Southern California
REGIONAL ENERGY NETWORK

ENERGY EFFICIENCY PROGRAMS

SoCalREN Cross-cutting Sector

Community-Based Design Collaborative (CBDC)

Implementation Plan

TABLE OF CONTENTS

PROGRAM OVERVIEW 3
PROGRAM BUDGETS AND SAVINGS 3
IMPLEMENTATION PLAN NARRATIVE 5
Program Description 5
Primary Purpose 5
Rationale 6
Objectives 6
Performance Tracking 7
Program Delivery and Customer Services 9
Implementation Preparation 9
Service Delivery 9
Program Design and Best Practices 10
Strategies to Reduce Barriers 10
Best Practices/Lessons Learned 10
Innovation 11
Pilots 11
Workforce Education and Training 11
Workforce Standards 12
Disadvantaged Worker Plan 12
Market Access Programs 12
Additional Information 12
SUPPORTING DOCUMENTS 12
Program Manual and Program Rules 12
Program Theory and Program Logic Model 13
Process Flow Chart 14
Measures and Incentives 15
Diagram of Program 15
Program Measurement, and Verification (M&V) 15
Normalized Metered Energy Consumption (NMEC) 15
Multi-DER IDSM Pilots only 15
SEM Programs only 15
Appendix A. Program Manual 16
Eligible Measures or Measure Eligibility, if applicable 16
Customer Eligibility Requirements 16
Contractor Eligibility Requirements 16

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

Participating Contractors, Manufacturers, Retailers, Distributors, and Partners 16
Additional Services 16
Audits 17
Program Quality Assurance Provisions 17
Other Program Metrics 17
Data Management and Reporting Platforms 18

PROGRAM OVERVIEW

The Community-Based Design Collaborative (CBDC, or "Collaborative") was developed by SoCalREN and is designed to empower community leaders to actively shape and recommend how community-designed programs are developed, tested, and funded. It provides a streamlined way for innovative ideas to be incubated, refined, and connected with the necessary partners and resources.

The Collaborative offers a simplified application process and facilitator support for submitting and advancing new strategies that serve the unique and diverse needs of local and hard-to-reach (HTR) communities across the SoCalREN service territory. By fostering innovation and supporting both resource and non-resource initiatives aligned with SoCalREN's core values, the Collaborative creates a platform where community-driven solutions can be developed, evaluated, and potentially scaled to benefit multiple regions.

PROGRAM BUDGETS AND SAVINGS

Table 1: Program Budget and Savings		
1	Program Name	Community-Based Design Collaborative
2	Program ID number	SCR-CBDC-01
3	Program Implementer	The Energy Coalition
4	Portfolio Administrator	Southern California Regional Energy Network
5	Program Implementer Type (IOU Core, Third-Party Solicited, REN/CCA)	Third-party Solicited
6	Portfolio Segment (Resource Acquisition, Equity, Market Support, or Codes and Standards)[1]	Market Support
7	Total Program Budget	$2,841,070
8	Program Budget by Year	See Table 2
9	Program Duration (Start Date - End Date)	2026-2027
10	Total System Benefit (TSB) (Total Program TSB and TSB by Program Year)	N/A
11	CO_2 (Lifecycle, First Year, Net, Gross)	N/A
12	KW (First Year, Net, Gross)	N/A
12	KWh (Lifecycle, First Year, Net, Gross)	N/A
13	Therms (Lifecycle, First Year, Net, Gross)	N/A
14	Program Cost Effectiveness: Total Resource Cost (TRC): (Total TRC and TRC by Year)	N/A

