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 (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 doubledipping 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.

| | Г |
|--------------|--|
| | • PASC meetings will occur on a regular schedule and follow a structured format. |
| Frequency | • 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 will ideally include at least one direct representative from each PA organization. |
| Attendees | • 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. |
| Attendees | • 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. |
| | • 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. |
| Agenda | 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. |
| | • The PASC meeting facilitator ² will contact all SoCal PAs by e-mail two weeks prior to the |
| Facilitation | 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. |

Figure 1. PASC Meeting Structure

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 | Managing PA schedules initial meeting with overlapping SoCal PA leads only | Managing PA schedules initial meeting with other CA PA leads only | |
| 1 | Purpose: 1.) Introduce program and have initial discussions on how their programs should and will be coordinated. | | |
| Meeting | Managing PA schedules meeting to include 3P teams + overlapping SoCal PAs. | Managing PA schedules meeting to include 3P teams + all CA PAs. | |
| 2 | 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 doubledipping. 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 WISETM) 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 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 |
|--------------|---|--|--|-------|--|
| Agricultural | 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 |
| Commercial | 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 |

| | SoCaIREN | 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 | | |
| Cross- Cutting: C&S | C&S Compliance Enhancement | Compliance Improvement Subprogram Reach Codes Subprogram Planning and Coordination Subprogram | | Training and Education Program Technical Support Program | Energy Code Connect |
| Cross- Cutting: Finance | Public Agency Revolving Loan Fund Rural-HTR Ag | New Finance Offerings Credit Enhancements | | | Energy Assurance Services |
| Cross- Cutting: WE&T | 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 TM Program- Legacy Water/Wastewa ter Pumping Statewide WISE TM 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 (Equity) Res. Advanced Clean Energy Program (Equity) Res. Advanced Clean Energy Program (Equity) Res. Advanced Clean Energy Program (RA) Residential Behavioral Program Residential Behavioral Program Sustainability Studio | | |

APPENDIX C: Program Descriptions & Compliance with REN Criteria

| SCR-AGR-G1 | Agriculture Project Delivery Program6 |
|--------------|--|
| SCR-AGR-G2 | Rural-HTR Agricultural DI |
| SCR-AGR-G3 | Agriculture Retrofit |
| SCR-COM-E1 | Small Commercial Direct Install Program |
| SCR-COM-E2 | California Green Business Network Program7 |
| SCR-COM-E3 | Food Desert Energy Efficiency Equity (FDEEE) Program7 |
| SCR-COM-E4 | Small & Medium Business Energy Advisor (SMBEA)7 |
| SCR-CST-F1 | Codes and Standards Compliance Enhancement Program |
| SCR-FIN-C1 | Public Agency Revolving Loan Fund |
| SCR-FIN-C3 | Rural-HTR Agriculture Finance Assistance Program |
| SCR-WET-D2 | ACES Pathway |
| SCR-WET-D3 | Green Path Careers9 |
| SCR-WET-D4 | WE&T Opportunity HUB9 |
| SCR-WET-D5 | Agriculture WE&T9 |
| SCR-WET-D6 | E-Contractor Academy10 |
| SCR-PUBL-B1 | Energy Efficiency Project Delivery Program10 |
| SCR-PUBL-B2 | Distributed Energy Resource Disadvantaged Communities Program10 |
| SCR-PUBL-B3 | Public Agency NMEC Program10 |
| SCR-PUBL-B4 | Streamlined Savings Pathway Program (SSP)11 |
| SCR-PUBL-B5 | Rural-HTR Public Agency Direct Install11 |
| SCR-PUBL-B6 | Energy Resiliency Action Plan11 |
| SCR-PUBL-B7 | Regional Partner Initiatives12 |
| SCR-PUBL-B8 | Water & Wastewater Strategic Energy Management12 |
| SCR-PUBL-B9 | Underserved Schools Strategic Energy Management12 |
| SCR-PUBL-B10 | Water Infrastructure Program12 |
| SCR-RES-A1 | Multifamily Program (Whole Building Comprehensive EE MF Program) |
| SCR-RES-A4 | Residential Kits4Kids13 |
| SCR-RES-A5 | Small Multifamily HTR Direct Install13 |

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 Foo

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 mediumsized 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 Hardto-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

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

Additional Notes:

APPENDIX E: PASC Meeting Agenda/Notes Template

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

Agenda:

Notes:

Action Items:

