ENERGY EFFICIENCY PROGRAMS

SoCalREN Commercial Sector
Food Desert Energy Efficiency Equity Program
Program Implementation Plan

Prepared by the County of Los Angeles on behalf
of the Southern California Regional Energy Network

April 2025
Version 2.0

Program ID: SCR-COM-E3

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Program Overview

The California Public Utilities Commission's Environmental and Social Justice (ESJ) Action Plan calls for expanded access to energy efficiency programs for equity populations. The SoCalREN Food Desert Energy Efficiency Equity (FDEEE) addresses this need by leveraging external funding sources and focuses on energy efficiency improvements in equity defined communities.

The intent of the SoCalREN FDEEE approach is to provide new energy efficient commercial refrigeration units while reducing participants' total utility cost burden. When the program installs new or resized commercial refrigeration, it may increase overall energy use. To ensure the program delivers utility cost savings and community benefit, FDEEE will offer an expanded measure list to prioritize bill savings for the customer.

Program Budget and Savings

Table 1: Program Budget and Savings		
1	Program Name	Food Desert Energy Efficiency Equity Program
2	Program ID number	SCR-COM-E3
3	Program Implementer	SoCalREN
4	Portfolio Administrator	SoCalREN
5	Program Implementer Type (IOU Core, Third-Party Solicited, REN/CCA)	REN
6	Portfolio Segment (Resource Acquisition, Equity, Market Support, or Codes and Standards)[1]	Equity
7	Total Program Budget	$13,942,714.00
8	Program Budget by Year	2025 - $3,649,369.00 2026 - $5,295,720.00 2027 - $4,997,626.00
9	Program Duration (Start Date - End Date)	2024-2027
10	Total System Benefit (TSB) (Total Program TSB and TSB by Program Year)	$4,750,084.00
11	CO_2 (Lifecycle, First Year, Net, Gross)	Lifecycle Net – 16,090 First Year Net – 2,662 Lifecycle Gross – 17,097 First Year Gross – 1,557
12	KW (First Year, Net, Gross)	Net – 177 Gross - 199
12	KWh (Lifecycle, First Year, Net, Gross)	Lifecycle Net – 2,286,474 First Year Net – 368,616 First Year Gross – 679,954
13	Therms (Lifecycle, First Year, Net, Gross)	Lifecycle Net – 2,972,993 First Year Net – 265,859 First Year Gross – 264,889

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

Table 1: Program Budget and Savings		
14	Program Cost Effectiveness: Total Resource Cost (TRC): (Total TRC and TRC by Year)	2025 – 0.36 2026 – 0.51 2027 – 0.31 Total – 0.40
15	Program Cost Effectiveness: Program Administrator Cost (PAC): (Total PAC and PAC by Year)	2025 – 0.37 2026 – 0.52 2027 – 0.32 Total - 0.41
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)	Commercial
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]	Downstream – Direct-Install
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.)	Direct Install, Technical Assistance, Education, Outreach and Marketing
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))	Other

Implementation Plan Narrative

1. Program Description

The Food Desert Energy Efficiency Equity (FDEEE) program will improve access for equity targeted corner stores (or their equivalents, such as neighborhood stores, bodegas, convenience stores, or mom and pop stores – all called "corner stores" for purposes of this program), small business grocers, food distribution centers, small restaurants, and cafes in food deserts throughout the SoCalREN territory. 100% of customers will qualify as hard-to-reach customers, further identified through Low Income Low Access (LILA) and Disadvantaged Communities (DAC) zip codes.

The program will be offered in coordination with the SoCalREN Hard-to-Reach Commercial Direct Install (CDI) Program and the SoCalREN HTR Business Energy Advisor (BEA) Program.

Purpose

The SoCalREN FDEEE program addresses the current challenges within food deserts, reduces GHG emissions while promoting healthy food options in low-income communities,

[2] https://cedars.sound-data.com/deer-resources/deemed-measure-packages/guidance/
[3] Database for Energy Efficiency Resources (DEER) 2026 Delivery Types

and provides education, outreach, technical assistance support to hard-to-reach businesses regarding energy efficiency upgrades and the benefits of offering healthy food options.

The impact of the FDEEE program will go beyond just the corner stores and small business owners. Communities located within food deserts experience additional challenges that we aim to address through this program.

- **Health Impacts:** People living in food deserts, who often rely on fast food, have seven times the risk of having a stroke before age 45, double the risk of heart attack and type 2 diabetes, and four times the risk of kidney failure *(Food Revolution Network, September 2020).*

- **Economic Impacts:** Food insecurity is heightened in food desert communities. "Food security is the physical and economic access to sufficient nutritious foods by all people at all times. When this access is disrupted or limited, food insecurity occurs." *(Healthline, June 2021).*
- **Access Impacts:** Include culturally relevant foods for communities. "The need for culturally relevant foods is also a critical element of programs like these. Sometimes known as culturally specific, sensitive, or appropriate foods, these are staple foods in the diet of a given community... posing a potential barrier to eating fresh foods for people who shop close to home." (Civil Eats, February 2022).

