we maximize the opportunity for everyone.

Residential Sector PASC Meetings

SoCal PAs offering Residential sector programs tentatively plan to hold 60-minute PASC meetings on a quarterly basis, subject to change. PAs emphasized the importance of utilizing a highly structured agenda, providing pre-work to complete in advance of meetings when necessary, and making meetings themselves efficient by sticking to agendas and creating a process for handling “parking lot” issues to address outside the PASC meeting. The Residential sector PAs support use of the optional Program Change Memorandum process described earlier to notify other PAs of major program changes between quarterly meetings.

Data Sharing Protocols

Both SCE and SoCalGas have worked closely with SoCalREN and 3C-REN to develop fully operational verification protocols that allow program staff to determine customer eligibility and prevent double-dipping. SoCalREN, 3C-REN, SCE, and SoCalGas will continue to follow these processes and will also continue to adhere to information security standards, particularly important when dealing with customers’ private household and financial information. The transfer of confidential customer data will comply with the data sharing guidelines set out by the Commission in D.23-02-002.

Prior Participation

The REN will send to the IOUs participant data for prior program participation checks. The IOUs in turn will identify which customers have prior participation and what program and if available, measures.

Customer/Project Referral

If a customer is not able to participate in a REN program for whatever reason, a referral will be made to the applicable program implementer through an e-mail and introduction between the customer and the applicable program and/or implementer.

Customer Confusion and Double-Dipping Mitigation Tactics

During the initial Residential sector coordination meeting, PAs described each of all programs currently offered in the market or approved for launch in 2024 in accordance with D.23-06-055, discussed strategies for mitigating customer confusion and double-dipping that have been successfully implemented in the past, and introduced potential future strategies to consider.

- RE-1.** PAs acknowledge that the Residential market is vast, and that with a focus on communication PAs can avoid bright participation boundary lines and continue to prioritize the best customer participation option and experience.
- RE-2.** All PA programs feature extensive QAQC processes to mitigate double dipping.
- RE-3.** PAs discussed sharing information about each other’s programs through activities conducted via Residential Market Support programs.
- RE-4.** Any SoCalGas invoice must state that a rebate was provided at the time of the sale. There is documentation on SoCalGas programs to ensure no double dipping.
- RE-5.** In addition, SoCalGas has a detailed process to prevent double dipping—the invoice review process is also a mitigation measure.

H. Statewide Programs

There are six statewide programs in the SoCal PAs territories. SCE administers the Statewide Electric Emerging Technologies Program (SWEETP), Higher Education Energy Performance program, and Statewide Water Infrastructure & System Efficiency (SW WISE™) program. SoCalGas administers the Statewide Midstream Water Heating Program, Statewide Gas Emerging Technologies Program, and the Statewide Midstream Food Service Program. The programs serve a diverse set of sectors, including public, commercial, and a blend across all sectors. As statewide programs have a statewide footprint beyond the SoCal PAs’ territories, it is important for the SoCal PAs to coordinate with not just the four statewide programs administered by the SoCal PAs, but all the statewide programs, inclusive of those administered by PAs outside of the Southern California region.

Statewide Programs PASC Meetings

Unlike the other sectors discussed in this JCM, the SoCal PAs do not intend to hold PASC-specific meetings just for statewide programs. This is because viewing just statewide programs in isolation will not facilitate the necessary coordination and communication necessary to ensure lessons learned are shared and that duplicative efforts are avoided. Instead, the SoCal PAs will invite representatives from all statewide programs to sector-specific PASC meetings, as appropriate for those programs and sectors. This will enable PAs to share information, data, and other important information on a regular basis, including how statewide and non-statewide programs can best serve customers and ensure there is no duplication.

Data Sharing Protocols

As statewide programs will not hold PASC-specific meetings or coordinate across all statewide programs, the SoCal PAs are not utilizing any statewide-specific data sharing protocols. Instead, the statewide programs relevant to each sector will follow the data sharing protocols agreed to for that sector.

Prior Participation

The REN will incorporate into their process a prior participation survey to understand what EE programs the customer has participated in or is currently participating in, what type of projects and what measures if the information is readily available. This will aid in assessing if there is a program overlap and avoid duplicative efforts. The REN will also note the statewide precedence guidance from the CPUC.

Presenting Available Programs

1. Understanding the customer's need will determine what program(s) may be relevant to the customer.
2. The REN will present all applicable and available EE programs to the customer.
3. The REN will bring in other PA programs to further discuss customer options if needed.

Customer/Project Handoff

If a customer chooses to explore a program that is other than what the REN is offering, a referral will be made to the applicable program implementer through an e-mail and introduction between the customer and the applicable program and/or implementer.

