Southern California Regional Energy Network

Agriculture Project Delivery Program (Ag PDP) Implementation Plan

Prepared in accordance with guidance provided by:

Energy Efficiency Energy Division

California Public Utilities Commission, Version 4.0, April 2026

Contents

PROGRAM OVERVIEW 3

PROGRAM BUDGET AND SAVINGS INFORMATION 3

IMPLEMENTATION PLAN NARRATIVE 5

1. Program Description 5
2. Performance Tracking 6
3. Program Delivery and Customer Services 7
4. Program Design and Best Practices 11
5. Innovation 14
6. Pilots 15
7. Workforce Standards 15
8. Disadvantaged Worker Plan 15
9. Additional Information 15

SUPPORTING DOCUMENTS 16

1. Program Manual and Program Rules 16
2. Program Theory and Program Logic Model 18
3. Process Flow Chart 19
4. Measures and Incentives 20
5. Diagram of Program 21
6. Program Measurement and Verification (M&V) 22

PROGRAM MANUAL 23

1. Program Overview 23
2. Eligible Measures 23
3. Customer Eligibility Requirements 23
4. Contractor Eligibility Requirements 23
5. Participating Contractors, Manufacturers, Retailers, Distributors, and Partners 23
6. Additional Services 24
7. Audits 24
8. Program Quality Assurance Provisions 24
9. Other Program Metrics 24

Program Overview

The Southern California Regional Energy Network (SoCalREN) Agriculture Project Delivery Program (Ag-PDP) supports energy efficiency for small and medium agricultural operations in disadvantaged and rural communities. The program serves about 30,000 eligible customers in Southern California Edison and SoCalGas territories. It provides no-cost services to identify and implement energy-saving measures across various agricultural sectors. A third-party implementer manages the program and coordinates resources. Ag-PDP works with public agencies and water districts to connect customers to other SoCalREN offerings. The goal is to reduce energy use and costs while making energy efficiency a regular part of agricultural operations.

Program Budget and Savings Information

The budget and savings information for the Program are presented in the tables below.

Table 1. Program Budget and Savings Information

1	Program Name			SoCalREN Agriculture Project Delivery Program (Ag PDP)
2	Program ID number			SCR-AGR-G1
3	Program Implementer			SoCalREN + Third-Party (ICF)
4	Portfolio Administrator			County of Los Angeles/SoCalREN
5	Program Implementer Type			REN, Third-Party
6	Portfolio Segment			Market Support
7	Total Program Budget			$2,055,745
8	Program Budget by Year	**2025**	**2026**	**2027**
		$1,237,500	$720,000	$720,000
9	Program Duration			October 2025–December 2027
10	Total System Benefit (TSB)	**2025**	**2026**	**2027**
		N/A	N/A	N/A
11	CO2	**2026**	**2027**	
	Lifecycle Gross	N/A		
	First-Year Gross			
	First-Year Net			
12	KW	**2025**	**2026**	**2027**
	First-Year Gross	N/A		
	First-Year Net			
13	kWh	**2025**	**2026**	**2027**
	Lifecycle Gross	N/A		
	First-Year Gross			
	First-Year Net			
14	Therms	**2025**	**2026**	**2027**
	Lifecycle Gross	N/A		

	First-Year Gross			
	First-Year Net			
15	Pgm. Cost Effectiveness TRC	**2025**	**2026**	**2027**
	TRC by Year	N/A		
16	Pgm. Cost Effectiveness PAC	**2025**	**2026**	**2027**
	PAC by Year	N/A		
17	Market Sector			Agriculture
18	Program Type			Non-Resource
19	Delivery Type			Downstream
20	Intervention Strategies			Technical Assistance, Marketing and Outreach
21	M&V Methods			TBD

Implementation Plan Narrative

1. Program Description

The goal of the Southern California Regional Energy Network's (SoCalREN) Agriculture Sector is to identify and implement cost-effective energy efficiency projects that yield electricity and gas savings for disadvantaged, small and medium rural and underserved agriculture communities/customers across the region. To achieve this goal, the SoCalREN Agriculture Project Delivery Program (Ag-PDP) aims to achieve the following objectives:

- Expand the implementation of cost-effective energy efficiency projects;
- Make energy efficiency expertise accessible and available; and
- Integrate energy efficiency as a standard business practice for Agriculture customers.

The Ag-PDP offers energy efficiency services to eligible Agriculture customers in the Southern California Edison (SCE) and Southern California Gas (SoCalGas) service territories—including field & seed crops, fruit & nut crops, vegetables & melons, livestock & poultry, wineries, floriculture, and dairies—to help these customers reduce energy and maintenance costs at their facilities.

The Ag-PDP is delivered through a third-party implementer who designed the program and is responsible for securing and coordinating all program resources and services to meet all program objectives and targets. The Ag-PDP program will leverage established relationships from enrolled SoCalREN public agencies to engage local Ag customers and funnel energy savings to SoCalREN's Ag-Retrofit and Rural-HTR Agriculture Direct Install (Ag-DI) programs. Through the coordination with SoCalREN's public sector, water agencies and water special districts will be encouraged to promote the other SoCalREN Ag Programs (e.g., Agriculture WE&T (Ag-WE&T), Ag-PDP, Ag-DI, Ag-Retrofit, and Rural-HTR Agriculture Finance Assistance Program) to their end-use water customers.

At no cost to the Ag customers, the Ag-PDP identifies energy saving measures and works side-by-side with these customers throughout the project lifecycle, from performance specification to construction completion, to implement energy efficiency strategies.

Geographic Location of Offering

Agriculture (Ag) customers are primarily located in the heavily concentrated agricultural regions of the San Joaquin Valley (CTZ 13) and the Central Coast (CTZ 5) and will be targeted with a combination of direct customer outreach with additional support from trade allies such as agricultural engineering firms and farm equipment suppliers.

Although agricultural regions are concentrated in climate zones 13 and 5, customers outside of these climate zones are eligible to receive Ag-PDP services.

Eligible Customers

All agricultural (Ag) customers who have a valid Southern California Edison (SCE) & Southern California Gas Company (SoCalGas) service account are eligible to participate in SoCalREN Ag Programs. Ag customers are defined by two-digit North American Industry Classification System (NAICS) Code 11. Post-harvest production (e.g., wine production, nut drying, etc.) is eligible when performed directly on-farm as defined by NAICS Code 11. Agriculture sub-segments further defined by

four- digit NAICS Codes 1111, 1112, 1113, 1114 (including cannabis production which does not have a specific NAICS Code), 1119, 1121, 1122, 1123, 1124, 1125, 1129, 1131, 1132, 1133, 1141,1142, 1151, 1152 and 1153.