2024-2025 SoCal Joint Cooperation Memo (JCM) Matrix

| JCM KEY | PA | Program ID | Program Name | Sector | Sector | 2024-2027 Budget | Target Audience | Target Audienc | Comm 1 |) New | Target Audie Nobile Rur | nce al Sch | SF MF | HTR DA | AC ResourceNon- Resource | Segment | Other Program Differentiators | Lightin 9 | Applian | HVAC Plug Load | Refrige Cu ration r | asures sto Lightin Contro | g HVAC Is Controls | Whole N Buildin H | ater Other |
|------------|----------|---------------|--|--------|----------------------------------|------------------|--|-------------------|--------|-------|----------------------------|---------------------|------------|---------------------|-----------------------------------|---------|--|--------------|---------|-------------------|------------------------|---------------------------------|-----------------------|----------------------|------------|
| REN | IREN | IREN-PUBL-001 | Technical Assistance and Strategic Energy Planning | Pub | Public | \$ 12,422,776.21 | Counties, cities, school districts, water districts, special districts, tribal communities, and community-serving buildings in Riverside and San Bernardino counties | • | | | | | | | Non-resource | | Conclerge-sityle support, strategic energy planning, and information on financing optionas; more local focus; focus on HTR, DAC, underserved, tribal and ESJ | | | | | | | 9 | |
| REN | I-REN | IREN-PUBL-002 | Public Buildings Normalized Metered Energy Consumption (NMEC) Program | Pub | Public | \$ 18,533,739.03 | Public sector facilities in disadvantaged, low income, and vulnetable communities in Riverside | $\left \right $ | + | | \vdash | ++ | + | ++ | Resource | | DAC, underserved, tribal and ESJ communities Focus on HTR, DAC, underserved, tribal and ESJ communities; performance-based | Yes | Yes | Yes Yes | Yes Y | es Yes | Yes | Yes | Yes n/s |
| REN | I-REN | IREN-WET-001 | Training and Education Program | WE&T | Workforce Education and Traini | \$ 5,159,834.78 | and San Bernardino counties Local building industry professionals, contractors, and students in Riverside and San Bernardino | | | | | | | | Non-resource | | incentives. Localized focus on entry-level oferenings; EE training and career paths at education | | | | | | | | |
| REN | I-REN | IREN-WET-002 | Workforce Development Program | WE&T | Workforce Education and Training | \$ 7,239,629.02 | counties Local workforce providers, employers, and job seekers in Riverside and San Bernardino counties | | | | | | | | Non-resource | | centers; focus on HTR, DAC, underserved, tribel and ESJ communities. Targets job seekers, students, workers, | | | | | | | | |
| | | | | | | | seekers in Riverside and San Bernardino countier | 1 | | | | | | | | | Targets job seekara, students, workers, pather orgnaizations like workforce investment boarad (WiBs); local focus; focus on HTR, DAC, underserved, tribal | | | | | | | | |
| REN | IREN | IREN-CS-001 | Training and Education Program | C&S | Codes and Standards | \$ 4,153,930.31 | Local building departments and building industry professionals in Riverside and San Bernardino counties | | | | | | | | Non-resource | | and ESJ communities. Locally informed training and education; focus on HTR, DAC, underserved, tribal and ESJ communities. | | | | | | | | |
| REN | IREN | IREN-CS-002 | Technical Support Program | C&S | Codes and Standards | \$ 2,750,913.68 | Local building departments and building industry professionals in Riverside and San Bernardino counties | | | | | | | | Non-resource | | Incus on MTR, DAG, underserved, incus and ESJ communities. Focus on MTR, DAC, underserved, inbal and ESJ communities. | | | | | | | | |
| REN | SoCaREN | SCR-AGR-G1 | Agriculture Project Delivery Program | Ag | Agriculture | \$ 2,677,500.00 | Small and medium DAC, runal, and underserved Agricultural customers | | | | | | | | Non-Resource - Market Support | | The program offers comprehensive services to support agricultural customers, providing them with a suble of services to better manage their facilities and implement EE projects. The program file market gaps, providing customers with an | n/a | n/a | nia nia | nia nia | n/a | n/a | nia ni | n/a |
| | | | | | | | | | | | | | | | | | implement EE projects. The program fila market gaps, providing customers with an integrated, objective, and comprehensive EE solution. Services include energy use | | | | | | | | |
| | | | | | | | | | | | | | | | | | EE solution. Services include energy use analysis, audia, design performance specifications, scope of work support, incentive and financing application support, financial analysis, procumment assistance, and construction menagement support. | | | | | | | | |
| | | | | | | | | | | | | | | | | | financial analysis, procurament assistance, and construction management support. | | | | | | | | |
| REN | SoCaREN | SCR-AGR-G2 | Rusi-HTR Agricultural DI | Ag | Agriculture | \$ 9,870,257.00 | Small to medium Agricultural cuatomera including DAC and HTR cuatomera | | | | | | | | Resource - Equity | | Provide technical assistance, incentives, and direct install services. The program works with technology providers, distributors, and contractors to advence | Yes | Yes | Yes | | | | | Yes |
| | | | | | | | | | | | | | | | | | works with technology providers, distributors, and contractors to advance cost effective energy efficiency measures to undersearced conteners. Small and | | | | | | | | |
| | | | | | | | | | | | | | | | | | distributors, and contractors to advence cost effective energy efficiency measures to underserved customers. Small and medium Ag customers in rural, disadvantaged communities will not be the primary focus of I/OU third-party programs due to TRC constraints and cost to serve. | | | | | | | | |
| REN | SoCaREN | SCR-AGR-G3 | Agriculture Retrofit | Ag | Agriculture | \$ 7,258,548.00 | Small and medium Agricultural customers including water agencies and inigation districts | | | | | | | | Resource Acquisition | | due to TNC constraints and cost to serve. The program will provide Ag customers the recessary technical assistance to identify | - | Yes | Yes | Y | | Yes | | Yes |
| | | | | | | | | | | | | | | | | | The program will provide Ag customers the necessary technical assistance to identify resource awings and process improvements through energy advisor audts. Additionally, incentives in the form of the second | | | | | | | | |
| RFN | SACAREN | SCR.FILC2 | Rusl-HTR Anim Day Finance Assistance Provide | CC En | Cons-Cuttion Finance | \$ 2 104 200 05 | Small to Medium An Customer inclusion DAC | | | | | | | | Neo-Resource - Market | | or engineering support and paid for renformance rehates will be remained to | | | | | | | | |
| | | - | | | | | Small to Medium Ag Customer including DAC and HTR Ag customers. This includes Small BusinesaCustomers, Severely Disadvantaged Communities (SDACs), and Socially | | | | | | | | Support | | offset the initial cost of installations. Provide an On-Bit Pinancing (OBP) revolving loan fund (RLF) designed to provide bridge funding to fit the gap between the OBF payment and contractor | | | | | | | | |
| REN | SoCalREN | SCR-COM-E1 | Small Commercial Direct Install Program | Comm | COM | \$ 8,183,333.00 | Disadvantaged Farmers and Ranchers. HTR business customers | | x | | \square | + | ╞ | × | Resource - Equity | | payment. Small, underserved business facilities will be eligible to participate in the program and receive no-cost measure installations at | Yes | Yes | Yes | Yes | 1 | Yes | Y | s Yes |
| | | | | | | | | | | | | | | | | | qualifying sites. Participants will also receive hands-on project management support from project identification through installation and realization of energy | | | | | | | | |