Rationale

Equity customers require an additional level of support to address utility cost increases, without programs specifically designed to meet the needs of these customers who will be disproportionally impacted by these increases. Traditional IOU programs have focused on larger savings opportunities, and these stores have been underserved by current offerings.

The program will leverage external funding sources to offset costs. For example, some new refrigeration units through the California Department of Food and Agriculture (CDFA) and water heating though the South Coast Air Quality Management District will offset the incentive cost to the program and the burden to the ratepayer and allow us to serve more customers.

The program will target corner stores in food deserts, and the stores will become the central hub in the community to highlight the benefits and impacts of the SoCalREN commercial programs throughout the community. The program will collaborate with local food suppliers, community-based organizations, and local governments to bolster economic growth and investment in each community.

The program will have spillover effects that go beyond equity measurements. These include resource acquisition measures through electric and gas savings, and market support benefits by recruiting, training, and working with local contractors on a community-by-community basis.

2. Performance Tracking

Similar to the programs within the existing SoCalREN portfolio, the FDEEE will be reported monthly, quarterly, and annually through CEDARs. In addition to the CPUC required common metrics, the SoCalREN FDEEE proposed program will include the collection and tracking of the following data/performance metrics:

The Primary Performance Metrics, as specified by Table 1 above are:

- Total System Benefit (TSB) ($)
- TRC Ratio

The following Indicators are used to track program progress:

- Actual/Forecasted TSB ($)
- Actual/Forecasted peak demand savings (kW)
- Actual/Forecasted energy savings (kWh/Therms)

The following additional non-savings program Metrics are tracked:

Table 2: Metrics

Metric	Method
Number of equity-targeted stores enrolled	Count of stores
Number of new energy-efficient refrigeration units installed and replaced	Count of refrigeration units installed and replaced
Number of equity-targeted store owners and/or employees that receive training	Count of store owners and/or employees engaged in training
Outside dollars leveraged to support customers	Amount of outside funding received by program participants
Number of equity-targeted customers engaged	Count of customers reached through outreach events and other educational or outreach activities
Number of stores surveyed pre/post refrigeration	Count of completed pre and post-surveys collected via onsite.
Installation	Online, phone, and other mediums
Number of walk-throughs completed	Count of walk-throughs completed at each store site
Enrolled hard-to-reach customers in SoCalREN commercial programs	# of customers qualified as hard-to-reach % of savings in LILA communities % of savings in DAC communities
Program satisfaction survey results (via post- survey)	Analysis of satisfaction data collected from stores who have completed installation

Consistent with the ESJ Action Plan, and the overall goals of the Equity Segment, the SoCalREN's Food Desert Energy Efficiency Equity Program's planned objectives directly supports the following ESJ Action Plan 2.0 goals:

Table 3: ESJ Objectives

Objectives	ESJ Action Plan Goal	SoCalREN Core Value
Objective #1: Addressing the current challenges that exist within food deserts.	**Goal 2**: Increase investment in clean energy resources to benefit ESJ communities, especially to improve local air quality and public health.	Expand access to EE benefits
Objective #2: Installing energy efficiency measures that would reduce peak demand savings including the removal of old, inefficient refrigeration units that are costly to operate and maintain and require higher demands from the electricity grid than necessary.	**Goal 2**: Increase investment in clean energy resources to benefit ESJ communities, especially to improve local air quality and public health.	Expand access to EE benefits; Build energy capacity and economic resilience
Objective #3: Reducing GHG emissions, eliminating hydrofluorocarbons (HFCs) while simultaneously promoting options for healthy food options within LILA neighborhoods, DACs, and food deserts.	**Goal 4:** Increase climate resiliency in ESJ communities.	Deliver energy and climate impacts; Expand access to EE benefits
Objective #4: Providing education, outreach, and support to hard-to-reach small commercial businesses and food distribution centers regarding	**Goal 5:** Enhance outreach and public participation opportunities for ESJ communities to meaningfully participate in.	Build energy capacity and economic

3. Program Delivery and Customer Services

The target market for this program is hard-to-reach commercial customers that can offer fresh and healthy foods operating in SoCalREN territory. The program will identify customers that are hard-to-reach, further identified through Low Income Low Access (LILA) and Disadvantaged Communities (DAC) zip codes[4].

[4] Low Income Low Access (LILA) and Disadvantaged Communities (DAC)

Program Delivery Strategies & Tactics:

Outreach and business engagement strategy: The FDEEE will develop marketing and education materials that are grounded in authentic community engagement best practices. These materials will include electronic communications as well as hard-copy materials. Initial contact will be made by the SoCalREN Hard-to-Reach Business Energy Advisor through targeted outreach, including in-person store visits, direct mail, paid media, and coordination with community-based outreach organizations and local governments. Additionally, to maximize program potential, FDEEE will partner with organizations that share the program's mission of bringing healthy food options and smart energy practices to under-resourced communities.