[1] D.21-05-031 Ordering Paragraph 2

Table 1: Program Budget and Savings		
15	Program Cost Effectiveness: Program Administrator Cost (PAC): (Total PAC and PAC by Year)	N/A
16	Market Sector(s) (i.e., residential, commercial, industrial, agricultural, public or cross-cutting) If multi-sector, provide estimated % of the total budget for each sector)	Cross-cutting
17	Program Type (i.e., Non-resource, Resource)	Non-resource
18	Delivery Type(s) (i.e., Upstream-Manufactured, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install,[2] Codes & Standards)[3]	N/A
19	Intervention Strategies (e.g., Strategic Energy Management (SEM), Market Access Program (MAP), Direct Install, Incentive, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach, etc.)	Technical assistance, Marketing and Outreach/Information, Training, Facilitation, with additional services to be added as initiatives are approved
20	M&V Methods (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other (if applicable, describe Other M&V method))	The CBDC program (or Collaborative) is a non-resource program. As such, M&V for the program focuses on program performance metrics for services offered in alignment with CPUC and state goals.

Table 2: Program Budget and Expense Categories					
Year	**Incentive***	**Admin**	**Marketing and Outreach**	**Direct Implementation**	**Total**
2026	-	$20,000	$76,800	$1,280,000	**$1,376,800**
2027	-	$22,000	$82,770	$1,357,500	**$1,462,770**

**Note incentive budgets may be necessary in the future if resource initiatives are proposed and approved*

[2] https://cedars.sound-data.com/deer-resources/deemed-measure-packages/guidance/

[3] Database for Energy Efficiency Resources (DEER) 2026 Delivery Types

IMPLEMENTATION PLAN NARRATIVE

Program Description

The Community-Based Design Collaborative was launched to advance the CPUC's Environmental & Social Justice Action Plan by empowering communities to play a central role in the design of energy efficiency programs. SoCalREN has helped communities across Southern and Central California save energy, reduce greenhouse gas emissions, and achieve sustainability goals. The CBDC builds on more than a decade of SoCalREN experience.

Through the CBDC, SoCalREN partners with community-based organizations (CBOs) at every stage of program development to create innovative, impactful energy solutions that are responsive to local needs—particularly in hard-to-reach, underserved, and low-income communities. CBOs work alongside SoCalREN and its program implementer to identify the highest energy efficiency needs using their localized expertise, co-design programs, apply for funding, and evaluate program performance to determine scalability across the SoCalREN service territory.

CBOs may submit initiative applications through a facilitated cohort process on an ongoing basis, with technical support from SoCalREN throughout both application and implementation. Both resource and non-resource strategies that align with SoCalREN's core values are eligible. These partnerships ensure programs are shaped by the communities they serve, help decision-makers better understand energy-related gaps, and inspire solutions that deliver broader, more equitable benefits.

Primary Purpose

The primary purpose of the Community-Based Design Collaborative is to provide market support that strengthens the long-term success of the energy efficiency market through intentional community-based engagement and program design. The CBDC builds demand by increasing awareness and understanding of energy-efficient products and services, strengthens supply by supporting contractors and market actors through training and partnerships, advances innovation and accessibility by promoting cost-effective and locally responsive solutions, and expands access to capital by improving financing and program coordination. Underpinning all of this work is a strong commitment to equity—the framework is intentionally designed to support underserved communities and aligns with the CPUC's Environmental and Social Justice Action Plan Goal 5 by centering community leadership and ensuring energy efficiency benefits reach those most in need.

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

Rationale

SoCalREN led the implementation of its first Community-Based Design Collaborative which partnered with CBOs to develop a framework for identifying and funding local energy programs. SoCalREN has developed recommendations for a scalable, community-driven process that supports the design and implementation of energy program initiatives. The first cohort of the Collaborative included eight CBOs who participated in five meetings from January 2025 to June 2025. These meetings provided tools and resources to support CBOs in designing impactful energy programs. In return, CBOs provided input and support shaping the Collaborative framework.

The rationale for establishing the Collaborative is to shift away from traditional "top-down" program administration and instead embed equity at the beginning of program development. Local CBOs possess unique expertise in public health, environmental justice, and community trust that program administrators may lack.

By institutionalizing this co-creative model, SoCalREN aims to:

- Build local capacity by providing foundational energy education and technical assistance to under-resourced organizations.
- Fill funding gaps for communities that have historically been left behind by discontinued energy funding streams.
- Ensure regional relevance by allowing community partners to identify and solve specific local challenges.