| REN | SoCaREN | SCR-COM-E2 | California Green Business Network Program | Comm | сом | \$ 1,705,500.00 | Small to medium sized businesses with focus on HTTP | | | | | ++ | _ | ++ | Non-resource - Market Ramont | | savings. This program expands the implementation | n/a | n/a | nia nia | nia nia | n/a | n/a | nia ni | n/a |
| | | | | | | | | | | | | | | | Three | | within regional partner peographic regions and throughout the SoCalREN tentiony. The implementing regional partners would | | | | | | | | |
| | | | | | | | | | | | | | | | | | of the California Creem Business Network within regional particle geographic regions and throughout the ScCaliffEl Networky. The implementing regional partners vocate the regional particle of the second second CAGBN to assist amail to meetium sized califormism and and the second second transmission to activity of the second second language markating, officing waithhough comparement metal concervant for exportment to partners for exportment to partners. | | | | | | | | |
| | | | | | | | | | | | | | | | | | HTR businesses through tactics such as in language marketing, offering walkthrough audits with measure recommendations | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | |
| REN | SoCaREN | SCR-COM-E3 | Food Desert Energy Efficiency Equity (FDEEE) Program | Comm | СОМ | \$ 12,176,205.00 | comer stores, small business grocers, food banks, small-scale independent restaurants located in low-income neighborhoods and DACs | | + | | | $\uparrow \uparrow$ | \uparrow | | Resource - Equity | | This program support comer stores and | | | | Yes | | | + | |
| | | | | | | | | | | | | | | | | | small businesses within food deserts by providing more healthy food options (leveraging non-EE ratepayer funding) and funding new energy-efficient refigerators. Through this initiative, store owners save | | | | | | | | |
| | | | | | | | | | | | | | | | | | on energy usage and utility bils while providing fresh and healthy food options for the communities they serve. | | | | | | | | |
| REN | SoCaREN | SCR-COM-E4 | Small & Medium Business Energy Advisor (SMBEA) | Comm | COM | \$ 2,787,960.00 | small and medium businesses (annual non- coincident peak demand of less than 20kW and less than 200kW respectively) | | | | | | | | Non-resiource - Market Support | | Program offers hands-on services to educate business owners about energy costs, the value of efficiency, and support | n/a | n/a | nia nia | ala ala | 0/4 | o/a | nia ni | e ta |
| | | | | | | | | | | | | | | | | | educate business owners about energy costs, the value of efficiency, and support applications for financing products in the marketplace. SMBEA will provide a dedicated Project Manager as a single point of contact to coordinate delivery of services across programs and minimize complexity for business owners. | | | | | | | | |
| L | | | | | | | | | | | | | | | | | porte di consecte o coordinale delvery of services across programs and minimize complexity for business owners. | | | | | | | | |
| REN | SoCaREN | SCR-CST-F1 | C&S Compliance Enhancement Program | CC C&S | Cross-Cutting: C&S | \$ 2,980,000.00 | Local Government departments considered authorities having jurisdiction (AHJs). Other targeted participants would be practitioners | | | | | | | | Non-resource - C&S | | The program offerings and focus areas will be developed based on a needs assessment to beerfly C.35 compliance gaps and barriers. The program will also uniquely offer an Eberrgy Code Coch for balking department safel and stakeholden. Diver differentiations include an colline clearing/scase of information, data-drawn learning/scase of information, data-drawn | n/a | o/a | nia nia | nia nia | n/a | n/a | n/s n/ | n/a |
| | | | | | | | (developers, contractors, architects, etc.) applying for permits that trigger Title 24 or Title 20. | | | | | | | | | | gaps and barriers. The program will also uniquely offer an Energy Code Coach for building department staff and stakeholders. Other differentiators invitede an onler- | | | | | | | | |
| | | | | | | | | | | | | | | | | | Other differentiations include an online clearinghouse of information, data-driven lechnical assistance, advanced energy code opportunities identification and planning, and actual measurement and | | | | | | | | |
| | | | | | | | | | | | | | | | | | planning, and actual measurement and analysis of the impacts from C&S interventions based on community energy baseline data. Lastly, SoCaREN will develop tools and technical assistance to provide access to accurate C&S data. | | | | | | | | |
| L | | | | | | | | | | | | | | | | | | | | | | | | | |
| REN | SoCaREN | SCR-FIN-C1 | Public Agency Revolving Loan Fund (Revolving Savinga Fund) | CC Fin | Cross Cutting: Finance | \$ 2,338,000.00 | Cities, Counties, Tribes, School Districts, Community Colleges, Public Universities, Water and Wastewater Districts, Special Districts, Federal and Rate According | | Т | | IT | $ \top$ | | $ \top$ | Non-resource - Equity | | 0% interest, up to 5 year loan, simple and streamlined application process | n/a | n/a | nia nia | nia nia | n'a | n/a | nia ni | n/a |
| REN | SoCaREN | SCR-PUBL-B1 | Public Agency Project Delivery Program | Pub | PUB | \$ 35,247,123.00 | Pederal and State Agencies Cites, Counties, Tribes, School Datricts, Community Colleges, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencies | | \pm | | Ħ | $\uparrow \uparrow$ | 1 | $\uparrow \uparrow$ | Non-resource - Market Support | | The program offers comprehensive services to support all public sector customers, providing them with a suite of | n/a | n/a | nia nia | nia nia | n'a | n/a | n's n' | e/a |
| | | | | | | | Pederal and State Agencies | | | | | | | | | | services to support all public sector customers, providing them with a sub of services to better manage their facilities and implement EE project. The program film market gaps, providing agencies with in integrated, objectiva, and comprehensive EE solution. Services include energy use analysis, audit, design performance specifications, accept of work support. The sector and provide another absorb. Incerting antiparticipation and provide table and provide and financine another absorb. Incerting antiparticipation and provide table and provide and financine another anoth | | | | | | | | |
| | | | | | | | | | | | | | | | | | comprehensive EE solution. Services include energy use analysis, audits, design performance specifications, scope of work | | | | | | | | |
| | | | | | | | | | | | | | | | | | performance specifications, scope of work support, incentive and financing application support, financial analysis, procument assistance, and construction management support. | 1 | | | | | | | |
| REN | SoCaREN | SCR-PUBL-B10 | Water Infrastructure | Pub | PUB | \$ 9,551,422.00 | facilities/systems including Water Agencies, Wastewater Agencies, Special Districts, Local | | + | | \vdash | ++ | + | ++ | Resource Acquisition | | | | | \vdash | ++ | + | | + | × |
| | | | | | | | facilities/systems including Water Agencies, Wastewater Agencies, Special Districts, Local Government Agencies, Water Investor-Owned Utilities (IOUs), and other water pumping or treatment customers | | | | | | | | | | Program wa be entrany rocused on working with customers to plain intricate water projects such as wastewater moting, ultravidet controls, and pump sequencing projects. Offers a comprehensive measure mix to | | | | | | | | |
| | | | | | | | | | | | | | | | | | Offers a comprehensive measure mix to enable system optimization-based EE, which phases projects from component efficiency improvement to controls to system-wide water system or treatment encodes existimation. | | | | | | | | |
| REN | SoCaREN | SCR-PUBL-82 | Public Agency DER DAC Program (Pathway to | Pub | PUB | \$ 4,850,743.00 | Offees, Counties, Tribes, School Districts, Community, Colleger, Buble Universities, Water | | | | \vdash | ++ | _ | ++ | Non-resource - Equity | | Provides resources for additional IDSM | n/a | n/a | nia nia | 5/8 5/8 | n'a | t/a | nia ni | |