Measures

Ag-PDP is a market support program. Ag-PDP funnels energy savings to resource acquisition programs offered by SoCalREN, SCE, and SoCalGas.

Rationale

SoCalREN believes that the small and medium Ag customers in rural, disadvantaged communities will not be the primary focus of SCE and SoCalGas' third-party programs due to TRC constraints of greater than 1.0 and cost to serve. Due to the reduced avoided costs in 2024, SCE's and SoCalGas' third-party programs will have difficulty achieving their required TRC of 1.0 which will make it even harder for them to serve small and medium, rural, disadvantaged communities.

2. Performance Tracking

Program Performance Metrics

Metrics the program intends to track are summarized below.

Table 2. Program Performance Metrics

No.	Metric	Method	Frequency
1	Customer Enrollment	Number of Customers Enrolled in Ag-PDP Number of HTR, underserved, and/or DAC customers	Monthly
2	Increased Pipeline	Energy savings identified through completed audits to be installed in future years	Monthly
3	Outreach Hours	Number of staff and/or partner hours devoted to outreach initiatives	Monthly
4	Capacity & Expertise	Number of informational outreach activities conducted by SoCalREN	Monthly
5	Customized Services	Reporting of services leveraged as a percentage of completed projects	Annually
6	Educational Materials	Number of fact sheets, newsletters, and case studies generated by the SoCalREN program	Annually
7	Customer Satisfaction	Enrolled customer and contractor satisfaction rating as reported in annual program survey	Annually

No.	Metric	Method	Frequency
8	Completed Projects in Disadvantaged Communities	Percent of projects completed in disadvantaged communities	Annually

The necessary project information will be gathered through a series of discussions and verification checks with each customer. The Ag-PDP CRM database system will be used to track information about the customer, project, energy savings claimed and other details that will help show the impact of this program. This will be done on a quarterly basis and more frequently as needed. Once the information is gathered, it will be entered into the database and then used to generate reports. Savings will support overall SoCalREN Rural-HTR Ag DI and Ag-Retrofit programs.

Unique Value Metrics

Unique Value Metrics (UVMs) are the quantifiable measurements of activities that demonstrate SoCalREN's impacts. Each metric speaks directly to the value that SoCalREN provides to the State and the communities it serves. The SoCalREN Ag-PDP provides contributions to the following SoCalREN Market Support Segment UVMs:

- Increased demand for energy-efficient products or services among SoCalREN targeted groups
- Access to capital for green energy and energy-saving projects

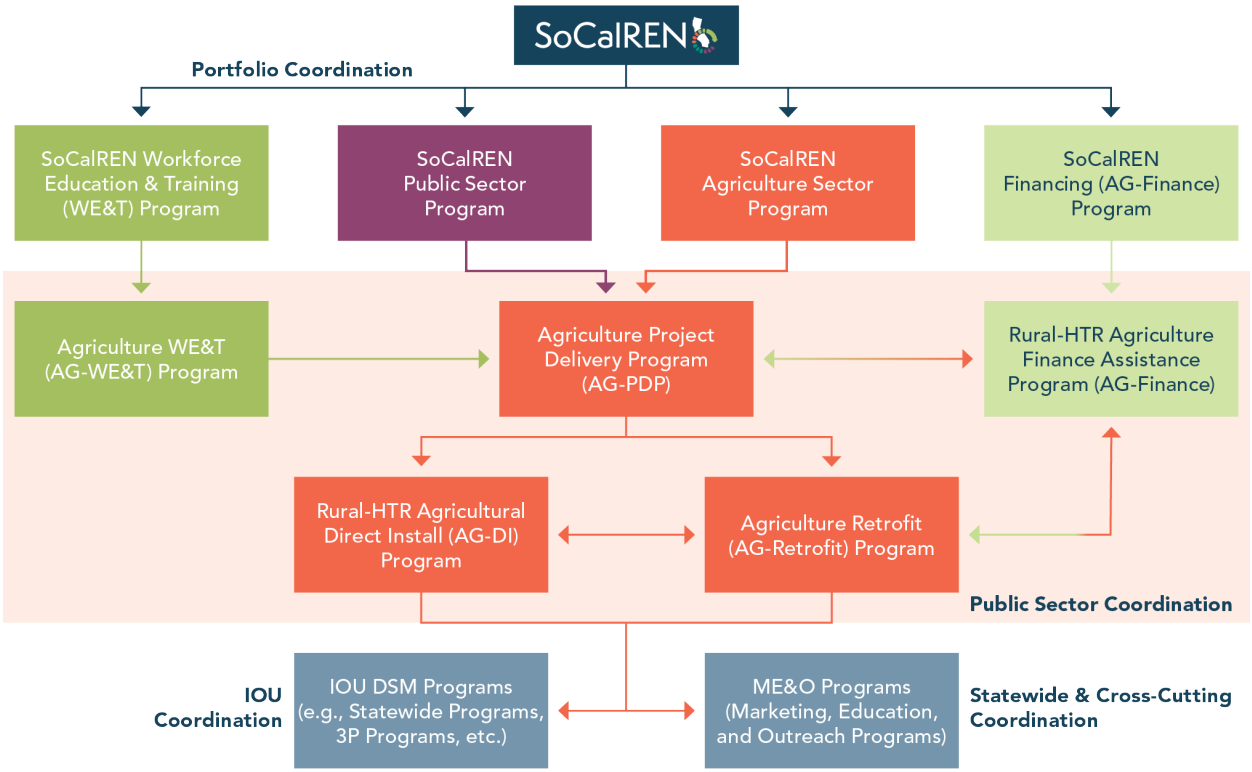
Quantitative Program Targets

Ag-PDP is a Market Support Program that works to support customers in participating in other programs, supporting those programs in achieving TSB goals.

3. Program Delivery and Customer Services

The Ag-Retrofit assists Ag customers with comprehensive and customized project management and technical engineering services through a third-party implementer to implement cost- effective and streamlined energy efficiency projects. The Ag-PDP actively works to ensure missed opportunities from other IOU offerings, such as the upstream, midstream are funneling these customers into the other SoCalREN Ag Programs (i.e., Ag-WE&T, Rural-HTR Ag-DI, Ag-Retrofit, and Rural-HTR Agriculture Finance Assistance). After enrollment into the program, each Ag customer is assigned a dedicated project delivery team comprised of project management staff and an assigned engineering firm. Throughout project identification and implementation, the project delivery team works with the customer to address project challenges and proactively identify solutions.