Objectives

The CBDC framework is designed to achieve several key objectives:

- Build and maintain partnerships with community-based organizations to obtain delivery and/or funding efficiencies for energy efficiency products and/or services and added value for partners.
- Build demand for energy efficient products and services in all sectors and industries to ensure interest in, knowledge of benefits of, or awareness of how to obtain energy efficiency products and/or services.
- Enable greater, broader, and/or more equitable access to capital and program coordination to increase affordability of and investment in energy efficient projects, products, or services.
- Move beyond simple outreach to a model in which CBOs are formal partners in creating energy-efficiency initiatives.

- Provide one-on-one coaching, mentorship, and education on regulatory structures to empower CBOs to navigate the energy sector.
- Establish a replicable model and customizable programs that other regional energy networks and program administrators across California can adopt for their own portfolios.
- Focus on high-priority metrics identified by the community, including accessible services, equitable benefits, and youth workforce development.
- Provide financial support through stipends, honoraria, and milestone-based payments to ensure that small or under-resourced organizations can afford to participate in the design process.

Performance Tracking

Similar to the programs within the existing SoCalREN portfolio, CBDC will be reported monthly, quarterly, and annually through CEDARs.

CBDC will track and report on the following indicators, with specific metrics and targets to be established within the first year of implementation:

- Number of participating CBOs
- Number of meetings completed per CBO
- Number and type of initiatives proposed
- Initiative categories (education and outreach, direct support and upgrades, workforce development)
- Energy or non-energy impacts identified
- Community engagement activities conducted
- Stipends and support services provided

The Collaborative will track progress and impact across all approved initiatives, from application through implementation and (potential) scaling. As initiatives are approved, additional indicators will be refined to reflect the diversity of approaches and community needs. Potential future indicators and metrics could include:

- **Program Development and Reach**
    - Number of initiative applications submitted
    - Number of initiatives approved as customized offerings
    - Number of Environmental Justice (EJ) communities served
    - Initiatives scaled for broader implementation, with additional metrics defined as Collaborative initiatives are approved
- **Initiatives**

- **Education and Outreach**
  Initiatives focused on education and outreach, such as workshops, community education sessions, demonstrations, tabling, curriculum development, and general outreach, will be evaluated using metrics that include:
  - Number of workshops, presentations, or sessions delivered
  - Number of community engagement touchpoints
- **Direct Support and Upgrade**
  Initiatives providing direct support or energy efficiency upgrades, such as distributing energy-efficient devices, offering home-level support, or conducting direct installations, will be measured by:
  - Number and type of devices or equipment distributed (e.g., air purifiers, smart strips, portable air conditioning units)
  - Number of households engaged
- **Workforce Development**
  Initiatives centered on workforce development, including training programs, skill-building activities, youth engagement, and hands-on workforce preparedness, will be assessed using metrics such as:
  - Number of participants enrolled in training or workforce activities
  - Number of instructional hours delivered

The Collaborative framework itself is scalable, offering a replicable model for regional partnership development, stakeholder engagement, and shared priority-setting. Individual programs and initiatives developed within this framework will require tailored assessment to determine feasibility and effectiveness across diverse geographic and demographic contexts. Scalability of specific initiatives will be assessed based on:

- Alignment with the shared goals and success metrics.
- Outcome evaluations from initiatives identified through the first Collaborative cohort.
- Regional energy and equity needs that may require program customization.
- Community feedback and outcomes tied to local implementation efforts.

This approach ensures that the Collaborative model remains responsive and adaptive while maintaining consistency with ESJ Action Plan Goal 5 and broader CPUC objectives.

Program Delivery and Customer Services

The Collaborative is managed through a structured 18-month timeline divided into five distinct phases: framework development, CBO partner selection, collaborative meetings, community

engagement, and proposal development. The program specifically targets underserved communities and ESJ priority populations across the SoCalREN service territory.