Customer Confusion and Double-Dipping Mitigation Tactics

The SoCal PAs discussed strategies for mitigating customer confusion and double-dipping that have been successfully implemented in the past and introduced potential future strategies to consider. These strategies were not specific to statewide programs but can be applied to statewide programs. In general, however, just as with the data sharing protocols approach discussed above, the SoCal PAs intend to work with all relevant statewide programs to ensure QAQC processes remain robust, and that information sharing about programs continues in the PASC meetings.

APPENDIX A: Regulatory Guidance

Decision D.18-05-041 requires EE PAs with overlapping service areas to submit a JCM to coordinate program activities. The dicta of the Decision states that JCMs “...must demonstrate how they [PAs] will avoid or minimize duplication for programs that address a common sector (e.g., residential or commercial) but pursue different activities, pilots that are intended to test new or different delivery models for scalability, and/or programs that otherwise exhibit a high likelihood of overlap or duplication and are not targeted at hard-to-reach customers. For such programs, each PA must explicitly identify and discuss how its activities are complementary and not duplicative of other PAs’ planned activities.”⁵

In D.23-06-055 the CPUC established additional JCM requirements. Ordering Paragraph (OP) 35 “...supersedes Decision (D.) 18-05-041 and D.21-05-031 with respect to the timing and submission of Joint Cooperation Memoranda (JCM). Portfolio administrators must submit JCMs every two years, within 60 days after Commission approval of the last of each JCM’s portfolio administrator’s true-up advice letters and mid-cycle advice letters (as applicable), to the California Energy Data and Reporting System, with notice to the service list of Rulemaking 13-11-005 or a successor proceeding.”

In addition to the change in submission cadence, OP 34 in D.23-06-055 also made additional requirements for RENs. “Bay Area Regional Energy Network, Southern California Regional Energy Network, Tri-County Regional Energy Network, and Rural Regional Energy Network shall, for programs that only meet the criterion of serving hard-to-reach customers, include in their Joint Cooperation Memoranda a description of how they will target (i.e., market and conduct outreach to) and to primarily serve hard-to-reach customers or specific hard-to-reach customer segments.”⁶

Finally, D.23-06-055 OP 33 stated “Investor-owned utility (IOU) portfolio administrators must convey information to third-party bidders during the solicitation process, for buildings that have a potential to be served by both IOUs’ third-party implementers and regional energy networks (RENs), about RENs’ efforts to identify hard-to-reach customers or buildings to target for marketing of REN programs.”⁷

⁵ D.18-05-041 at p.97

⁶ D.23-06-055 at p.137

⁷ D.23-06-055 at p.130

APPENDIX B: Table of Overlapping Sectors by PA

Please note: a complete matrix with budget, segment, and measure-level details is attached to this memorandum (filename: 2024-2025 SoCal JCM Matrix).

Table 1. Overlapping Sectors by PA

| | SoCalREN | SCE | SoCalGas | I-REN | 3C-REN |
|----------------------------|---|--|--|-------|----------------------------------|
| <i>Agricultural</i> | Ag PDP Rural-HTR Ag DI Ag Retrofit | ICF Agriculture EE Program | Non-res Cal. Incentive Program Non-res Deemed Incentive Program Agricultural EE Program Nonresidential Energy Advisor (Program) | | Agriculture Technical Assistance |
| <i>Commercial</i> | Sm Comm DI CA GBN Food Desert Equity EE SMB Energy Advisor | Simplified Savings Willdan Commercial Energy Efficiency Program EE Contractor Demand Building Program EE New Program Design Pilots Commercial Strategic Energy Management | Non-res Calculated Incentive Program Nonresidential Deemed Incentive Program Savings By Design Program Nonresidential Energy Advisor Commercial-BEST (RA) COM-LADWP Direct Install Large Commercial EE | | Commercial Marketplace |

| | SoCalREN | SCE | SoCalGas | I-REN | 3C-REN |
|---|--|---|---|---|-------------------------------|
| | | Commercial Energy Advisor Program Commercial Behavioral Program | Non-res Behavioral Program Service RCx Large Com Program S/M Commercial EE (Equity) S/M Commercial EE Program (RA) Strategic Energy Management Commercial-BEST (Equity) Sustainability Studio | | |
| <i>Cross-Cutting: C&S</i> | C&S Compliance Enhancement | Compliance Improvement Subprogram Reach Codes Subprogram Planning and Coordination Subprogram | | Training and Education Program Technical Support Program | Energy Code Connect |
| <i>Cross-Cutting: Finance</i> | Public Agency Revolving Loan Fund Rural-HTR Ag | New Finance Offerings Credit Enhancements | | | Energy Assurance Services |
| <i>Cross-Cutting: WE&T</i> | ACES Pathway Green Path Careers WE&T Opportunity Hub | WE&T Integrated Energy Education and Training (IEET) Subprogram | Integrated EE Training Program CC-Energy Program Outreach | Training and Education Program Workforce Development Program | Building Performance Training |