Table 4: Marketing and Outreach Materials

Marketing Material Type	List of Outreach Materials

Informational materials	• In-language program participant materials
	  ○ Fact sheets
	  ○ Interest form/application
	  ○ Case studies
	  ▪ Web pages on SoCalREN.org

Educational materials	• In-language materials
	  ○ Healthy food education
	  ▪ Proper food storage and display opportunities
	  ○ Procurement options
	• Energy management education
	  ○ Proper management of equipment
	  ○ Actions to further reduce peak demand
	• Eligible DER programs
	• Highlighting additional saving opportunities

Community-facing educational materials	• Signs • Promoting healthy food and smart energy actions options post-installation

Store engagement strategy: The FDEEE will coordinate with the HTR BEA program to target eligible stores through a grassroots community-by-community approach, and onsite outreach to store owners. FDEEE will also utilize online marketing such as websites and social media, and e-blast outreach to engage potential stores. Working with outreach partners, including local government, SoCalREN Regional Partners, chambers of commerce, nonprofits supporting the distribution of food, etc. The FDEEE program will collaborate with trusted community-based organizations and actors to reach stores.

Enrollment and pre-installation site visit and refrigerator selection: Business Energy Advisors will enroll the customer for participation, and during that meeting will perform a pre-install site visit. Following confirmation that an eligible store is interested in the program, FDEEE will conduct an onsite site visit and walk-through to help determine what products and measures will work best for the store site. FDEEE will measure entrance openings and,

store space to make sure the equipment will fit, and review current equipment to help store owners select the units that make sense for their business. Additionally, FDEEE will help identify additional energy efficiency potential high-level measures.

Energy Advisors are trained to provide actionable advice on improving equipment performance based on in-field experience. Recommendations may include tasks like cleaning refrigeration unit coils or checking for frozen fan units. These observations are integrated into the audit and shared with the customer.

The program's equipment installation process will work with a partner vendor, the FDEEE will coordinate the installation of measures selected by the customer.

Project management support: The FDEEE program will provide customized project management support to participating stores through a direct install methodology. Project management support will be provided, in part, through SCR-COM-E4 and is designed to support the installation of refrigeration and energy efficiency measures in a way that reduces the opportunity costs associated with managing project installations.

Post-install visit: Upon completion of the installation, the program will conduct a post installation inspection as part of the quality control processes for the projects. Each customer will receive an inventory report that includes information and operational manuals about the newly installed equipment and energy-saving measures. This report and any additional supportive documents will help the business track and understand their improvements.
Additionally, the Energy Advisor will clearly communicate who to contact if any issues arise with the equipment. All equipment is covered under the manufacturer's warranty, and we will ensure that customers know how to reach out to the contractor directly for any warranty-related concerns, preventing confusion or misuse of the warranty process

Marketing support: The program will continue educating customers on energy-efficient upgrades and the benefits of offering healthy food even when the install is complete. The intention is to raise awareness within the community that these stores now carry healthy food options.

The FDEEE program will provide customized marketing support to participating stores to help promote the value, benefits, and availability of fresh and healthy food within their stores. Materials could include sandwich boards, decals, signage, and other materials as identified by the store owner as being effective for their target customer. Materials will include in-language messaging and other customized, community-specific information as appropriate.

4. Program Design and Best Practices

The FDEEE program overcomes several common barriers faced by small commercial businesses and the communities they serve. The table below outlines the market barriers and intervention strategies to overcome them.

Table 5: Market Barriers and Intervention Strategies

Barriers	Program Intervention Strategies Based on Best Practices and Lessons Learned
Limited energy efficiency offerings for HTR facilities and projects	The program exclusively serves HTR customers, with additional qualifiers for LILA and DAC communities, ensuring services reach those who need it most and have not previously had access.
Limited staff to implement energy efficiency and energy efficiency is deprioritized	The program provides a one stop shop through direct install delivery to expand access and increase the ability to implement energy efficiency.
Limited energy efficiency awareness	The program will create awareness by delivering outreach through a community and customer-focused approach, with the support from local governments, community-based organizations, and SoCalREN Regional Partners.
Limited funding for facility improvements	Measures offered at no-cost to program participants overcome customers lacking available funds.
Outreach materials not presented in the language spoken by the customer	The Program will create and use materials and resources in the language that is spoken by each customer.
Customer hesitation to participate in programs due to lack of trust	The programs will provide customers with a single direct point of contact, in-person communication, and applicable content that supports their needs. The Energy Advisor will be representative of the communities they are serving and understand the needs of each customer.

5. Innovation

The program will educate customers about the value of demand response (DR) enabled equipment where applicable and work with IOU DR programs to enroll customers in DR.

6. Pilots

The FDEE Program does not have any pilot elements, making this section not applicable.

7. Workforce Education and Training

The FDEEE Program is not a Workforce, Education and Training Program, making this section not applicable.