| REN | SoCaREN | SCR-PUBL-83 | Zaro) NMEC Public Agency Program (Metered Energy Savinga Program) | Pub | PUB | \$ 5,824,901.00 | and Wastewater Districts, Special Districts, Federal and State Agencies Cities, Countes, Tibes, School Districts, | | | | | \parallel | _ | | Resource Acquisition | | solutions to be integrated into EE projects. Enhanced incentives for underserved | Yes | Yes | Yes Yes | Yes Yes | Yes | Yes | Yes Ye | s Yes |
| | | | Savinga Program) | | | | Consult Collision, Fridai, Solido Lankas, Commenty Collegas, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencias Cities, Countes, Tribes, School Districts, Community Collegas, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencies | | | | | | | | | | communities, incentives designed to maximities CHG savings / TBB savings. The program will provide public agencies with quarterly savings reports and technical support to ensure savings persist into the feature. | | | | | | | ľ | · |
| REN | SoCaREN | SCR-PUBL-84 | Streamlined Savings Pathway Program | Pub | PUB | \$ 8,044,312.00 | Cities Counties Tables School Districts | | | | | \parallel | _ | | Resource Acquisition | | | Yes | Yes | Yes Yes | Yes Yes | Yes | Yes | Yes Ye | s Yes |
| | | | | | | | Community Colleges, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencies | | | | | | | | | | Implement comprehensive EE projects. Enhanced incentives for underserved communities. Incentives designed to management GMP | | | | | | | ſ | |
| | | | | | | | | | | | | | | | | | Provides an expected pathway to implement comprehensive EP projects. Enhanced incentives for underserved communities. Certain search and a search and materials CHG savings 11285 androgs. The S2P reduces project delays and complexities for public agencies by implementing aduct transitions for project application technical review and approval. | | | | | | | | |
| REN | SoCaREN | SCR-PUBL-85 | Runal-HTR Public Agency Direct Install Program | Pub | PUB | \$ 8,730,378.00 | Cites, Counties, Tribes, School Datricts, | | | | \square | ++ | _ | \parallel | Resource - Equity | | application technical review and approval. Bervoes smaller, underserved public | Yes | | Yes | \vdash | +- | | - | s Yes |
| | | | | | | | Olies, Counties, Tribes, School Districts, Community Colleges, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencies | | | | | | | | | | Services smaller, underserved public againcy facilities that are unsupported by other energy efficiency programs. The Di Program enables smaller public agencies to achieve no-cost energy and peak | | | | | | | | |
| | | | | | | | | | | | | | | | | | Is achieve no-cost energy and paik demoti savigos tracifs par seven naluding als investorias, explorant, deposal, The Di Program overcomes nuesercos market barriers by offering the adulation of a range of practiced energy mathetics of a range of practiced energy that strong the practice of the seven of establish and/or attempt to the realistics of critical inflamiona. It will generate a scholarometic in Subgramma and accounterprint functions. It will generate accounterprint functions and accounterprint functions are subgramma and accounterprint functions and accounterprint functions and accounterprint accounterprint functions to support agencies with regional planning and | | | | | | | | |
| | | | | | | | | | | | | | | | | | exposal. The DI Program overcomes numerous market beniers by offering the installation of a range of prescribed energy efficiency measures | | | | | | | | |
| REN | SoCaREN | SCR-PUBL-86 | Energy Realiency Action Plan Program | Pub | PUB | \$ 6,300,000.00 | Cities, Counties, Tribes, School Districts, Community Colleges, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencies | | | | | | | | Non-resource - Market Support | | This program focuses on developing an EE and DER deployment roadmap to establish and/or strengthen the realisence | n/a | n/a | nia nia | s/a s/a | 0/4 | s/a | nia ni | n/a |
| | | | | | | | Pederal and State Agencies | | | | | | | | | | of critical infrastructure. It will generate regional maps highlighting climate and socioeconomic indicators to support | | | | | | | | |
| | | | | | | | | | | | | | | | | | socioeconomic indicators to support agencias with regional planning and prostization of project implementation. The program will rely on engagement from community stakeholders and will leverage energy and GHG inventories to inform goals and stategies developed for each customer. | | | | | | | | |
| | | | | | | | | | | | | | | | | | energy and GHG inventories to inform goals and strategies developed for each cuatomer. | | | | | | | | |
| REN | SoCaREN | SCR-PUBL-87 | Regional Partner Initiatives | Pub | PUB | \$ 2,750,000.00 | Cites, counties, tibes, k-12 school datricts, community colleges, public universities, water and wastewater datricts, special Districts, federal, and state | | | | | | | | Non-resource - Market Support | | This program leverages regional partners to test new and innovative intervention strategies that can then be scaled as | n/a | n/a | nia nia | nia nia | n/a | n/a | nia ni | e/a |
| | | | | | | | agencies | | | | | | | | | | appropriate to other regions. SoCaREN offers a streamlined approach for regional partners to submit initiative | | | | | | | | |
| | | | | | | | | | | | | | | | | | This program leverages regional partners to leaf new and innovative intervention statutiges that can then be scaled as appropriate locker regions. So-CaREN offers a steamined approach for regional partners to subnet initiative ideas for consideration through a simplified application process adrogates support to develop ideas and property categorias them. | 1 | | | | | | | |
| REN | SoCaREN | SCR-PUBL-88 | Water and Wastewater SEM Program | Pub | PUB | \$ 8,758,295.00 | Public sector customers with municipally owned potable weiter systems and wastewater treatment plants (WWTP) within SCE's service territory. | | | | | | | | Resource - Market Support | | Program focuses on helping public agencies with municipally owned potable water systems and wastewater beatment | Yes | Yes | Yes Yes | Yes | Yes | Yes | 'n | s Yes |
| | | | | | | | SCE's service territory. | | | | | | | | | | them Program focuses on helping public agencies with municipally consult potable water systems and washenater beatment path (WUTP) specific compositions path demand notuction projects. It offers nonstary incomes for quality projects based on pask demand reductions using an SPM arcomerch | | | | | | | | |
| | | | | L | | | | | | | | | | | | | | | | | | | | | |
| REN | SoCaREN | SCR-PUBL-89 | Underserved Schools Strategic Energy Management (SEM) Program | Pub | PUB | \$ 6,076,069.00 | K-12 schools and community colleges in underserved communities | | | | | | | | Resource - Equity | | Focus on HTR customers. By utilizing an SEM approach, the program will support peak demand reduction | Yes | Yes | Yes Yes | Yes Yes | Yes | Yes | Yes Ye | s Yes |
| | | | | | | | | | | | | | | | | | stategies and deep energy efficiency retrofts through a minimum of 3-year engagements with schools. The program will help underserved schools and community | | | | | | | | |
| | | 000 0C1 | | | | | | | | | | | | | | | schools. The program we hep underserved schools and community colleges set goals and take actions to neduce peak period charges. Provides technical and financial support to | | L | | | \perp | | | |
| MEN | SoCaREN | SCR-RES-A1 | Multilarrily Program | Rea | rossidential | \$ 31,416,952.00 | Focus on DAC and HTR communities | ΙŤ | Γ | | | ΙT | × | x | x Nesource Acquisition | | Provides technical and financial support to reduce energy usage at the property through the completion of comprehensive referits. | Yes | Yes | Yes Yes | Y | es Yes | Yes | Yes | Yen Yen |
| ۱ <u> </u> | | | i | | | ù | | | | | I | | | - I I | 1 | | puesellä. | | ı | . I. | ı — I — | | | 1 | - 1 |