| | SoCalREN | SCE | SoCalGas | I-REN | 3C-REN |
|--------------------|--|--|--|---|--|
| | Ag WE&T E-Contractor Academy | WE&T Career Workforce Readiness | Educational Outreach Program WE&T-HERS Rater Training Program Retail Partner Training Program | | |
| Public | EE PDP DER-DAC Public Agency NMEC Streamlined Savings Pathway Rural-HTR DI ERAP Regional Partner Initiatives Water & Wastewater SEM Underserved Schools SEM Water Infrastructure | Local WISE™ Program- Legacy Water/Wastewa ter Pumping Statewide WISE™ Program Institutional Partnerships: Statewide HEEP Program Public Energy Performance (PEP) Program | Nonresidential Calculated Incentive Program Nonresidential Deemed Incentive Program Regional Energy Pathways Nonresidential Energy Advisor PUB-Large Public Sector Public Direct Install Program | Technical Assistance and Strategic Energy Planning Public Buildings NMEC Program | |
| Residential | Kits4Kids Multifamily Multifamily HTR DI | Residential Energy Advisor (HEA) Program Residential Direct Install Program Comprehensive Manufactured Homes Program | RES-Energy Advisor Program Residential EE Program - RA Residential EE Program - EQ Burbank Water & Power Home | | Multifamily Home Energy Savings Single Family Home Energy Savings |

| | SoCalREN | SCE | SoCalGas | I-REN | 3C-REN |
|--|----------|--|--|-------|--------|
| | | Enervee Marketplace Program Resi New Construction DAC Marketing and Outreach | Upgrade Program CLEO Program Comprehensive Mobile Home Program Marketplace Multifamily Energy Alliance Program (MEA) (Equity) MEA (RA) Multifamily Whole Building Program (Equity) Multifamily Wh. Bldg. (RA) Pasadena Water & Power Home Upgrade Program Res. Advanced Clean Energy Program (Equity) Res. Advanced Clean Energy Program (RA) Residential Behavioral Program Residential Mobile Home Program Sustainability Studio | | |

APPENDIX C: Program Descriptions & Compliance with REN Criteria

| | | |
|--------------|--|----|
| SCR-AGR-G1 | Agriculture Project Delivery Program | 6 |
| SCR-AGR-G2 | Rural-HTR Agricultural DI..... | 6 |
| SCR-AGR-G3 | Agriculture Retrofit..... | 6 |
| SCR-COM-E1 | Small Commercial Direct Install Program..... | 6 |
| SCR-COM-E2 | California Green Business Network Program..... | 7 |
| SCR-COM-E3 | Food Desert Energy Efficiency Equity (FDEEE) Program..... | 7 |
| SCR-COM-E4 | Small & Medium Business Energy Advisor (SMBEA)..... | 7 |
| SCR-CST-F1 | Codes and Standards Compliance Enhancement Program..... | 8 |
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| SCR-FIN-C3 | Rural-HTR Agriculture Finance Assistance Program..... | 8 |
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| SCR-PUBL-B8 | Water & Wastewater Strategic Energy Management..... | 12 |
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| SCR-RES-A1 | Multifamily Program (Whole Building Comprehensive EE MF Program) | 13 |
| SCR-RES-A4 | Residential Kits4Kids..... | 13 |
| SCR-RES-A5 | Small Multifamily HTR Direct Install | 13 |

SCR-AGR-G1 Agriculture Project Delivery Program

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

Table 2. SCR-AGR-G1 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|--|
| N/A | N/A | This program is exclusive to Small/HTR Agriculture businesses. |

SCR-AGR-G2 Rural-HTR Agricultural DI

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

Table 3. SCR-AGR-G2 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|--|
| Text or N/A | Text or N/A | This program is exclusive to Rural/HTR Agriculture businesses. |

SCR-AGR-G3 Agriculture Retrofit

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

Table 4. SCR-AGR-G3 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|---|
| Text or N/A | Text or N/A | Prioritizes marketing to DAC/HTR, SMB Ag customers. |

SCR-COM-E1 Small Commercial Direct Install Program

The SoCalREN DI Program bridges energy-saving gaps for small, hard-to-reach commercial customers. While larger facilities benefit from rebates, smaller businesses face exclusion due to low energy savings opportunities and strict criteria. SoCalREN’s program provides streamlined, no-cost energy efficiency

measures, empowering underserved businesses to overcome barriers and achieve clean, secure, and affordable energy futures.