8. Workforce Standards

The Program will ensure that energy efficiency projects supported by the program adhere to workforce standards for heating, ventilation, and air conditioning (HVAC) and advanced lighting controls as applicable. The program will integrate compliance checks throughout the project lifecycle to ensure projects comply with CPUC workforce standards as stipulated in D.18-10-008. Workforce standards will be applied for the following measures:

a. HVAC Measures

i. Contractors installing measures with an incentive of $3,000 or more are required to be installed by workers or technicians who meet one of the following criteria:

1. Enrolled in and/or completed an accredited HVAC internship.
2. Completed more than five years of work experience at the Journey level per California Department of Industrial Relations definition, passed competency tests, and received specific credentialed training.
3. Has a C-20 HVAC contractor license issued by the California Contractors State License Board (CSLB)

b. Advanced Lighting Controls Measures

i. Installation of non-residential lighting control measures with an incentive of $2,000 are required to be installed by installation technicians who have completed an International Association of Lighting Management companies (NALMCO) Certified Lighting Controls Professional (CLCP) certification.

9. Disadvantaged Worker Plan

The FDEEE will coordinate with SoCalREN's Workforce, Education, and Training programs, present information on career opportunities for disadvantaged workers in the energy efficiency industry.

10. Market Access Programs

The FDEEE Program is not a market access program, making this section not applicable.

11. Additional information

No additional information.

Supporting Documents

1. Program Manual

The following describes the review of measure eligibility and customer eligibility for the Food Desert Energy Efficiency Equity Program. The Program is an equity energy efficiency program available to hard-to-reach commercial customers, designated Low Income Low Access (LILA) and located in Disadvantaged Communities (DAC) zip codes.

1. Eligible Measures

FDEEE focuses on a core set of deemed EE measures designed to deliver community benefits while being cost-effective. Measures focus on refrigeration.

- Water heating
- Refrigeration
- HVAC
- Lighting
- Food Service

Measures are provided at no cost to the participants. Measure level eligibility for any given project is a function of:

- **Total project TSB and TRC**: FDEEE reviews TSB and TRC to determine whether the full set of recommended measures facilitates budget goal achievement.
- **Feasibility:** FDEEE reviews the feasibility of given measures. If the project is not feasible due to existing conditions or because it is cost-prohibitive, the program considers removing the measure.
- **Compliance**: FDEEE reviews each potential measure for compliance with measure package and CPUC policies and rules.

All the measures listed and active in the eTRM that can be implemented through a downstream direct installation delivery type may be considered based on each participant's unique energy-saving facility opportunities.

2. Customer Eligibility Requirements

Customer eligibility requirements focus on the following factors: 100% of customers will qualify as hard-to-reach customers, further identified through Low Income Low Access (LILA) and Disadvantaged Communities (DAC) zip codes. These customers must be willing to offer fresh and healthy food.

- Receive services from SCE and/or SoCalGas
- In SoCalREN's regional territory
- Is Equity-qualified customers
- Has the authority to make operational decisions regarding the served facility

- Is willing to sign the participation agreement and accept SoCalREN terms and conditions
- Commitment to support permitting and granting facility access to all appropriate stakeholders: SoCalREN program staff, contractors, permitting officials, CPUC staff, and others as required
- Customers must be willing to offer fresh and healthy food

HTR Business Energy Advisors (BEAs) will collaborate closely with each participant during customer acquisition to ensure that program eligibility is reviewed, and that the customer is aware of program requirements.

3. Contractor Eligibility Requirements

Contractors must meet all workforce requirements previously discussed and be in good standing with the Contractors' License Board (CSLB). Contractors providing installation services work with the program provider and accept their data security, safety, insurance, bonding, and direct install practices.

4. Participating Contractors

The FDEEE Program is a downstream DI program, this section is not applicable.

5. Additional Services

The program will assist store owners in connecting with healthy food sources to establish a channel for stores to offer fresh food. In addition, the program will offer services that enhance safety, improve facility aesthetic features and increase safety.

SoCalREN HTR communities have been historically underserved and under-resourced. FDEEE is designed to prioritize equity and beneficial electrification through acknowledging that:

- SoCalREN FDEEE customers may not have previously had access to no-cost or low-cost, EE direct-install offerings; that are now sunset, such as linear LEDs, LED A and pin-based lamps, and T24-compliant controls.
- Electrification may increase the customer's electric energy bill, and EE upgrades offer a key opportunity to mitigate cost increases.
- Lighting controls and code compliance are often cost-prohibitive to hard-to-reach and rural businesses. Lighting upgrades may not be permitted, and controls may not be to code. FDEEE will support to-code controls to ensure that the business receives the benefit while mitigating any utility cost increase associated with electrification.

Additional but no longer available measures may be considered where they address a key equity concern and support beneficial cost-effective electrification where any utility cost increase is mitigated.

6. Audits

The FDEEE Program requires pre- and post-site surveys. The surveys confirm customer program eligibility and identify EE opportunities.

Pre-installation surveys across key building systems: Water Heating, Refrigeration, HVAC, and Lighting. They are designed to identify and appropriately document opportunities while facilitating project scoping, costing, program cost impacts, and the information needed to install the approved EE measures. BEAs and/or program staff perform the pre-installation survey.