| JCM | PA | Program ID | Program Name | Sector | Sector | 2024-2027 Budget | Target Audience | Tamat Cam | | Target Au | lience | | | Resmant | Other Program Differentiators | T tebrie I | Anotion | WAC I B | ton Babin | Measure | liabiles | | te T Water | Other |
|--|--|---|--|---|---|--|---|---------------------------------|-----|-----------|---|-----------|--|--|--|---|---|--|--|---|---|--|--|---|
| REN | SACAREN | SC8.8F5.44 | Residential Khalikita | Res | Residential | \$ 7,797,741.00 | Elementary schools that meet CPUC HTR and/or DAC orberta | Target Comm Audienc e | | | | x x | Resource | 200 min | | 9 Yes | ces | Line L | oad ration | m | Controls C | HVAC Who controls Built g | din Heating | Yes |
| 12.14 | Jocant.n | JUNILIAN | PORTUGER AND PORTUGER | - Cala | | | DAC orbria | | | Î | | ^ ^ | x x Resource - Marke Support | | A set of energy saving measures (contained in the KB), whong with abasis backstrong and the KB and the KB and the Backstrong, are provided at no cost to the subserior. The subsets take the kH homes, and together with their family, install the measures in their homes. In addition to the emergy and cost savings anchived by the installed measures, the Program offers educations with a classoor homewith grant the | | | | | | | | | |
| | | | | | | | | | | | | | | | the students. The students take the kit home, and together with their family, install the measures in their home. In addition to the measure and east ensure exhimite to | | | | | | | | | |
| | | | | | | | | | | | | | | | the energy and cost savings achieved by the installed measures, the Program offers educators with a classroom incentive grant | | | | | | | | | |
| REN | SoCaREN | SCR-RES-A5 | Small HTR Multifamily Direct Install | Rea | Residential | \$ 9,598,846.00 | Small Apartment Buildings: Multifamly apartment buildings with issa than 50 units, with ownentwealents considered Hurd-to-Reach or located in a Disadvantaged Community. Condominium Poportisc: Complexes with an HOA and/or property management company. | | | | x | x | x x Resource Acquis | on | Bridges the gap between government subsidized housing and high-end lifestyle spartments. | Yes | Yes | Yes | Yes | | Yes | Yes | Yes | Yes |
| | | | | | | | located in a Disadvantaged Community. Condominium Properties: Complexes with an HOA and/or property management company. | | | | | | | | | | | | | | | | | |
| REN | SoCaREN | SCR-WET-D2 | ACES Pathway | CC WEAT | Cross-Cutting: WE&T | \$ 1,974,000.00 | K-12 and college students; direct outreach to feeder schools in service territory with a concentration of Title I schools and those located in DAC/HTR ZIP codes. | | | | | | Equity | | ACES provides students with a head start on Science, Technology, Engineering, Arts, and Math (STEAM) pathways to clean energy cancers through lattor-free college emolment that enables students to take engineering, architecture, and constructor-related neuroscient field nonvideo transferable | | | | | | | | | |
| | | | | | | | In DACHTR ZIP codes. | | | | | | | | clean energy careers through tailor-free college enrolment that enables students to take engineering. | | | | | | | | | |
| | | | | | | | | | | | | | | | architecture, and construction-related coursework that provides transferable college credit to the California State University and University of California systems. | | | | | | | | | |
| REN | SoCaREN | SCR-WET-D3 | Green Path Careers | CC WE&T | Cross-Cutting: WE&T | \$ 3,537,000.00 | Al-tisk youth and adults who are not pursuing | | | | | | Equity | | Breaklast of sick and the and and the surround to | | | | | | | | | |
| REN | SACAREN | SCR-WET-D4 | WE&T Oceanity HUB | CC WEST | Cross-Cuting: WE&T | \$ 2.274.800.00 | higher education by attending college. | | | | | | Market Survey | | Torona areas for point and point and point and point of the emerging Financy Efficiency (EE) seeds by offering education, training, and work experience in the field. One-stop shop (virtual and physical) community field (the physical) and access to energy efficiency (EE) consumer information, training, and networking occontanties. | e | | | | | | | | |
| REN | SoCaREN | SCR-WET-D4 | WE&T Opportunity HUB | CC WE& | Cross-Cutting: WE&T | \$ 2,274,800.00 | HTR and DAC in the Southern California Region in the quast to reducing the labor shortage in EE and construction fields. | | | | | | Market Support | | One-stop shop (vitual and physical) community resource providing high visibility and access to energy efficiency (EE) crossmer information training and | y | | | | | | | | |
| REN | SoCaREN | SCR-WET-D5 | Agriculture WE&T | CC WEAT | Cross-Cuting: WE&T | \$ 874,200.00 | Small to Medium Ag Customer including DAC and HTR As customers. This includes Small | | | | | | Market Support | | consumer momentation, name, and networking opportunities. To increase the size, skills, and diversity of the Ag EE labor force in the Southern California region to ensure effective | | | | | | | | | |
| | | | | | | | Small to Medium Ag Customer including DAC and HTR Ag customers. This includes Small BusinessCustomers, Severely Disadventaged Communities (SDACa), and Socially Disadventaged Famers and Flanchers. Small and ridense contentron in DAC and HTR | | | | | | | | implementation of the state's EE goals. | | | | | | | | | |
| REIN | SOCAREN | bLR-WEI-D6 | E-Contractor Academy | CC WEA | Cross-Curing: WEAT | \$ 1,880,000.00 | omai and diverse contractors in DAC and PTPC aneas | | | | | | Market Support | | Designed to prepare small and diverse contractors to compete for and perform energy efficiency retrofit projects throughout SoCal. Training and technical | | | | | | | | | |
| | | | | | | | | | | | | | | | assistance provide contractors with access | | | | | | | | | |
| | | 100 0 - 601 | Commercial Marketolace | | | | | | | | | | | | to bonding and capital resources and an introduction to sustainability, public contracting requirements, and how to bid on EE projects. Eageland small- and medium-sized enharpsies and hard-to-each commercial | | | | | | | | | |
| REN | SC-REN | TCN-Com-001 | Commercial Marketplace | Comm | Commercial | \$8,276,396.96 | Hard-to-reach commercial customers in the Central Coast region who can benefit from energy efficiency incentives, technical assistance, and financing confirms. | | | | | | Resource | | customer participation | Yes | Yes | Yes | Yes Yes | Yes | Yes | Yes Ye | s Yes | n/a |
| REN | 3C-REN | TCR-AG-001 | Agriculture Technical Assistance | Ag | Agricultural | \$1,721,537.47 | financing options. Agricultural customers in Ventura, Santa Barbara, and San Luis Obispo Counties who need personalized, customized technical assistance to | | | | | | Non-resource | | specialized support for indoor agriculture/carnabia and water-energy nexus measures; focused outreach to | | | | | | | | | |