Implementation Preparation

The program begins with a formal landscape analysis to identify target regions and eligible CBOs within those communities that have community trust and diverse expertise in public health, transportation, land use, and environmental justice. SoCalREN facilitates introductory discussions to provide details on the collaborative process and requirements for participation. Selected CBOs are formally onboarded through Memorandums of Understanding (MOUs) that outline participation tasks and expectations.

Service Delivery

The program delivers five structured meetings designed to provide foundational energy education, encourage peer learning, and foster the co-design of initiatives. SoCalREN is responsible for preparing materials and discussion structures for each collaborative meeting. CBOs may be provided with pre-meeting materials to help prepare them for specific meeting goals. Participants receive stipends for participation, outreach, and proposal development. The program utilizes milestone-based payments and honoraria to compensate CBOs for their time and expertise.

Throughout the collaborative process, SoCalREN provides extensive support services, including one-on-one coaching, mentorship, and education on regulatory structures and funding processes. This ensures that any participating organizations can navigate the complexities of the energy sector while designing initiatives.

CBO partners are expected to conduct outreach within their communities to solicit input from their constituents, ensuring that program designs reflect high-priority community needs. SoCalREN may develop tools to support CBO outreach, including surveys and program marketing materials.

SoCalREN helps CBOs shape their initiative ideas into formal proposals. Technical assistance includes budget planning, establishing metrics and tracking methods, and strengthening initiative elements to align with SoCalREN's program goals.

Program Design and Best Practices

Strategies to Reduce Barriers

Based on SoCalREN's experience, strategies to reduce barriers to implementing a community-based design collaborative project fall into the following categories:

- Provide monetary stipends to compensate CBOs for staff time and travel expenses spent on the Collaborative.
- Use consensus-based decision-making processes and build in intentional avenues for collaborative members to provide meaningful feedback.
- Offer multiple engagement opportunities, including group and one-on-one meetings.
- Ensure in-person meetings and events are held at centrally located venues, given the collaborative members' working locations.
- Develop and spend time on introductory training material and resources. Do not assume that terms, concepts, and acronyms that are commonly understood among energy efficiency professionals are widely understood by community-based organization staff.

These strategies were used by SoCalREN when developing the Collaborative. Between January and June 2025, the Collaborative held five meetings: two in-person (with optional virtual participation) and three virtual-only. The original bi-monthly meeting schedule was adjusted to maintain participant engagement and minimize loss of content knowledge between meetings. To improve accessibility, in-person meetings were held at centrally located venues that were geographically convenient for Collaborative members across the four participating counties. To ensure participation, $10,000 stipends were provided, with a payment structure of $2,000 per meeting attendance and an additional $2,000 for Collaborative members who conducted additional outreach activities.

The Collaborative primarily used a consensus-based decision-making process, encouraging all members to contribute to the co-development of the Collaborative framework. To support inclusive participation and equitable input, a variety of tools and engagement strategies were employed. These included facilitated group brainstorming exercises during meetings, individual follow-up conversations to accommodate various communication styles, and outreach surveys to gather additional feedback from community members.

Best Practices/Lessons Learned

Best practices identified throughout The Collaborative's lifecycle built support for Collaborative members from program administrators and fall into the following categories:

- Facilitate learning environments that build a high-level understanding of energy programs, regulatory structures, and funding processes.
- Provide technical assistance and mentorship.
- Create opportunities for CBOs to learn from each other, share best practices, and co-develop strategies through regular meetings.
- Lower barriers by providing administrative support, facilitating meetings, and preparing logistics, so that CBOs can focus on engagement and innovation.

- Help CBOs build relationships with implementers, technical partners, and local governments to strengthen future implementation of initiatives/programs.
- Select participating applicants who have experience implementing community programs and/or show strong community trust and partnerships.
- Identify shared priorities for community-based programming, including main objectives and corresponding success metrics, in a collaborative process.

To ensure consistency, transparency, and alignment with statewide equity and clean energy goals, the following criteria are recommended for evaluating and supporting community-based program proposals developed through the Collaborative process. These criteria are intended to support a wide range of program types, including those that may not follow traditional energy efficiency pathways, while maintaining alignment with the Collaborative's recommendations and the CPUC's ESJ Action Plan.