Table 5. SCR-COM-E1 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-COM-E2 California Green Business Network Program

The program extends CAGBN implementation across regional partner areas and SoCalREN territory. Leveraging CAGBN resources, it assists small to medium-sized businesses in achieving green business certification. Targeting hard-to-reach businesses, it employs tactics like in-language marketing, walk-through audits, and incentives for equipment upgrades. By promoting sustainability, it showcases businesses committed to environmental action and cost reduction.

Table 6. SCR-COM-E2 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

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

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

Table 7. SCR-COM-E1 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

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

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

Table 8. SCR-COM-E1 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-CST-F1 Codes and Standards Compliance Enhancement Program

SoCalREN is committed to creating decarbonized zero net energy (ZNE) communities. By leveraging their regulatory authority over construction and land use, they aim to accelerate local government leadership in energy efficiency (EE) and greenhouse gas (GHG) goals. Their comprehensive approach includes advanced energy codes, standards, and policies that address compliance, benchmarking, emissions standards, EV readiness, solar requirements, and energy equity.

Table 9. SCR-CST-F1 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-FIN-C1 Public Agency Revolving Loan Fund

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

Table 10. SCR-FIN-C1 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-FIN-C3 Rural-HTR Agriculture Finance Assistance Program

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

Table 11. SCR-FIN-C3 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-WET-D2 ACES Pathway

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

Table 12. SCR-WET-D2 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-WET-D3 Green Path Careers

The GPC Program offers at-risk youth and adults access to the emerging Energy Efficiency (EE) sector. Through collaboration between SoCalREN and Workforce Development, Aging, and Community Services (WDACS), it provides education, training, and work experience. GPC eliminates barriers by offering certification training, supportive services, and coaching, enabling participants to begin their EE careers.

Table 13. SCR-WET-D2 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-WET-D4 WE&T Opportunity HUB

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

Table 14. SCR-WET-D2 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-WET-D5 Agriculture WE&T

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

Table 15. SCR-WET-D2 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-WET-D6 E-Contractor Academy

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

Table 16. SCR-WET-D2 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-PUBL-B1 Energy Efficiency Project Delivery Program

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

Table 17. SCR-PUBL-B1 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-PUBL-B2 Distributed Energy Resource Disadvantaged Communities Program

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

Table 18. SCR-PUBL-B2 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-PUBL-B3 Public Agency NMEC Program

SoCalREN’s Metered Savings Program uses normalized metered energy consumption (NMEC) to measure energy efficiency savings at the meter. It unlocks “stranded” savings beyond typical EE measures incentivized by utility programs. By focusing on lifetime GHG reductions, it encourages deep energy retrofits and peak demand savings. Enhanced incentives are offered to underserved communities

Table 19. SCR-PUBL-B3 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

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

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

Table 20. SCR-PUBL-B4 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-PUBL-B5 Rural-HTR Public Agency Direct Install

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

Table 21. SCR-PUBL-B5 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-PUBL-B6 Energy Resiliency Action Plan

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

Table 22. SCR-PUBL-B6 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-PUBL-B7 Regional Partner Initiatives

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

Table 23. SCR-PUBL-B7 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-PUBL-B8 Water & Wastewater Strategic Energy Management

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

Table 24. SCR-PUBL-B8 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-PUBL-B9 Underserved Schools Strategic Energy Management

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

Table 25. SCR-PUBL-B9 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-PUBL-B10 Water Infrastructure Program

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

Table 26. SCR-PUBL-B10 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-RES-A1 Multifamily Program (Whole Building Comprehensive EE MF Program)

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

Table 27. SCR-PUBL-B4 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-RES-A4 Residential Kits4Kids

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

Table 28. SCR-PUBL-B5 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

SCR-RES-A5 Small Multifamily HTR Direct Install

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

Table 29. SCR-PUBL-B6 Compliance with REN Criteria

| 1 IOU/CCA Program Gaps | 2 Pilot Scalable Activities | 3 HTR Market Activity |
|-------------------------------|------------------------------------|------------------------------|
| Text or N/A | Text or N/A | Text or N/A |

APPENDIX D: Program Change Memorandum Template

| | |
|----------------------------------|--|
| PA | |
| Sector | |
| Date | |
| Program | |
| Summary of Program Change | |

Additional Notes:

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APPENDIX E: PASC Meeting Agenda/Notes Template

| | | | | | | | | | | |
|-------------------------|--|--------------|--|------------|--|-----------------|--|-----------------|--|---------------|
| Sector | | | | | | | | | | |
| Meeting Date | | | | | | | | | | |
| Meeting Location | | | | | | | | | | |
| PAs | | I-REN | | SCE | | SoCalGas | | SoCalREN | | 3C-REN |
| Attendees | | | | | | | | | | |
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Agenda:

Notes:

Action Items:

**2024-2025 SoCal Joint Cooperation Memo (JCM)
Matrix**