Participating contractors conduct preconstruction (PreCon) site visits. These visits allow the contractors to review the scope and cost to ensure feasibility, collect additional permitting information, and assess potential safety concerns. The PreCon findings are shared with the program, and the program and the customer approve any alterations to scope or cost.

The program staff conducts post-installation reviews to ensure that each approved measure was installed and commissioned. In addition, post-installation reviews collect the necessary information to document the installation and confirm alignment to the measure package documentation requirements. Should the project not conform to program requirements or additional work be needed to complete the scope, the program issues a punch list to the installing contractor. In this case, post-installation inspections continue until all compliance and punch-list items are resolved.

7. Program Quality Assurance Provisions

Quality assurance and controls are internalized throughout the program design process.

Quality Assurance

- Customer acquisition: Pre-qualification checklists to ensure customer eligibility is confirmed
- Equity qualifications: Customer affidavit and Accelerated Replacement deemed measures Preponderance of Evidence affidavits are signed for hard-to-reach customers, and business locations are confirmed for DAC and Underserved status before services are provided.
- Customer project: Project checklists are used on every project.
- Key software solutions: Prospector, Direct Install, and Photo-Capture are used to guide implementers through the required data collection while geolocating all efforts
- Project review: Project and measure review and approval process checklists are generated to communicate assurance processes to team members.

Quality Control

- FDEEE managers review pre-qualification checklists to ensure eligibility before committing services
- Hard-to-reach status affidavits are reviewed for 100% of participants to confirm program eligibility.
- DAC and Underserved status is reviewed to confirm program eligibility, review of zip+4 codes.
- FDEEE program management and professional engineering staff review 100% of audits conducted by CEAs to ensure all program compliance documentation is collected.
- FDEEE compliance engineers review 100% of project packages to ensure measure package requirements are met.
- Software solutions are intended to collect required documentation, geolocate services, and warehouse information for ongoing availability for SoCalREN or independent evaluation.

Iterative Quality Assurance and Control

FDEEE takes an iterative approach to quality assurance and control tools and processes by using staff near-miss and incident reporting. Where a process or tool leads to a near-miss or incident where quality and/or compliance were not maintained, that occurrence is documented, discussed, and addressed in process and/or tool updates. Updates are then monitored to ensure that the deficiency in the process/tool was addressed.