- Alignment with energy and equity outcomes.
- Demonstrated community leadership and co-design.

Innovation

The CBDC advances innovative, community-driven energy efficiency program design by centering CBOs as co-designers. Through a flexible, supported initiative application process and ongoing technical assistance from SoCalREN, CBOs receive comprehensive support to develop and implement initiatives that address local energy needs.

To-Code Savings Claims

Not applicable for this program.

Pilots

Not applicable for this program.

Workforce Education and Training

Not applicable for this program.

Workforce Standards

Not applicable for this program.

Disadvantaged Worker Plan

Not applicable for this program; however, CBDC will prioritize serving hard-to-reach and disadvantaged communities and will coordinate with SoCalREN's workforce programs as applicable.

Market Access Programs

Not applicable for this program.

Additional Information

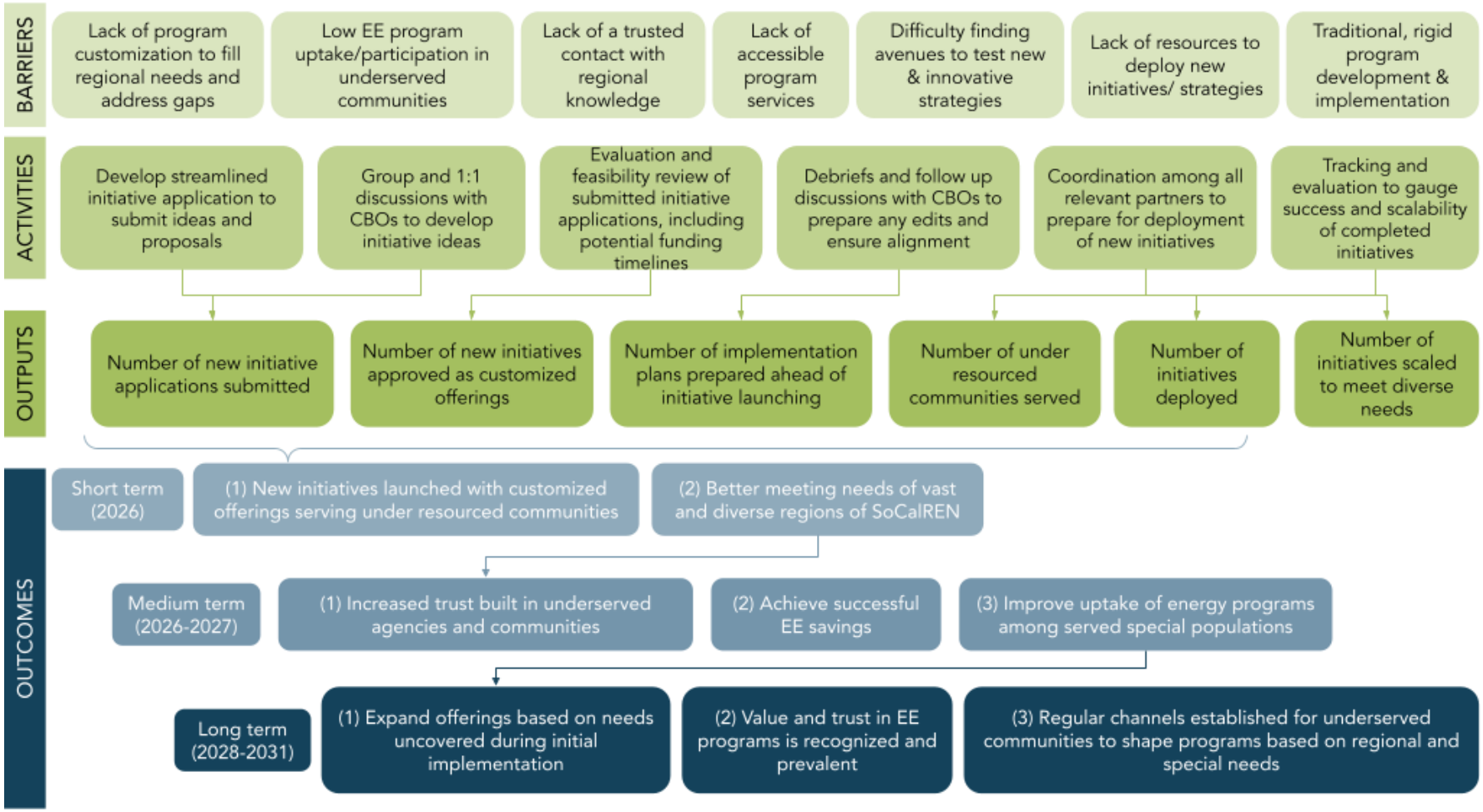
Pursuant to CPUC Decision D.23-06-055 Ordering Paragraph (OP) 30, SoCalREN initiated a community-based Design Collaborative to advance a community-driven, equity-centered approach to energy efficiency program design. On September 30, 2025, SoCalREN filed Advice Letter 22-E/22-G containing the Community-Based Design Collaborative's developed process for funding community programs, and a plan for piloting the approach in 2026 and 2027. As directed in Decision D. 23-06-055, Southern California Regional Energy Network (SoCalREN) submitted a Tier 2 Advice Letter seeking approval of a new Community-Based Design Collaborative Program in the market support segment with the initial cohort's initiatives for 2026 and 2027 totaling to $1,337,500, an amount within the $1.5 million authorized. That Advice Letter was approved on January 22, 2026.