| | 10.00 | 700.00.00 | Energy Assessment Acceleration | 000 | Passa Part - An | | and San Luis Obipo Counties who need personalized, customized technical assistance to identify and implementary programs. | | | | | \square | | | aproclamatic application reacon agriculture/carnabia and water-energy nexus measures; focused outwach to smaller producers and socially disadvantaged agricultural customers based inducing sament to commencial and | | | | | | | | 1 | |
| REN | 3C-REN | TCR-CC-001 | Energy Assurance Services | CC Other | Cross-Cutting: Other | \$2,940,000.00 | Commercial and public sector customers who need outwach and technical assistance to pursue comprehensive load management and easilency projects through other nebute programs available | | | | | | Non-resource | | local technical support to commercial and public sectors; assistance to small and under-esourced jurisdictions, critical facilities, and community-serving locations | | | | | | | | | |
| REN | SC-REN | TCR-CS-001 | Energy Code Connect | CC C&S | Cross-Cutting: C&S | \$7,152,238.78 | projects through other rebale programs available in the region. All stakeholders impacted by energy code | - | ++ | ++ | ++ | ++ | Non-resource | | | | | -+ | + | + | + | | 1 | \vdash |
| | | | | | | | | | | | | | | | Incar parton-o-parton trainings, mentoship and in-the-field opportunities, reach code support, as well as over-the- counter and on-call expert assistance for C&S education and support | | | | | | | | | |
| REN | 3C-REN | TCR-Res-002 | Multifamily Home Energy Savings | Res | Residential | \$15,983,929.25 | Multifamily residential (5 or more units, existing buildings) customer segments in Ventura, Santa Barbara, and San Luis Obisco Counties: | | | | | x | x x Resource | | target hard-to-reach residential customers; employ neighborhood approaches to reach more rural areas; technical | Yes | Yes | Yes | Yes Yes | Yes | Yes | Yes Ye | s Yes | n/a |
| | | | | | | | Multilamity reaidential (5 or more units, existing buildings) customer segments in Ventura, Santa Bathara, and Santa Luia Obipo Crustilias; emphasis on targeting HTR reaidential customera, including methera and owners, and multilamity properties located in DACs. Income is a component of targeting but is not limited to IQ. | | | | | | | | assistance | | | | | | | | | |
| REN | 3C-REN | TCR-Res-003 | Single Family Home Energy Savings | Res | Residential | \$19,155,008.81 | a component of targeting but is not limited to IQ. Single-family residential customer segments in | | ++ | ++ | ++ | x | x x Resource | _ | target hard-to-reach residential customers; | Yes | Yes | Yes | Yes Yes | Yes | Yes | Yes Ye | s Yes | n/a |
| | | | | | | | Single-family residential customer segments in Venture, Sente Berbara, and San Luis Obispo Counters, emphasis on targeting HTR residential customers, including renters and owners located in DACs. | | | | | | | | employ neighborhood approaches to reach more runal areas, virtual and physical educational tools distributed through public library system | | | | | | | | | |
| REN | 3C-REN | TCR-WET-001 | Building Performance Training | CC WE&1 | Cross-Cutting : WE&T | \$8,737,458.83 | Calculations, including professionals, including toose in DACs and HTR areas, as well as other workforce | | | | | | Non-resource | | Ibrary system local trainings and mentorship opportunities, including hard-to-reach workers and those identified as living in | | | | | | | | | |
| | SCE SCE | SCE Res Equity 001 SCE Res Equity 002 | 1 Home Energy Advisor (HEA) Program 2 Home Energy Advisor (HEA) Program Residential Direct Intel Provision | Res Res | Residential Residential Residential | \$ 9,378,063.54 \$ 5,959,043.00 | Single-tarriay or naid-ab-lour unit dwallings. Single-family or multifamily dwallings. Residential homeowner confermers that qualify for | x x | | \pm | \pm | x x x | Resource Non-Resource | Equity Equity | disadvantaged communities | | | Ye- | | | - | Yes | | Yes |
| 100 | SCE | SCE-13-SW-001G | Comprehensive Manufactured Homes Program | Res | Residential | \$ 10,794,049.00 | direct install include Mobil homes for retrofits Mobil home dwellings | | x | x | | x | Resource | | | ĻЦ | | Yes | | | [| Tes Yes | 1_ | Щ |
| 100 | SCE SCE | SCE 3P 2020RCI 00 SCE-13-SW-001F | Comparisative Mantalactived Homes Program OEnervee Marketplace Program Residential New Construction | Res Res | Residential Residential | \$ 6,747,628.05 \$ 86,449.05 | Residential customers including DAC and HTR New construction builders with a focus on education, design assistance and financial | | x | x | x | x x | x x Resource Resource | Resource Aquisition | | | | | + | Yes | + | Ye | | Yes |
| iou | SCE | SCE_Res_Equity_003 SCE_SW_PLA | 5 Disadvantaged Communities Marketing and Outreach Plug Load and Applance | Res | Residential | \$ 4,590,598.00 \$ 19,289,484.58 | support Single and multi family | × | | | | x x | Non-Resource | Equity | | | ¥ | | Ven | | | | | |
| iou Iou | SCE-SW | SCE_SW_PLA | SW Non Res Res New Construction | Res | Residential | * 19,209,484.58 \$ 11,710,338.48 | Residential statewide program. SCE provides funding to the Lead PA, SCG, for this statewide program Residential statewide program. SCE provides | | x | x | x | x x | x x Resource | | | | Telà | | | | | V. | | |
| iOU | SCE-SW | SCE_SW_NC_NorRe | SW Non Res Res Mosed New Construction | Res | Residential | \$ 6,243,914.53 | Residential statewide program. SCE provides funding to the Lead PA, SCG, for this statewide program Residential statewide program. SCE provides funding to the Lead PA, SCG, for this statewide | | × | | | | Resource | | | | | | | | | Ye | | |
| iou | SCE-SW | SCE_SW_NC_Res_el | e SW Res New Construction | Res | Residential | \$ 33,013,844.90 | funding to the Lead PA, SCG, for this stateside program Residential statewide program. SCE provides funding to the Lead PA, SCG, for this stateside | | | | | | Resource | | | | | | | Yes | | Ye | | |
| iou | SCE-SW | SCE_SW_HVAC_QK | SRes HVAC QIQM | Res | Residential | \$ 15,057,422.35 | funding to the Lead PA, SCG, for this statewide program Residential statewide program. SCE provides funding to the Lead PA, SCG, for this statewide | | x | x | x | xx | x x Resource | | | | | Yes | | | | Yes | | |
| iou | SCE-SW | SCE_SW_HVAC_Up_ | Upstream HVAC (Res) | Res | Residential | \$ 5,617,607.31 | Indiring to the Lead PA, SCG, for this seasened program. Residential statewide program. SCE provides funding to the Lead PA, SCG, for this statewide | | x x | x | x | x x | x x Resource | | | | | Yes | | | | Yes | | |
| 1 | | | | 1 | | | | | | 1 1 | - 1 - C | | | | | | | | | | | _ | - | Yes |
| IOU | SCE-SW | SCE-13-SW-001A | Energy Advisor Program (Summary Reliability) | Res | Residential | \$ 34,096,508.00 | Residential statewide program. SCE provides funding to the Lead PA, SCG, for this statewide recomment. | | x | х | x x | x x | x x Resource | | | | | | | | | | | |
| 10U 10U | SCE-SW SCE | SCE_SMB_Equity_00 | Wildan Commercial Energy Efficiency Program | Res Comm | Residential Commercial Commercial | \$ 16,179,863.00 \$ 88,741,577,01 | program Small Business HTR and DAC - Commercial NMEC | x x x | | x | x x | x x | x x Resource x x Resource x x Resource | Equity Resource Aquisition | | Yes | | Yes Y | Yes Yes Yes | Yes Yes | Yes | Yes Yes Ye | Yes | Yes |