Figure 1. SoCalREN Ag Sector Design



Program Delivery Steps

Enrollment and Project Identification (Ag-PDP): A customer is considered enrolled in the Ag-PDP once it signs a non-binding enrollment form that acknowledges Ag-PDP participation, responsibilities, and services. The enrollment process begins with an initial engagement presentation to introduce SoCalREN Ag Programs in coordination with the IOUs, SoCalREN's Public Program, and other applicable program partners. The enrollment form is presented to the customer during this meeting; program services are not offered until the form is signed and returned. Enrollment in the Ag-PDP also gives customers access to other available SoCalREN Programs. Once enrolled, an Ag-PDP project manager is assigned to the customer to begin the project development process.

Education (Ag-WE&T): Promotion of the benefits of EE upgrades beyond utility cost savings considering crop/product quality improvement and building long-term relationships with the Ag customer as part of the education process. This includes general Ag training for Ag customers, Pump contractor training, Ag energy management, Ag water management, GHG reduction strategies, Ag emerging technologies, etc.

This will be coordinated with the SoCalREN WE&T program which provides the following training:

- LA County SoCalREN Introduction
- Climate Policy
- Sustainable Green Buildings Technologies
- How to Do Business with SoCalREN, SCE & SoCalGas
- Title 24 Codes and Regulations

- Estimating Energy Savings
- Project Estimating & Incentives
- Virtual Walk-Through
- Bonding Insurance/Access to Capital
- Estimating
- Project Scheduling
- Principles of Project Management

Benchmarking (Ag-PDP): After enrollment, the Ag-PDP engineer performs and prepares a customer-wide benchmark/energy analysis for the customer. The benchmark/analysis provides a portfolio-wide snapshot of energy consumption and cost by sector and estimates the potential energy and financial impacts of potential retrofits. The analysis is used as a tool to help identify and develop energy efficiency project opportunities. When possible, the benchmarking phase is completed in coordination with applicable program partners, such as SoCalREN's Public Sector Program and other SoCalREN Ag Programs (Rural-HTR Ag-DI and Ag-Retrofit). Coordination among partners ensures that a robust array of service offerings are provided to the customer, while also improving cost-effectiveness across programs and avoiding duplication of efforts. Other SoCalREN Ag Program offerings are also integrated during this phase, if applicable.

Audit (Ag-PDP): Once a project is identified, the Ag customer is asked to sign a project commitment form that communicates program services and records the customer's commitment to pursue a viable project prior to the investment of limited program resources. The Ag-PDP project manager will complete a detailed facility or site visit and identify a preliminary list of recommended energy efficiency measures to present to the customer. After the customer selects which energy efficiency measures to implement, the Ag-PDP Engineer prepares the audit calculations and a project proposal that recommends operational and maintenance improvements and/or upgrades to equipment and controls. The Project Feasibility Study (PFS) details the recommended measures and creates a business case for the implementation of recommended energy measures by providing estimated project costs, energy bill savings, available incentives, and financing solutions for the package of measures.

The Ag-PDP team will present the PFS to the customer for their approval. Upon approval the Ag-PDP team prepares the incentive application, the on-bill financing (OBF) application (if requested by the customer), and/or 3P financing options (see Rural-HTR Agriculture Finance Assistance Program) available to the customer (if applicable). Other financing options (e.g., grants, etc.) may also be applied for and pursued at this time.

Project Application Review (Ag-Retrofit and Rural-HTR Ag-DI): The Rural-HTR Ag-DI and Ag-Retrofit team review the PFS, associated audit calculations, and the OBF application. Upon their approval of the application package and the OBF application, the Rural-HTR Ag-DI and Ag-Retrofit team reserves the incentives and the OBF loan, for that customer and the team inform the customer of their notice-to-proceed.

Design and Procurement (Ag-PDP): The assigned Ag-PDP engineer completes technical performance specifications for the selected measures. If the customer releases a bid for project construction services, the Ag-PDP can provide procurement support in the form of supplementary bid package materials and sample language as required. If the customer is utilizing the Ag-PDP's simplified procurement method, a joint scope walk is scheduled at the site with the selected pre-qualified contractor, customer representative, and Ag-PDP project team.

The contractor provides feedback on the draft technical specifications and, if necessary, revises and finalizes them before a cost proposal is presented to the customer.

Customer Approval (Ag-Retrofit and Rural-HTR Ag-DI): The Ag-PDP project manager prepares a detailed project proposal package to assist the customer's staff with obtaining the necessary approvals for the project, which may include a staff report and draft resolution, scope of work, cost proposal, and any identified utility incentives and/or financing documents. The customer's relevant approval authority approves the project, submits the necessary signed documentation, and issues a purchase order to the contractor for construction services.

Construction (Ag-PDP): During the construction phase, the customer is the "project owner of record" responsible for all construction contracts and costs, as well as designating a construction manager. The customer may choose to manage the construction on its own, or access simplified construction management services through the Program Partners. The Ag-PDP project management team provides construction management support throughout the process, including review of contractor submittals and verification that the work is performed in accordance with the design specifications to ensure the expected energy savings are achieved and incentives are captured.

Commissioning Plan (Ag-PDP): Documented project intent provides the guide for contractors of a design intent that will guide the design of proposed Energy Conservation Measures (ECM), as well as define the Commissioning Plan for the testing of the installed systems and how they integrate with and affect the operation of existing building equipment. The Commissioning Plan will define how the proposed ECM should operate, guide the design and installation review and resulting requirements, and identify how the installed equipment/systems will be functionally tested. Tests include measurement of ECM performance to document energy savings potential (supporting M&V of energy savings) and demonstrate its improvement in or discover operating deficiencies to be corrected in the ECM equipment with which it interfaces.

Commissioning (Ag-PDP): Post installation, Ag-PDP will ensure that the energy efficiency measure has been properly commissioned. Commissioning of new equipment can be defined as "the process of ensuring that the systems are designed, installed, functionally tested and capable of being operated and maintained to perform in conformity with the project intent. This will be conducted per the Commissioning Plan.

Completion (Ag-PDP): Once the project is installed and verified, the Ag-PDP team will work with the customer and contractor to collect the information required to submit the appropriate project close-out information to the applicable resource program so the customer can receive incentives and the savings can be accrued for the project. The contractor is responsible for the transfer of all appropriate documentation, knowledge, and training to the customer and the facility management personnel for new installed equipment and/or operational changes. This package is assembled into the Installation Report (IR) and submitted to the Rural-HTR Ag DI and Ag-Retrofit team.