SUPPORTING DOCUMENTS

Program Manual and Program Rules

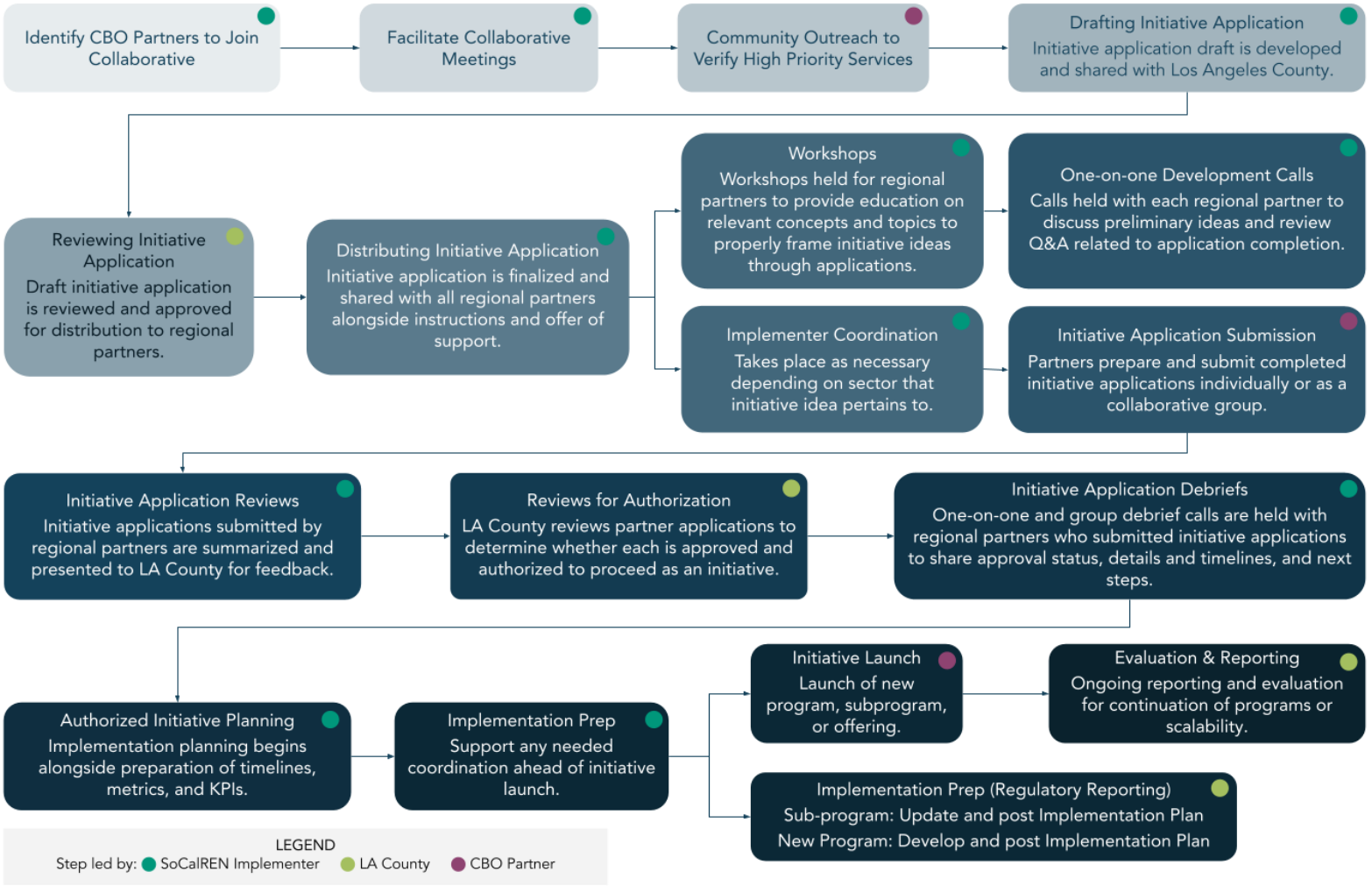
The Program Manual and Program Rules document is included as an attachment titled, "Appendix A. Program Manual."