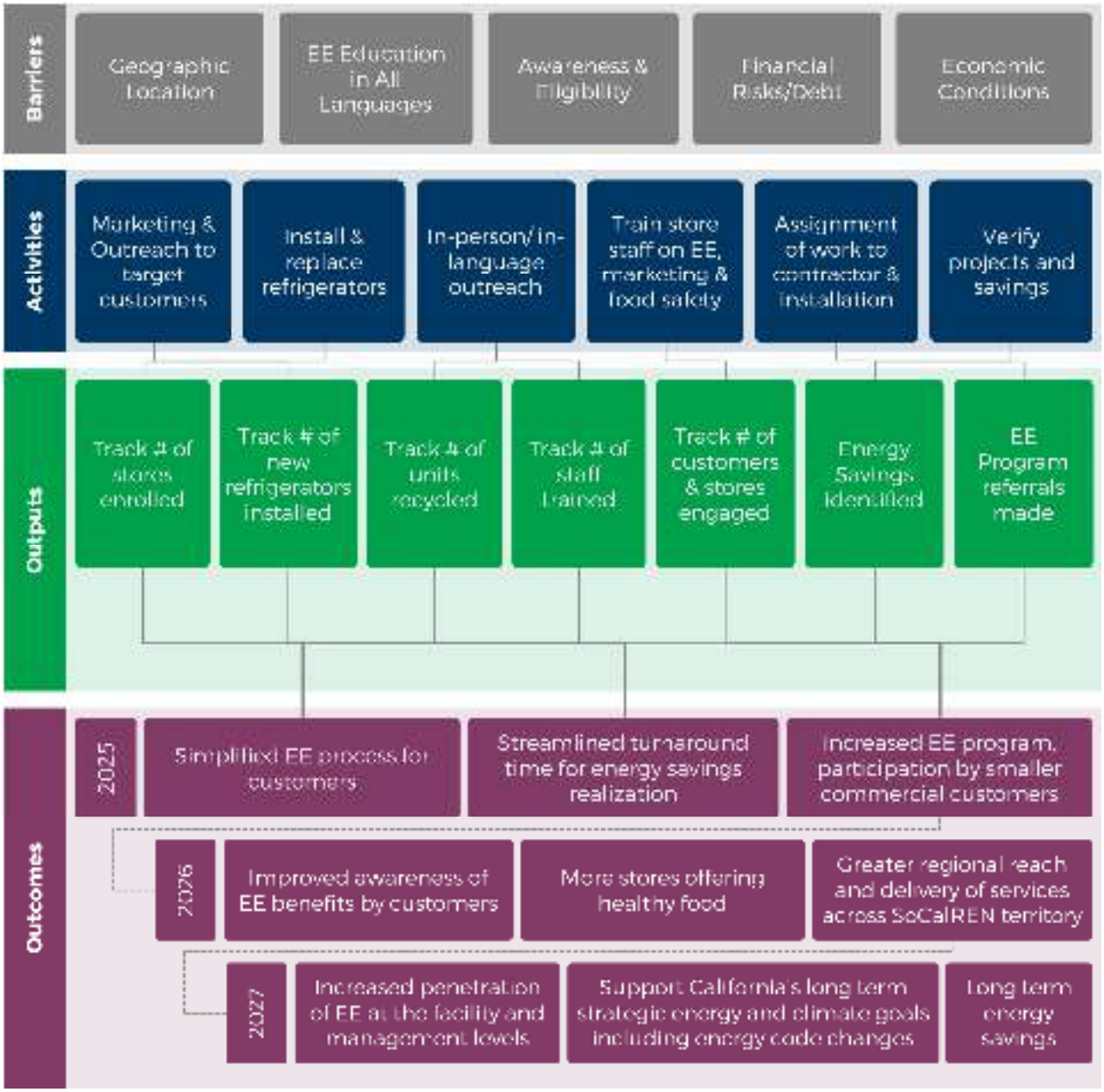
8. Program Metrics

- TSB: eTRM Measure Package permutations and CEDARs claims data
- First-year and lifetime energy and climate impacts: eTRM Measure Package permutations and CEDARs claims data
- TRC: CEDARs quarterly and annual claims data
- Number and Type of Sunset Measure Deployment: Implementing program reports from the direct install application
- Customer Utility Cost Impacts: 12-month utility cost data, energy savings estimates from eTRM permutations, and direct install application
- Electrification Measures: Number of units installed by building type as reported through claims data

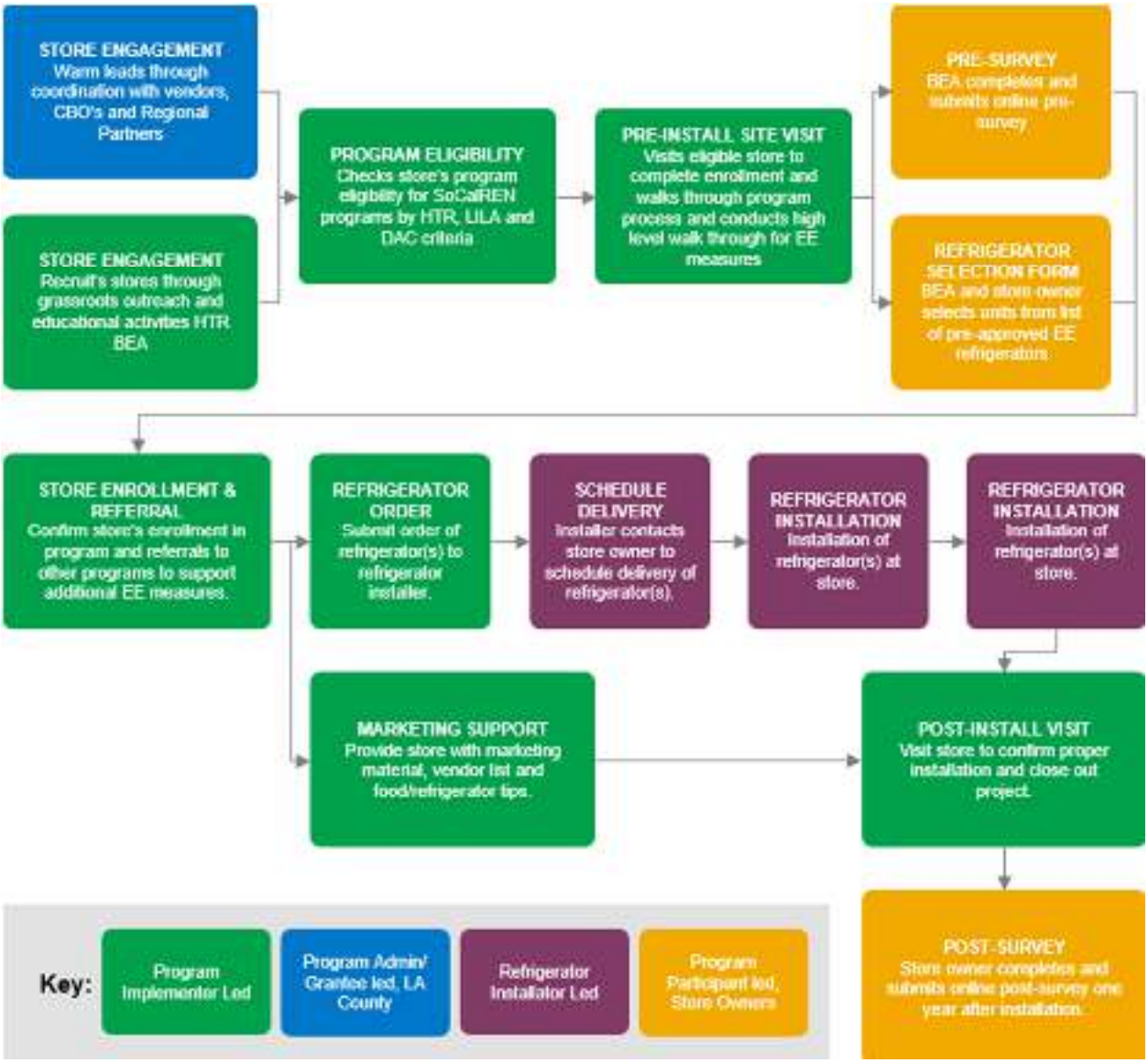
In addition, the following information will also be captured to support program metrics.