Project Installation Report Review (Ag-Retrofit and Rural-HTR Ag-DI): For the Rural-HTR Ag DI program a sampling of the installations will be inspected in order to assure that the project was installed. For the Ag-Retrofit, there will also be a post-installation inspection. The IR is then reviewed and approved by the Rural-HTR Ag DI and Ag-Retrofit Program team allowing the Rural-HTR Ag DI team to claim the savings, and the Ag-Retrofit pays out the incentive to the customer and claims its savings.

After project completion, the customer receives a survey to provide feedback on the impact of program services utilized to complete the energy efficiency project and how the program can improve.

Capacity Building (Ag-PDP): Outside of the project development services, enrolled customers are able to access expertise, resources, shared procurement strategies, best practices, and lessons learned in order to leverage the collective knowledge and expertise of the SoCalREN to better reduce costs and address common barriers. The Ag-PDP provides access to resources including project managers, technical advisors, engineering firms, contractors, financial advisory services, utilities, and other industry participants. Regular peer-to-peer sharing is also offered through workshops, newsletters, and other outreach methods.

Program Delivery Timeline

Table 3. Program Delivery Timeline

2025 Q4	2026	2027
• Execute contracts with delivery subcontractors • Finalize financing structure and Financial Mapping Tool setup • Initiate contractor training • Initiate marketing • Begin outreach & enrollment	• Continue outreach & enrollment • Annual reporting	• Continue outreach & enrollment • Shutdown Plan • Inform Stakeholders • Resolve open items • Final Program Report

4. Program Design and Best Practices

The Ag-PDP engages both downstream and midstream market channels. The primary channel is the end-use (downstream) customer, but the local vendor community (midstream) will be leveraged as an outreach channel to connect with their existing customer base. Customers are provided technical expertise devoted to identifying efficiency solutions that maintain current production at a lower operating cost. Incentives and financing are then used to facilitate project implementation by reducing first-cost barriers. The agricultural sector is relationship-driven and requires the proven tactic of direct, one-on-one interactions. Agriculture programs often fail because they underestimate the level of support needed by customers and assume that they operate similar to commercial or industrial programs. Agriculture customers approach efficiency very cautiously and are reluctant to adopt unfamiliar technologies. The Program's role is to work closely with the customer to overcome this reluctance. The level of support provided is the primary tactic used to drive higher levels of participation.

SCE and SoCalGas support services provided to the Program prior to launch to facilitate outreach and promotion include:

- List of all eligible agriculture customers with contact information (business name, contact name, phone, email if available), annual gas usage, and NAICS code/market segment
- Knowledge of past EE program participation and facility equipment for ag customers
- Quarterly updates of customer target list to identify new accounts

Due to the relationship-driven nature of the Ag customer base, the Program will collaborate with SoCalREN's Public sector and the IOUs' Account Executives (AEs) to make customer introductions, identify known project plans, identify current projects that need follow-up to move forward, etc. In addition, Ag-Retrofit will collaborate with the SoCalREN's Public sector to gain introductions to other Program stakeholders, such as vendors, trade allies, and manufacturers. SoCalREN will be provided marketing collateral, while the IOU AEs will provide contact information for SoCalREN's outreach staff.

After an initial Program overview meeting, a more focused meeting will be held with key account representatives of Ag customers to identify known projects, identify potential projects that need follow-up to move forward, etc.

Market Barriers

The fragmented way in which the energy industry currently delivers services and incentives makes it challenging to achieve deep energy retrofits. This results in multiple barriers to whole building retrofits and a "project delivery gap" for the customer. A key barrier for customers is understanding the benefits of implementing energy projects on a comprehensive scale. Further, Ag customers often lack sufficient in-house expertise and necessary financial resources. These are important challenges to solve because Ag customers are significant players in the energy field, both as consumers and as leaders of their communities. The Ag-PDP addresses these barriers by providing services to streamline energy efficiency project implementation with sustained technical assistance, and support in accessing project funding.

Best Practices

To help fill the "project delivery gap" and better enable customers to meet key challenges, the Ag-PDP has identified several best practices that are integrated into the project delivery process to ensure continued success. The Ag-PDP addresses the unique needs of the Ag customer and mitigates the need for customers to acquire their own in-house expertise and resources. Through a "one stop" approach, the Ag-PDP delivers comprehensive energy retrofit services, customizable to the customer's needs. Participating customers can take advantage of the full suite of offerings or select only the services that fit their needs.

The Ag-PDP aims for continuous improvement of implementation practices and systems to further improve and enhance the services received by Ag customers. Since the SoCalREN's Public Sector PDP's inception, it has been modified and streamlined to incorporate lessons learned from on the ground experience to design more effective systems for project delivery and implement more efficient tools and techniques and those lessons learned are incorporated into this SoCalREN's Ag-PDP. In addition to continuous improvement, there have been significant efforts to improve upon cost-effectiveness. Program strategies are evaluated and developed to control costs and ensure that the most efficient methods are deployed for project implementation.

Examples of cost-effective program strategies include:

- A Project Budget Tool that ensures appropriate allocation of program resources based on project and customer characteristics
- Development of a streamlined pathway for engineers to enter project budgets for approval to ensure alignment on project scope and deliverables

- Project Commitment forms integrated into the program process to confirm customer's buy-in more frequently as a project progresses and to ensure that PDP resources are carefully managed and delivered

Furthermore, the Ag-PDP has incorporated the following best practices into the program design:

Regional Partner Agency Engagement: Through regional partners, agencies and their customers will be engaged by the Ag-PDP across diverse climate zones, population sizes, population densities, and other demographic characteristics are targeted for engagement in order to ensure comprehensive service to the Southern California region, including services to disadvantaged communities.

In 2019, SoCalREN partners began partnering with regional community-based organizations and Council of Governments (COGs) to provide on-the-ground outreach and engagement to promote and enhance program services. Many of these organizations have established relationships with agencies working on energy efficiency efforts and have or continue to support agencies as were previous implementers of IOU Local Government Partnerships. The regional partner approach brings SoCalREN to increased enrollment opportunities, peer-to-peer sharing, and an increased number of energy projects, while customizing services to meet regional needs. Regional partners enhance SoCalREN's expertise and reach by leveraging their local knowledge, existing relationships with member agencies, and professional relationships that often extend beyond energy efficiency. This effort will continue through the SoCalREN Public sector and will drive customers to the Ag-PDP and other SoCalREN Ag Programs (e.g., Ag-WE&T, Rural-HTR Ag DI, Ag-Retrofit and Rural-HTR Ag Finance Assistance Programs).