Program Theory and Program Logic Model



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

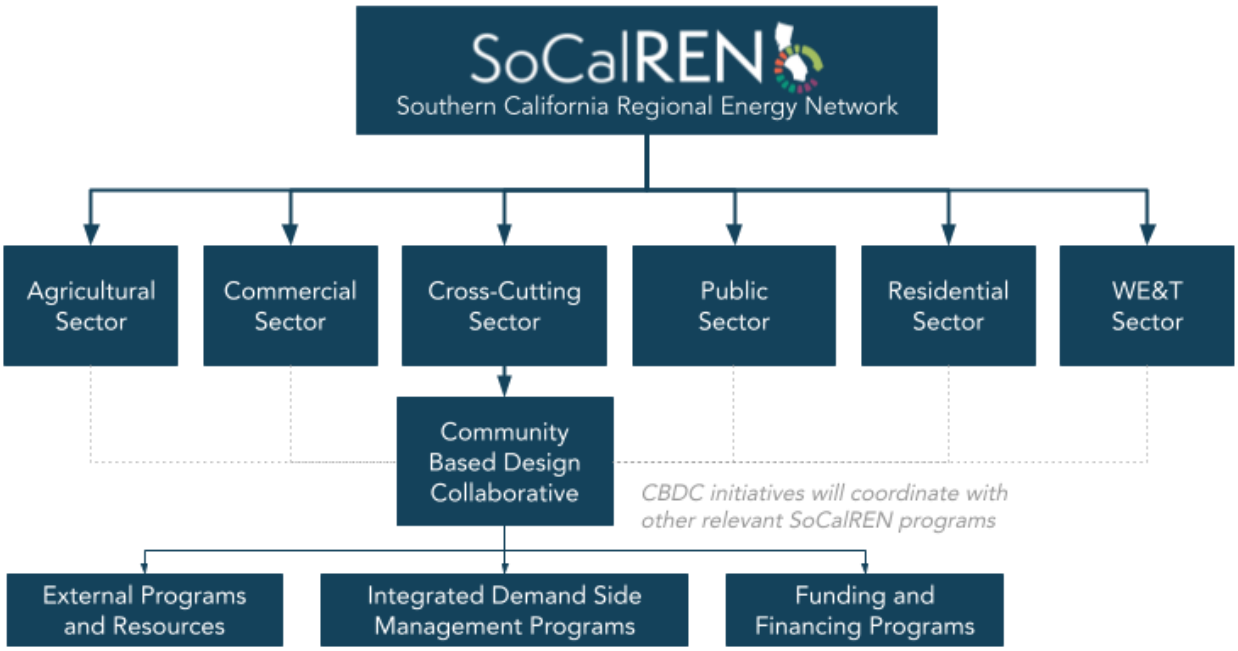
Process Flow Chart



Measures and Incentives

Not applicable for this program.