| | SCE-SW SCE SCE SCE-SW | SCE_SM8_Equity_00 SCE_3P_2020RCL 00 SCE-13-SW-007A1 | OWBdan Commercial Energy Efficiency Program On-Bit Financing Loan Pool (non-residential) | Res Comm CC Fm | Residential Commercial Consercial Cross Cutting : Finance | \$ 16,179,863.00 \$ 88,741,577.01 \$ 38,500,000.00 | program Small Businesis HTR and DAC - Commercial NMEC Whole building commercial delwary Cross Cuting : Finance statewide program. SCE provides funding to the Lead PA, SCG, for this interestite sense. | x x x | | x | x x | xx | x x Resource x x Resource x x Resource Non-Resource | Equity Resource Aquisition | | Yes Yes | | Yes Y | Yes Yes Yes | Yes Yes | Yes Yes | Yes Ye | Yes Yes | Yes |
| | SCE-SW SCE SCE-SW SCE-SW | SCE_SMB_Equity_00 | Wildan Commercial Energy Efficiency Program | Res Comm CC Fin CC Fin | Residential Commercial Consercial Cross Cuting : Finance Cross Cuting : Finance (Public | \$ 16,179,863.00 \$ 86,741,577.01 \$ 36,500,000.00 \$ 5,234,764.00 | program Small Business HTR and DAC - Commercial NMEC Whole Sutting : Finance statewide program. SCE provides funding to the Lace PA, SCC, for this statewide program Creas Cutting : Finance (Public & Ag - SoCaREN) statewide program. SCE provides funding to the Lace PA, SCC, for this statewide | x x x | | x | x x | x x | x x Resource x x Resource x x Resource x x Resource Nor-Resource Nor-Resource | Equity Resource Aquistion | | Yes Yes | | Yes Y | Yes Yes Yes | Yes Yes | Yes Yes | Yes Ye | Yes S Yes | Yes |
| | SCE-SW SCE SCE-SW SCE-SW SCE-SW SCE SCE SCE | SCE_SMB_Equity_00 SCE_3P_2020RCI 00 SCE-13-SW-007A1 SCE-13-SW-007A SCE_MarketSupport_1 | Wildan Commiscial Energy Efficiency Program On-Bill Financing Loan Pool (non-residential) Dn-Bill Financing (OBF) EE Contractor Demand Building Program | CC Fin | Commercial | \$ 16,179,863.00 \$ 88,741,577.01 \$ 36,500,000.00 \$ 5,234,764.00 \$ 8,941,300.00 | program Small Businesis HTR and DAC - Commercial NMEC Whole building commercial delwary Cross Cuting : Finance statewide program. SCE provides funding to the Lead PA, SCG, for this interestite sense. | x | | × | x x | x x | x x Resource x x Resource x x Resource Non-Resource Non-Resource x Non-Resource x Non-Resource x Non-Resource Non-Resource x Non-Resource x Non-Resource x | Equily Resource Aquistion Market Support Market Support | | Yes | | Yes Y | Yes Yes Yes | Yes | Yes Yes | Yes Yes Ye | Yes Yes | Yes |
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| | SCE-SW SCE-SW SCE SCE SCE-SW | 22, MM, Lowh, SO 24, 13-20, 2017, 20 22, 2017, 2017, 20 20, 2017, 20 20, 2017, 20 20, 2017, 20 20, 2017, 20 20, 2017, 20 20, 20, 20 20, | Other Command Lenge (Neuro Agene) Order Preservice and Johnson Method Order Preservice and Johnson Method Order Preservice (Staffer) SE Contractor Denned Rubbing Pergen SE Frein Preservice Staffer Preservice Staffer Order Preservice Staffer Order Denned Rubbing Pergen Order Denned Rubbing Order Denned Rubing Order Denned Rubbing Order Order Denned Rubbing | Comm Comm Comm Comm Comm Comm Comm Comm | Connectal Connec | 1 14,173,450.00 1 84,173,457,657 2 84,957,857 3 35,555,050,00 5 35,555,050,00 5 4,557,550,00 5 4,557,550,00 5 4,557,550,00 5 4,557,550,00 5 4,557,550,00 5 4,557,550,00 5 7,557,550,00 5 3,758,750,00 5 3,758,750,00 5 3,524,550,00 5 3,524,550,00 5 3,524,550,00 5 3,524,550,00 5 3,524,550,00 5 3,524,550,00 5 3,524,550,00 5 3,524,550,00 6 3,524,550,00 6 3,524,550,00 6 3,524,550,00 6 3,524,550,00 7,550,550,00 5 1,550,550,00 5 1,550,550,00 5 1,550,500,00 5 < | The second secon | x x x x x x | | | X X X | | Image: section of the sectio | Rady Rady Roome Academ Mesone Academ Mesone Academ Rady Rady Rady Rady Rady Rady Rady Rady | | Yes Yes Yes Yes Yes Yes | Yes Yes Yes Yes | Yes | Yes Yes | Yes Yes Yes Yes Yes Yes Yes | Yes Ves Ves Ves Ves Ves | Yes Yes | Yes Yes Image: second se | Yes |
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| | Sold-Say | | Alex Constant Long Ethons yours Alex Transmit Long Ethons yours Alex Transmit Long University | CC Pin Course Co | Summerial Commercial C | 1 14, 17, 45, 10, 27 2 14, 17, 45, 10, 27 3 15, 55, 55, 50, 50 4 5, 55, 55, 50, 50 5 1, 27, 24, 50 5 1, 27, 24, 50 5 1, 27, 24, 50 5 1, 27, 24, 50 5 1, 27, 24, 50 5 1, 27, 24, 50 5 1, 27, 24, 50 5 1, 27, 24, 50 5 1, 27, 24, 50 5 1, 27, 24, 50 5 1, 27, 24, 50 6 1, 27, 24, 50 7 2, 34, 27, 50 6 1, 27, 24, 50 7 2, 34, 27, 50 7 1, 55, 53, 53 7 2, 34, 27, 50 7 2, 24, 24, 26, 37 7 2, 24, 24, 26, 37 8 1, 55, 55, 51 7 2, 34, 27, 35, 37 8 1, 55, 55, 51 7 3, 57, 56, 50 7 3, 57, 56, 50 7 3, 57, 58, 50 | And the second s | x x x x x x | | | | | Image: Section of the sectio | Codes and Standards Codes and Standards Codes and Standards Codes and Standards Codes and Standards Codes and Standards Market Support Market Support Market Support Market Support | | | Yes Yes | Yes - - - | | | Yes - - - | Yess Yes Image: Section of the sect | Image: second | Yes |
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| JCM. | PA | Program ID | Program Name | Sector | | | Target Audience | r | | | Tam | and Audienc | | | | | | | | | | | | an a | | | - |
|------------|------------|--------------------|---|-------------|--------------------------|----------------------------|---|--------|------|------|-------|-------------|-------|------|-----|------------------|---------|-------------------------------|---------|---------|------|------|---------|--|-------------|-----------------|-------------|
| KEY | | | | | Sector | 2024-2027 Budget | | Target | Comm | 10 N | w Mob | ale Rural | Sch S | F MF | HTR | AC Resource/Non- | Segment | Other Program Differentiators | Lightin | Applian | HVAC | Plug | Refrige | uato Liph | Ing HVAC | Whole V | fater Other |
| | | | | | | | | Audien | - | | | | | | | Resource | | | 8 | ces | | Load | ration | m Cont | ols Control | Buildin He g | ating |
| IOU | SCG | SCG3958 | RES-Residential Energy Efficiency Program - Equity | Res | Residential | \$8,151,942 | Residential Sector | х | | | | | | | | Resource | | | | Yes | Yes | | | | Yes | | Yes Yes |
| 10U | scg | 8CG3729 | WE&T-Integrated Energy Efficiency Training Program | WE&T | WE&T | \$7,502,480 | | | | | | | | | | Non-Resource | | | | | | | | | | | Yes |
| 10U | SCG | SCG3890 | AG-Agricultural Energy Efficiency Program | Ag | | \$8,000,000 | Agriculture | | | | | | | | | Resource | | | | Yes | Yes | Yes | | Yes | Yes | | Yes Yes |
| IOU | scg | SCG3901 | CC-Energy Program Outreach - Community Support Outreach Program | WEAT | WEST | \$1,925,157 | | | | | | | | | | Non-Resource | | | | | | | | | | | Yes |
| 10U | SCG | SCG3909 | Business Energy Calculated Incentive Program (BEES) | Comm | Commercial | \$612,363 | Commercial | | | | | | | | | Non-Resource | | | | | | | | | | | Yes |
| 10U | scc | SCG3909 | Business Energy Calculated Incentive Program (BEES) | Pub | Public | \$471,433 | Public | | | | | | | | | Non-Resource | | | | | | | | | | | Yes |
| 10U | scg | 8CG3909 | Business Energy Calculated Incentive Program (BEES) | Ind | Industrial | \$330,503 | Industrial | | | | | | | | | Non-Resource | | | | | | | | | | | Yes |