Utility Coordination and Stakeholder Collaboration: The Ag-PDP promotes early and ongoing cooperation and collaboration with utility partners and stakeholders based on an agreed upon protocol as described in the Joint Cooperation Memo (JCM)[1]. Coordination among partners ensures that a robust array of service offerings are provided to the customer, while also improving cost-effectiveness across programs and avoiding duplication of efforts. A collaborative approach also improves the customer's experience and helps avoid confusion between programs.

Standardized Tools and Templates: A critical element to the Ag-PDP design is the continuous development and implementation of standardized tools and templates, including a comprehensive Project Delivery Manual (PDM). The PDM guides project managers and engineers to ensure quality control and application of best practices through the project delivery process.

Procurement Assistance: Assistance during the procurement process enables public agencies to move projects into the construction phase sooner and ensures the achievement and persistence of expected energy savings. Ag-PDP also offers access to a pool of highly-qualified specialty contractors that have been selected through a competitive process, further driving down project costs.

Financing Support: To overcome the significant hurdle of project funding, the project team helps identify and secure grant funding and project financing (see Rural-HTR Ag Finance Assistance Program). The Ag-PDP helps customers access and apply for a variety of funding and financing sources that include, but are not limited to, Energy Lease Financing (ELF), IOU on-bill financing (OBF), the California Energy Commission (CEC) low-interest loan program, and local self-funded financing opportunities. Please see the Rural-HTR Ag Finance Assistance Program for more information.

[1] https://socalren.org/sites/default/files/2024_2025_SoCal%20JCM_05-07-24.pdf

Marketing and Communications: Successful marketing and communications strategies are leveraged to drive program activities and enrollment.

Evaluation and Reporting: The Ag-PDP completes ongoing evaluation to ensure the goals and targets are met while keeping stakeholders fully informed of Ag-PDP operations and outcomes.

Workforce Development: The Ag-PDP supports workforce development initiatives by measuring and reporting on job creation metrics that drive the local economy.

Outreach to Disadvantaged Communities: The Ag-PDP has identified and enrolled customers serving disadvantaged communities, providing them with specialized services and deliverables.

Customer Satisfaction: The Ag-PDP will monitor customer feedback to identify program enhancements and ensure the highest level of customer satisfaction is achieved.

Peer-to-Peer Learning: The Ag-PDP seeks to build customer and contractor capacity and expertise in energy efficiency by providing customers and contractors with customized tools and resources that they would otherwise have to develop on their own, thereby saving time, money, and staff resources. The Ag-PDP also shares the strategies and best practices used by its agencies to overcome common barriers with other enrolled agencies by hosting webinars and presenting at conferences and workshops (see Ag-WE&T Program).

Collaboration with Trusted Industry Partners: Agricultural customers are known to approach energy efficiency improvement projects cautiously even when there is a compelling value proposition. To overcome this barrier, it is critical to work through trusted industry partners and communication channels. Ag-PDP leverages trade associations, agricultural cooperatives, university extension offices, equipment vendors, manufacturers, and other relevant stakeholders to connect with customers on a personal level.

5. Innovation

Program	Innovation: Strategy
Ag-PDP	**Delivery Approach:** • Deliver comprehensive, objective, and no-cost project management services from energy benchmarking and project identification through procurement and construction completion. • Streamline all EE program participation and delivery of savings benefits through a single, trusted channel - the SoCalREN Project Delivery Team. • Coordinate with SoCalREN Public Sector to enroll their Ag Customers into the Ag Program. **Market Strategy:** • Provide Ag Customers with access to benchmarking tools, reports, and training to improve staff's ability to better manage their energy consumption, plan projects, and ensure energy savings achieved persist over time. • Develop the adoption of new technologies in the market **Connecting the Dots:** The SoCalREN Ag Sector provides a turnkey solution through the various programs. The Ag programs are as follows:

Program	Innovation: Strategy
	• Ag-WE&T – Provides Workforce, Education and Training to Ag contractors and Ag customers • Ag-PDP – Provides ME&O for enrollment into the PDP program. PDP services include benchmarking, custom project development, financing support, commissioning support, and project closeout. • Rural-HTR Ag DI – Provides no-cost, low-cost installations of EE deemed measures • Ag-Retrofit – Provides EE custom measures support and project review facilitation • Rural-HTR Ag Finance Assistance – Provides OBF support, OBF bridge funding, 3P funding, grants, etc.

6. Pilots

This section is not applicable.

7. Workforce Standards[2]

This section is not applicable to this non-resource program. Please see Rural-HTR Ag DI and Ag-Retrofit Program for more information on HVAC and Lighting Measures.

8. Disadvantaged Worker Plan[3]

The Ag-PDP will provide Disadvantaged Workers with improved access to career opportunities in the energy efficiency industry by supporting outreach initiatives (training, mentorship, and/or apprenticeships) in collaboration with a combination of our subcontractor partners. Using an optional survey, the Ag-PDP will track and report Disadvantaged Worker participation in outreach programs, as well as program hiring, including the following metrics:

Disadvantage Worker Engagement Metrics
• Percentage of projects completed in Disadvantaged Communities • Percentage of job opportunities made available to Disadvantaged Workers

9. Additional Information

This section is not applicable.

[2] D.18-10-008, Ordering Paragraph 1-2 and Attachment B, Section A-B, page B-1.
[3] D.18-10-008, Attachment B, Section D, page B-9.

Supporting Documents

1. Program Manual and Program Rules

All information required in the table below is detailed in the SoCalREN Ag-PDP Manual.