Metric	Method
Number of equity-targeted stores enrolled	Count of stores
Number of new energy-efficient refrigeration units installed and replaced	Count of refrigeration units installed and replaced
Number of equity-targeted store owners and/or employees that receive training	Count of store owners and/or employees engaged in training
Outside dollars leveraged to support customers	Amount of outside funding received by program participants
Number of equity-targeted customers engaged	Count of customers reached through outreach events and other educational or outreach activities
Number of stores surveyed pre/post refrigeration	Count of completed pre and post-surveys collected via onsite.
Installation	Online, phone, and other mediums
Number of walk-throughs completed	Count of walk-throughs completed at each store site
Enrolled hard-to-reach customers in SoCalREN commercial programs	# of customers qualified as hard-to-reach % of savings in LILA communities % of savings in DAC communities
Program satisfaction survey results (via post- survey)	Analysis of satisfaction data collected from stores who have completed installation

2. Program Theory and Program Logic Model



3. Program Process Flow Chart

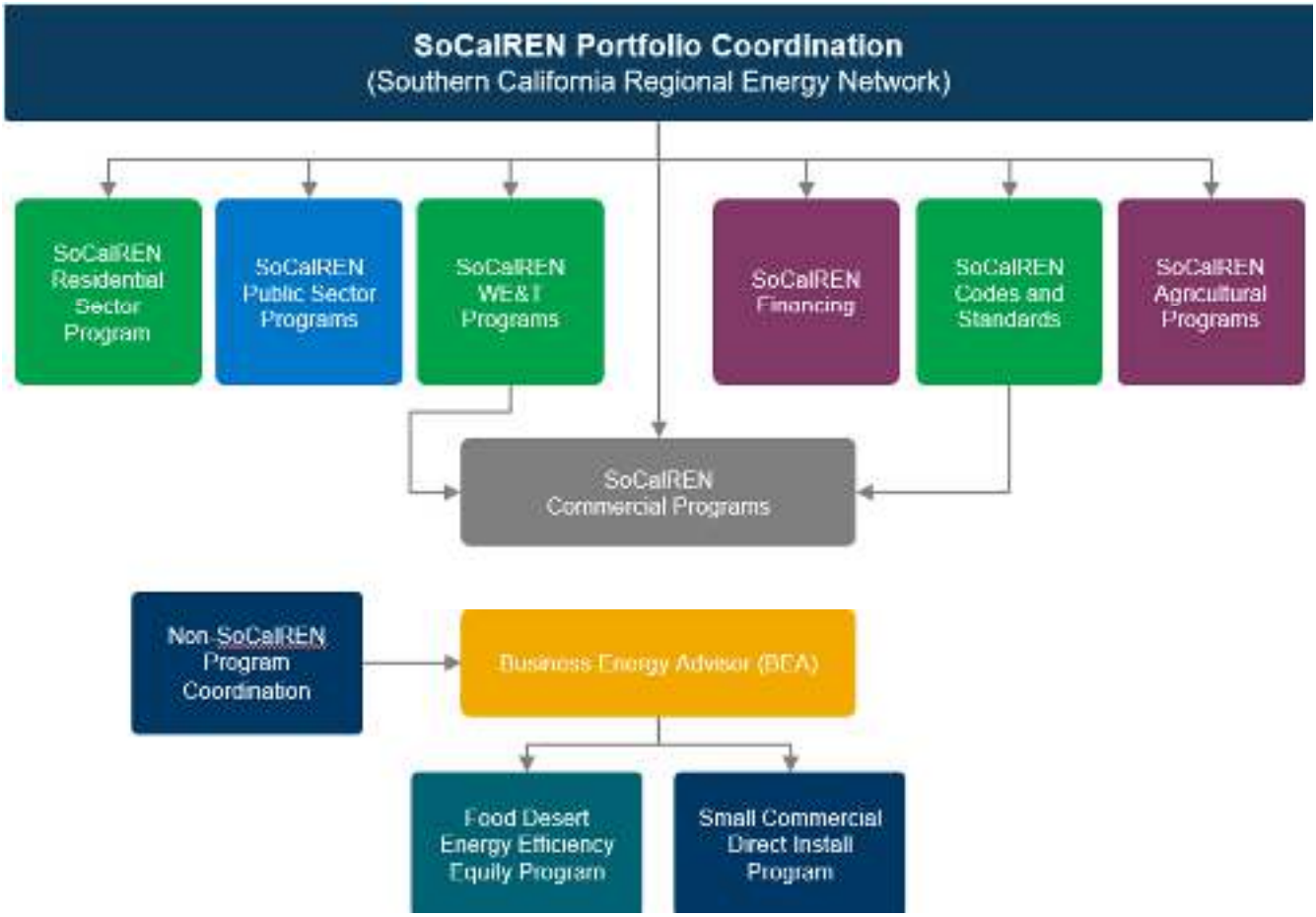


4. Incentive Tables for Measures, Measure Packages

Target End Use	Target Measures	Relevant Workpapers	Incentive
Lighting	Interior LED Lighting	SWLG091-01-draft	Full Measure Cost
	Exterior LED Lighting	SWLG031-01-draft	Full Measure Cost
	Tubular LED Lighting	SWLG061-01-draft	Full Measure Cost
	Lighting Controls (T24)	SCE13LG025.2	Full Measure Cost
Service and Domestive Hot Water	Faucet Aerator	SWWH019-05	Full Measure Cost
	Hot Water Pipe insulation	SWWH017-05	Full Measure Cost
	Tankless Water Heater	SWWH006-07	Full Measure Cost
	Recirculation Pump Timer	SWWH021-01	Full Measure Cost
Service and Domestive Hot Water (Electrification)	Heat Pump Water Heater (replacing storage NG or tankless)	SWWH027-04	Full Measure Cost
	Large Heat Pump Water Heater (replacing large storage NG or instantaneous WH)	SWWH028-04	Full Measure Cost
Commercial Refrigeration	Glass Door, Reach-in Refrigerator/Freezer	SWCR018-04	Full Measure Cost
	Medium or Low-Temperature Display Case With Doors	SWCR021-03	Full Measure Cost
	Fluorescent to LED Retrofits in Reach-in Display Cases	SCE13LG098.4	Full Measure Cost
	Anti-Sweat Heater Controls	SWCR001-04	Full Measure Cost
	Auto Closer for Refrigerated Storage Door	SWCR005-03	Full Measure Cost
	ECM Retrofit for a Walk-in Cooler or Freezer	SWCR004-02	Full Measure Cost
Food Service	Efficient Commercial Convection Oven, full/half	SWFS001-03	Full Measure Cost
	Efficient Commercial Fryer	SWFS011-06	Full Measure Cost
	Low-Flow Pre-Rinse Spray Valve	SWFS013-03	Full Measure Cost

Target End Use	Target Measures	Relevant Workpapers	Incentive
Food Service Electrification	Efficient Commercial Convection Oven, full/half (gas to electric)	SWFS022-03	Full Measure Cost