Diagram of Program



Program Measurement, and Verification (M&V)

The CBDC program, or Collaborative, is a non-resource program. As such, M&V for the program focuses on program performance metrics for services offered in alignment with CPUC and state goals.

Normalized Metered Energy Consumption (NMEC)

Not applicable for this program.

Multi-DER IDSM Pilots only

Not applicable for this program.

SEM Programs only

Not applicable for this program.

Appendix A. Program Manual

Eligible Measures or Measure Eligibility, if applicable

Provide requirements for measure eligibility or a list of eligible measures.

The Community-based Design Collaborative (CBDC or "Collaborative") does not directly contain energy efficiency measures. If/when measures are requested and approved through approved initiatives, this manual will be updated to reflect this change.

Customer Eligibility Requirements

Provide requirements for program participation (e.g., annual energy use, peak kW demand, NAICS code).

The Collaborative will serve community-based organizations (CBOs) and their communities across SoCalREN's service territory, covering 13 counties.

Contractor Eligibility Requirements

Provide requirements for program participation (e.g., annual energy use, peak kW demand, NAICS code).

There are no contractors directly performing installations as part of this program. If this changes in the future, this manual will be updated.

Participating Contractors, Manufacturers, Retailers, Distributors, and Partners

For upstream or midstream incentives and/or buy down programs indicate, if applicable.

This section does not apply as incentives are not a part of this program. If this changes in the future, this program manual will be updated.

Additional Services

Briefly describe any additional sub-program delivery and measure installation and/or marketing & outreach, training, and/or other services provided, if not yet described above.

SoCalREN's CBDC will serve CBOs and their communities, supporting community leadership by identifying Collaborative partners and structuring meetings to encourage participation from

organizations serving equity-priority communities, in alignment with the intent of CPUC ESJ Action Plan Goal 5. By engaging a geographically and programmatically diverse group of CBOs, and by incorporating flexible meeting formats, educational content, and varied methods of input, the Collaborative aims to support informed and inclusive participation. This structure provides space for Collaborative members to contribute local insights to program design discussions and have a space where a range of perspectives can be shared and considered. These services also include:

- Facilitation with partnerships and participation with other programs.
- Stipends for CBO participation in the program.
- Direct funding for approved initiatives when appropriate and allowable.
- Culturally competent outreach to build trust with communities through respectful engagement which meets their specific cultural values, beliefs, and norms.
- Education and training to familiarize CBO staff with energy efficiency technologies and opportunities to fully leverage existing programs and participate in shaping new ones.

Audits

Indicate whether pre- and/or post-audits are required, if there is funding or incentive levels set for audits, eligibility requirements for audit incentives, which demand side resources will be included within the audit's scope and who will perform the audit.

This section does not apply to this program as pre-and/or post-audits and incentives are not directly included. If this changes in the future, this program manual will be updated.

Program Quality Assurance Provisions

SoCalREN has developed monitoring and evaluation tools to assist with quality assurance. Progress toward quantifiable outcomes will be monitored using the metrics and key performance indicators (KPIs). Both program participants and partners will be asked to provide feedback throughout the program.

Other Program Metrics

Reports on program outputs and key performance indicators (KPIs) will be provided to SoCalREN. These reports will document program activities, successes, and other relevant information as requested to support transparency and continuous improvement.

Data Management and Reporting Platforms

CBDC will utilize the Implementers' Salesforce Customer Relationship Management (CRM) platform to track program activities, participant information, and project delivery milestones.