Table 4. Program Manual Required Information Summary

#	Information Required	Short Description
1	**Eligible Measures or Measure Eligibility**	*A list of eligible measures, or measure eligibility requirements* Eligible measures pursued by Ag Customers through the program will adhere to the rules set forth by SoCalREN regarding measure eligibility. All savings will be transparent in supporting calculations as submitted through either the Rural-HTR Ag DI or Ag-Retrofit program.
2	**Customer Eligibility Requirements**	*Requirements for program participation (for example, annual energy use or peak kW demand)* The Ag-PDP will work with eligible customers in the Ag sector. This includes Field & Seed Crops, Fruit & Nut Crops, Vegetables & Melons, Livestock & Poultry, Wineries, Floriculture and Dairies Customers served by SCE and/or SoCalGas that pay PPP charges.
3	**Contractor Eligibility Requirements**	*List of any contractor (and/or developer, manufacturer, retailer or other "participant") eligibility requirements. (For example: specific IOU-required trainings, specific contractor accreditations, and/or specific technician certifications.)* The Ag-PDP will work with the selected contractor to ensure all incentive eligibility requirements are addressed and met.
4	**Participating Contractors, Manufacturers, Retailers, Distributors**	*Information as to whether:* • *Program or sub-program delivery channel is downstream, midstream, or upstream, and* • *Program is an incentive and/or buy-down type program.* This is a downstream program offering project development and project implementation services, with post-installation incentives offered through Ag-HTR-DI, an equity program, or Ag-Retrofit, which is a resource program.
5	**Additional Services**	Descriptions of any additional sub-program delivery, measure installation, marketing and outreach, training, and/or other services provided, if not yet described above. *The Ag-PDP will offer education outreach to Ag customers in SCE and SoCalGas territories. This educational outreach will include information on the benefits associated with utility-based energy saving measures.*

#	Information Required	Short Description
6	**Audits**	*Information as to whether:* • *Pre- and post-audits are required* • *Funding or incentive levels have been set for audits, and* • *The eligibility requirements for audit incentives.* Pre and post installation audits will be conducted in a manner that aligns with SoCalREN incentive eligibility requirements by both the Rural-HTR Ag DI and Ag-Retrofit Programs.
7	**Sub-Program Quality Assurance Provisions**	*List of quality assurance and quality control requirements, including accreditations and/or certifications or other credentials of individuals or organizations performing this work.* Quality assurance checks will be implemented throughout the process at various milestones to maintain data accuracy and customer satisfaction.
8	**Other Program Metrics**	*List all documentation and data used to calculate Program Metrics.* See table below

All EE measures will funnel through existing EE resource programs. The table below describes other tools leveraged to support turnkey project delivery services.

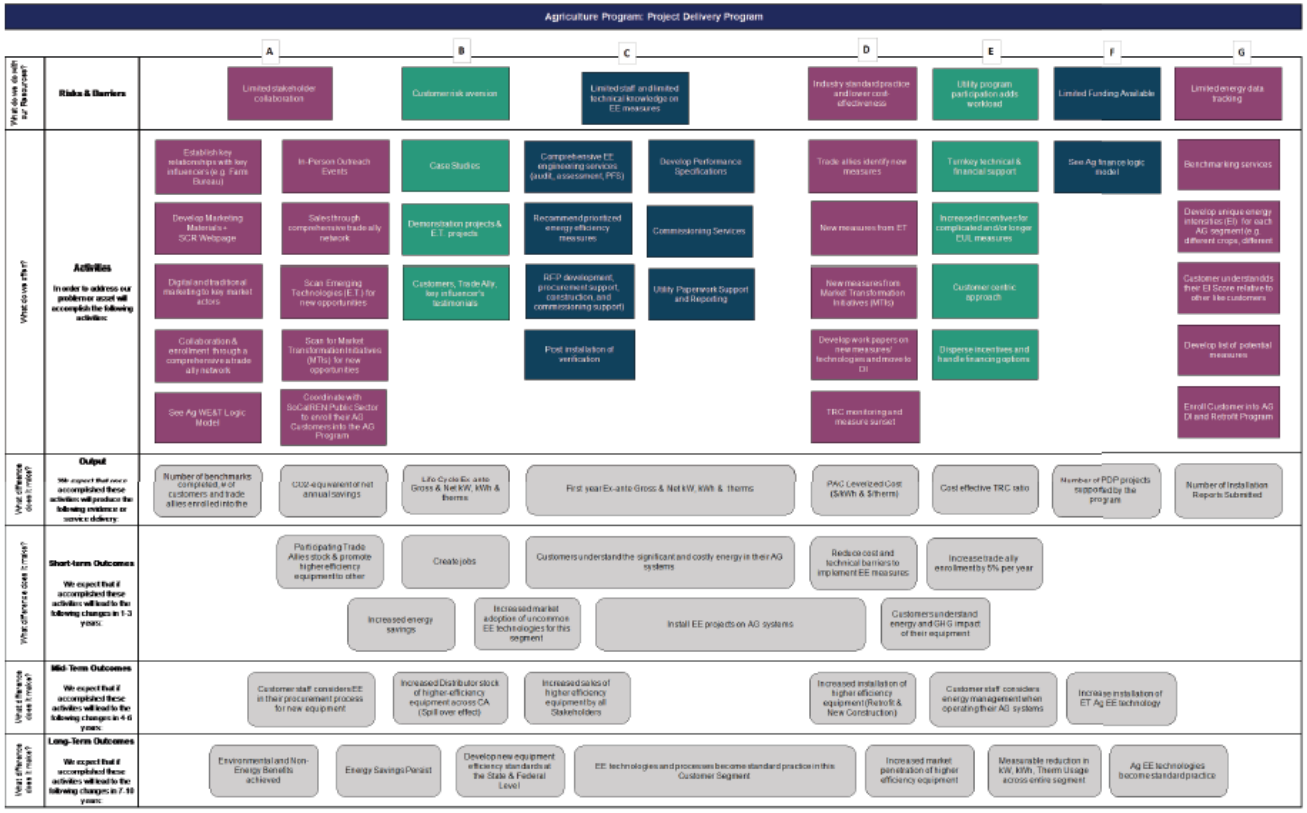
#	Tool	Short Description
1	PipeDrive	Customer Relationship Management (CRM), used to track projects and generate customer reports.
2	Compass	Platform used to collect and synthesize energy consumption data and deliver customer energy use analyses
3	ENERGY STAR® Portfolio Manager	Online tool used to track energy consumption and greenhouse gas emissions. Allows user to benchmark the performance of one building or a whole portfolio of buildings.
4	GIS	Geographic Information System (GIS) tool allows users to pinpoint exact locations of facilities and tie usage characteristics to those facilities.
5	ezIQC	Provides access to competitively awarded contractors through cooperative purchasing networks, expediting project delivery through a simplified procurement process.