	Efficient Commercial Fryer (gas to electric)	SWFS021-04	Full Measure Cost
HVAC	Smart Thermostat	SWHC039-08	Full Measure Cost
	VSD for HVAC Fan Controls	SWHC018-04	Full Measure Cost
Appliance of Plug Load	Vending and Beverage Merchandise Controller	SWAP011-04	Full Measure Cost
Building Envelope	Reflective Window Film	SCE13HC002.2	Full Measure Cost

5. Program Links



6. Program Measurement & Verification (M&V)

Program level measurement and verification (M&V) activities will be conducted throughout the program cycle to inform program improvements and future program design. The DI implementation process involves the following steps to ensure program services and data points are tracked and quality is controlled:

1. Data Collection Strategies

The Program uses the following data collection through data management in a secure project customer relationship management (CRM) platform that tracks customer information, baseline condition equipment details, measures installed including geotagged photographs, copies of invoices, number and cost of units, incentives applied, and dates of installation. This centralized data hub allows for detailed reports and dashboards to track progress towards program goals and key performance indicators.

Embedded within the project process is quality control checks: all project deliverables and project application/customer agreement materials are put through rigorous internal quality control checks prior to being delivered to clients or the CPUC. Including a post-installation inspection.

2. Performance Metric Reporting

Timeline	Action	Key Performance Indicators
Monthly	Review program progress, discuss emerging barriers, and deploy optimizations. Key performance indicators include:	• TSB in progress, installed and claimed as a percentage of annual goals • Program expenditures to budget as a percentage of year and TSB goal
Quarterly	Review TRC ratio trends no less than quarterly and deploy optimizations as needed to trend to TSB goal with an acceptable TRC ratio	• Progress in meeting or exceeding TRC target • Customer project pipeline is sufficient to meet annual TSB goal
	Review project documentation for completeness	• 100% of measure package documentation is available for review • 100% of necessary additional information for reporting and claims has been collected
	Review all incentive disbursements	• 100% of incentive disbursements can be tracked to customers
Annual		• Claims to forecast TSB • Claims to forecast TRC ratio • In-community Clean Energy Advisor placement % with disadvantaged worker information collected, tracked and reported

3. **Independent Evaluations**
   SoCalREN collects the necessary data to support future independent evaluation and ensures that the requested data is provided promptly.

7. Normalized Metered Energy Consumption (NMEC) Program M&V Plan

Not applicable

8. Multi-DER IDSM Pilots

Not applicable

9. SEM Programs Only

Not applicable