| 10U | scg | SCG3909 | Business Energy Calculated Incentive Program (REES) | Ag | Agricultural | \$189,571 | Agriculture | | | | | | | | | Non-Resource | | | | | | | | | | | Yes |
| 10U | SCG | SCG3887 | COM-Commercial-BEST (Resource Aquistion) | Comm | | \$3,577,558 | Commercial | | | | | | | | | Resource | | | | | Yes | | | Yes | Yes | | Yes Yes |
| 10U | SCG | SCG3834 | COM-LADWP Direct Install Program | Comm | | \$1,895,210 | Commercial | | | | | | | | | Resource | | | | Yes | | | | Yes | Yes | | Yes Yes |
| IOU | scg | SCG3892 | COM-Large Commercial Energy Efficiency Program | | Commercial | \$9,057,309 | Commercial | | | | | | | | | Resource | | | | Yes | Yes | Yes | | Yes | Yes | | Yes Yes |
| 10U | SCG | SCG3898 | | Comm | | \$1,164,537 | Commercial | | | | | | | | | Resource | | | | | | | | | | | Yes |
| IOU | SCG | SCG3891 | COM-Service RCx Large Commercial Program | Comm | Commercial | \$1,871,710 | Commercial | | | | | | | | | Resource | | | | Yes | | Yes | | Yes | Yes | | Yes Yes |
| 10U | SCG | SCG3937 | COM-Small and Medium Commercial EE Program (Equity) ⁷ | Comm | Commercial | \$8,996,848 | Commercial | | | | | | | | | Resource | | | | Yes | Yes | Yes | | Yes | Yes | | Yes Yes |
| 10U | scg | 8CG3882 | COM-Small and Medium Commercial EE Program (Resource Acquisition) | Comm | Commercial | \$4,607,110 | Commercial | | | | | | | | | Resource | | | | Yes | Yes | Yes | | Yes | Yes | | Yes Yes |
| 10U | SCG | SCG3899 | PUB-Large Public Sector | Pub | Public | \$3,743,381 | Public | | | | | | | | | Resource | | | | Yes | | Yes | | Yes | Yes | | Yes Yes |
| 2CU | SCG | SCG3888 | PUB-Public Direct Install Program | Pub | Public | \$8,951,908 | Public | | | | | | | | | Resource | | | | Yes | | | | | Yes | | Yes Yes |
| IOU | SCG | SCG3833 | RES-Burbank Water & Power Home Upgrade Program | Res | Residential | \$962,579 | Residential Sector | | | | | | | | | Resource | | | | | Yes | Yes | | Yes | Yes | | Yes Yes |
| 10U | SCG | SCG3861 | RES-Community Language Efficiency Outreach Program | Res | Residential | \$8,556,252 | Residential Inline langugage Outreach and Direct Install | | | | | | | | | Resource | | | | Yes | | | | | Yes | | Yes Yes |
| 10U | SCG | SCG3884 | RES-Comprehensive Mobile Home Program | Res | Residential | \$4,278,128 | Residential Sector | | | | x | | | | | Resource | | | | | Yes | Yes | | Yes | Yes | | Yes Yes |
| IOU | scg | SCG3764 | WEST-Educational Outreach Program / Living WISE | WEAT | WEST | \$3,777,778 | | | | | | | | | | Non-Resource | | | | | | | | | | | Yes |
| 2CU | SCG | SCG3829 | RES-Marketplace | Res | | \$8,558,252 | Residential Sector | | | х | x | x | x : | x | x | x Resource | | | | Yes | | | | | | | Yes Yes |
| IOU | scg | SCG3936 | RES-Multifamily Energy Allance Program (Equily) | Res | Residential | \$5,347,658 | MF Property Owners and Management Companies. Equity | × | | | | | | × | x | x Resource | | | | | Yes | Yes | | Yes | Yes | | Yes Yes |
| 10U | SCG | SCG3889 | RES-Multifamily Energy Alliance Program (Resource Aquisition) | Res | Residential | \$4,278,126 | MF Property Owners and Management Companies | | | | | | | х | | Resource | | | | | Yes | Yes | | Yes | Yes | | Yes Yes |
| 10U | scg | 8CG3705 | RES-Multifamily Whole Building Program (Equity) | Res | Residential | \$8,198,926 | MF Property Owners and Management Companies. Equity | x | | | | | | x | | Resource | | | | Yes | | Yes | | Yes | Yes | Yes | Yes Yes |
| IOU | scc | SCG3938 | RES-Multifamily Whole Building Program (Resource Aquisition) | Res | Residential | \$6,198,926 | MF Property Owners and Management Companies | | | | | | | х | | Resource | | | | Yes | | Yes | | Yes | Yes | Yes | Yes Yes |
| 10U | scg | SCG3832 | RES-Pasadena Water & Power Home Upgrade Program | Res | Residential | \$1,069,532 | Residential Sector | | | | | | | | | Resource | | | | | Yes | Yes | | Yes | Yes | | Yes Yes |
| 10U | SCG | SCG3935 | RES-Residential Advanced Clean Energy Program (Equity) | Res | Residential | \$7,486,721 | Equity | х | | | | | | | | Resource | | | | Yes | | | | | Yes | | Yes Yes |
| 10U | SCG | SCG3883 | RES-Reidential Advanced Clean Energy Program (Resource Acquisition) | Res | Residential | \$4,278,128 | Residential Sector. Equity | | | | | | | | | Resource | | | | | Yes | Yes | | Yes | Yes | | Yes Yes |
| 10U | SCG | SCG3824 | RES-Residential Behavioral Program | Res | Residential | \$8,888,888 | Residential Sector | | 1 | | | | | | | Resource | | | 1 | | Yes | | | Yes | Yes | | Yes Yes |
| IOU | SCG | SCG3885 | RFS, Residential Mobile Home Doosners | Res | Residential | \$3,743,361 | Residential Sector | | | | х | | | | | Resource | | | | | Yes | Yes | | Yes | Yes | | Yes Yes |
| 10U | SCG | SCG3760 | WE&T-HERS Ratar Training Program | WE&T | | \$962,579 | Residential/Commercial | | | | | | | | | Non-Resource | | | | | | | | | | | Yes |
| IOU | scg | SCG3830 | WE&T-Retail Partner Training Program | Res | Residential | \$2,352,969 | Residential Sector | | | | | | | | | Non-Resource | | | | | | | | | | 1 | Yes |
| | SCG | 8CG3714 8CG3939 | ND-Stategic Energy Management COM-Strategic Energy Management | Ind Comm | Industrial Commercial | \$1,110,740 \$4,529,570 | Industrial | - | 1 | | _ | - | | _ | | Resource | | | 1 | | | | | Yes | | | Yes |
| 10U 10U | SCG SCG | SCG3939 SCG3940 | COM-Strategic Energy Management COM_Commercial.8EST (Enub) ⁷ | Comm | Commercial | \$4,529,570 \$4,107,812 | Commercial | - | + + | | + | - | _ | + | | Resource | | | + | Yea | Yes | Yes | | Yes Yes | Yes | | Yes |
| IOU IOU | 800 800 | SCG3940 SCG3941 | COM-Commercial-BEST (Equity)' CC-Sustainability Studio | Rea | Residential | \$4,107,812 \$1,469,940 | Commercial Residential Sector | - | + + | | _ | - | | | | Non-Resource | | | 1 | TER | 263 | 1424 | | red . | TER | - | Yes |
| 100 | 800 | SCG3941 | CC-Sustainability Studio | Comm | Commercial | \$1,469,940 | Commercial | - | + + | | | + | _ | + | | Non-Resource | | | + | | | | - | _ | - | - | Yes |
| 100 | SCG | SCG3945 | ND-Innovations to Industriats (2) SEM | Ind | Industrial | \$3,750,790 | Industrial | - | + + | | | - | - | - | + + | Resource | | | 1 | Yes | Yes | Yes | - | Yes | Yes | | Yes Yes |
| iou | SCG | SCG3942 | ND-Industrial Savings, Training, Assistance, and Rebates (ISTAR) Program | Ind | Industrial | \$1,834,259 | Industrial | | | | | | | | | Resource | | | | Yes | Yes | Yes | | Yes | Yes | | Yes Yes |
| iou - | scg | SCG3943 | ND-Industrial Energy Partners (EP) Program | Ind | Industrial | \$8,704,687 | Industrial | - | 1 | | 1 | 1 | _ | 1 | | Resource | | | 1 | Yes | Yes | Yes | _ | Yes | Yes | - | Yes Yes |
| 10U | SCG | SCG3944 | ND-Refnery Gas Energy Efficiency (RGEEP) Processor | Ind | Industrial | \$11,311,439 | Industrial | | | | | | | | | Resource | | | | Yes | Yes | Yes | | Yes | Yes | | Yes Yes |
| iOU . | scc | 8CG3735 | FIN-On-88-Financing | Comm | Commercial | | Commercial | | | | | | | | | Non-Resource | | | | | | | _ | Yes | Yes | Yes | Yes Yes |
| L | 1 | 1 | | | 1 | | | | 1 | | | 1 | | _ | 1 | | 1 | | 1 | | | | | | | 1 | |