2. Program Theory[4] and Program Logic Model[5]

Table 5. Program Theory Visualization (Logic Model)

Attachment 1: Ag-PDP Logic Model

Figure 3: SoCalREN Ag-PDP Logic Model



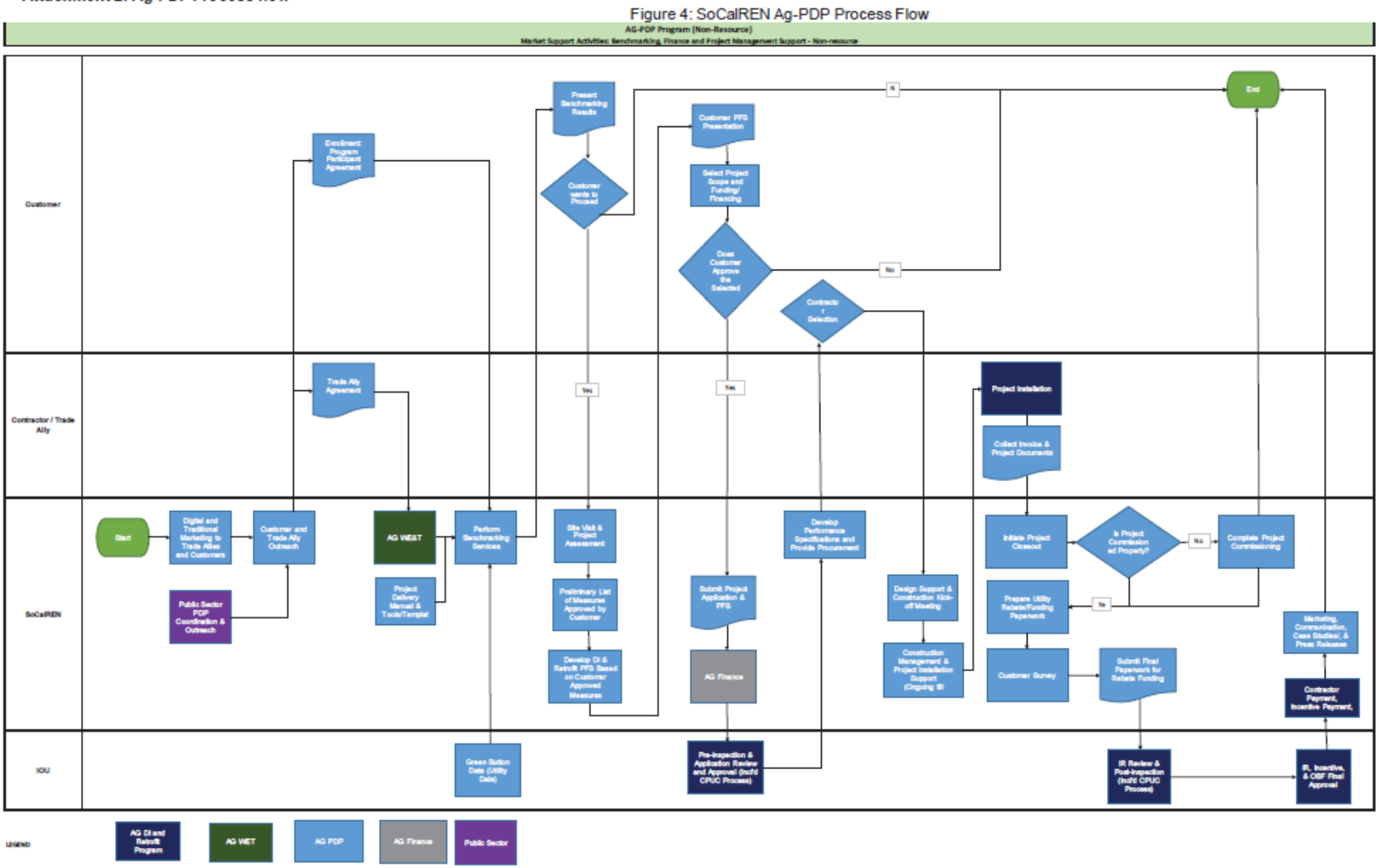
4 The expected causal relationships between program goals and program activities in a way that allows the reader to understand why the proposed program activities are expected to result in the accomplishment of the program goals. A well-developed program theory can (and should) also describe the barriers that will be overcome in order to accomplish the goals and clearly describe how the program activities are expected to overcome those barriers. California Evaluation Framework, June 2004.

5 The graphical representation of the program theory showing the flow between activities, their outputs, and subsequent short-term, intermediate, and long-term outcomes. California Evaluation Framework, June 2004.

3. Process Flow Chart

Figure 2. Process Flow Chart

Attachment 2: Ag-PDP Process flow



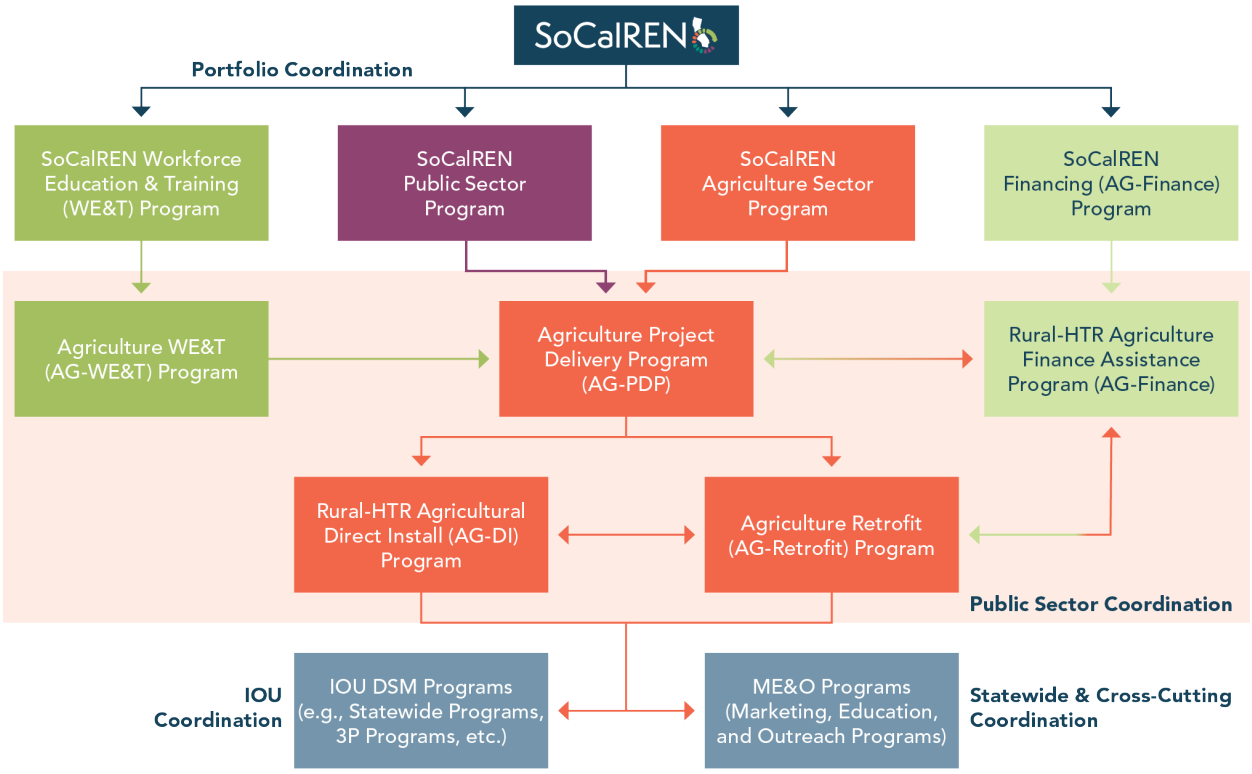
4. Measures and Incentives

This is a non-resource Market Support program that does not offer incentives.

5. Diagram of Program

The Diagram of the SoCalREN Ag-PDP is displayed below.

Figure 3. Diagram of Program



6. Program Measurement and Verification (M&V)

The Ag-PDP completes ongoing evaluation to ensure the goals and targets are met while keeping stakeholders fully informed of Ag-PDP operations and outcomes. A comprehensive workplan will be developed by SoCalREN's third-party EM&V team at the beginning of each year to identify the study needs in the portfolio, determine the timeframe and allocate the budget per study.

Normalized Metered Energy Consumption (NMEC), Multi-DER ISDM Pilot, and SEM Program requirements are not applicable to this program.

Program Manual

All programs must have manuals uploaded to CEDARS to clarify the eligibility requirements and rules of the program for implementers and customers. Program rules must comply with CPUC policies and rules. Table templates are available at CEDARS. At minimum, manuals should include:

1. Program Overview

The Southern California Regional Energy Network (SoCalREN) Agriculture Sector is focused on identifying and implementing cost-effective energy efficiency projects for small and medium-sized agricultural customers in disadvantaged and rural communities. The Agriculture Project Delivery Program (Ag-PDP) supports eligible customers located in the Southern California Edison (SCE) and Southern California Gas (SoCalGas) service areas. These customers include operations such as crop farms, dairies, wineries, and livestock facilities.

The program's objectives are to increase the implementation of energy efficiency projects, provide access to technical expertise, and support the integration of energy efficiency into routine agricultural operations. Ag-PDP is managed by a third-party implementer who coordinates all program resources and services. The implementer works directly with customers to identify energy-saving measures and supports them through the full project lifecycle, from initial assessment to construction completion.

Ag-PDP collaborates with SoCalREN-enrolled public agencies to engage agricultural customers and connect them to related programs such as Ag-Retrofit, Agriculture Direct Install (Ag-DI), and Agriculture Workforce Education and Training (Ag-WE&T). Water agencies and special districts are encouraged to promote these programs to their customers. All services provided through Ag-PDP are offered at no cost to participating agricultural customers.

2. Eligible Measures

Not Applicable

3. Customer Eligibility Requirements

All agricultural (Ag) customers who have a valid Southern California Edison (SCE) & Southern California Gas Company (SoCalGas) service account are eligible to participate in SoCalREN Ag Programs. Ag customers are defined by two-digit North American Industry Classification System (NAICS) Code 11. Post-harvest production (e.g., wine production, nut drying, etc.) is eligible when performed directly on-farm as defined by NAICS Code 11. Agriculture sub-segments further defined by four- digit NAICS Codes 1111, 1112, 1113, 1114 (including cannabis production which does not have a specific NAICS Code), 1119, 1121, 1122, 1123, 1124, 1125, 1129, 1131, 1132, 1133, 1141,1142, 1151, 1152 and 1153.

4. Contractor Eligibility Requirements

Not Applicable

5. Participating Contractors, Manufacturers, Retailers, Distributors, and Partners

Not Applicable

6. Additional Services

The Ag-PDP engages regional agencies and customers across Southern California through partnerships with community-based organizations and Councils of Governments. These partners support outreach in diverse climate zones and disadvantaged communities, leveraging existing relationships from prior energy efficiency efforts. Utility coordination is maintained through agreed protocols to ensure service alignment and avoid duplication. Standardized tools, including a Project Delivery Manual, guide project implementation. Procurement assistance helps agencies move projects to construction and access qualified contractors. Financing support includes help identifying funding sources such as on-bill financing, CEC loans, and SoCalREN's Revolving Loan Fund. Marketing and communications activities support program visibility. Evaluation and reporting are conducted regularly to track progress. Workforce development is supported through job creation metrics. Outreach efforts prioritize disadvantaged communities. Customer satisfaction is monitored through feedback. Peer-to-peer learning is facilitated via shared tools and best practices. Trusted industry partners such as trade associations and university extensions are used to build customer trust and engagement.

7. Audits

Once a project is identified, the Ag customer is asked to sign a project commitment form that communicates program services and records the customer's commitment to pursue a viable project prior to the investment of limited program resources. The Ag-PDP project manager will complete a detailed facility or site visit and identify a preliminary list of recommended energy efficiency measures to present to the customer. After the customer selects which energy efficiency measures to implement, the Ag-PDP Engineer prepares the audit calculations and a project proposal that recommends operational and maintenance improvements and/or upgrades to equipment and controls. The Project Feasibility Study (PFS) details the recommended measures and creates a business case for the implementation of recommended energy measures by providing estimated project costs, energy bill savings, available incentives, and financing solutions for the package of measures. The Ag-PDP team will present the PFS to the customer for their approval. Upon approval the Ag-PDP team prepares the incentive application, the on-bill financing (OBF) application (if requested by the customer), and/or third-party financing options (see Rural-HTR Agriculture Finance Assistance Program) available to the customer (if applicable). Other financing options (e.g., grants, etc.) may also be applied for and pursued at this time.

8. Program Quality Assurance Provisions

Quality assurance is maintained through use of the Contractor Management Portal (CMP) to track customer participation and feedback.

9. Other Program Metrics

Unique Value Metrics

- Increased demand for energy-efficient products or services among SoCalREN targeted groups
- Access to capital for green energy and energy-saving projects

Quantitative Program Targets

Ag-PDP is a Market Support Program that works to support customers in participating in other programs, supporting those programs in achieving TSB goals.