Southern California Regional Energy Network

Energy Efficiency Project Delivery (EE PDP) Program Implementation Plan

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Program Overview

The Southern California Regional Energy Network (SoCalREN) Energy Efficiency Project Delivery Program (PDP) fills market gaps and provides public agencies with an integrated, objective, and comprehensive energy efficiency offering, empowering them to become proactive stewards and leaders in energy action. Program services include, but are not limited to, energy planning, energy use analysis, investment-grade audits, design performance specifications, scope of work support, incentive and financing application support, financial analysis, procurement assistance, bid analysis, and construction management support. In addition, public agencies receive project management services through a dedicated Project Manager, who acts as a single point of contact to guide them through the entire project implementation process. The dedicated Project Manager also supports public agencies in navigating and gaining access to SoCalREN's applicable resource and non-resource programs alike, as well as Investor-Owned Utility (IOU) and third-party programs, unlocking and streamlining project implementation to realize a resilient, reliable, and clean energy future.

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 Public Agency Energy Efficiency Project Delivery Program (EE PDP)			
2	Program ID number	SCR-PUBL-B1			
3	Program Implementer	Third-Party (ICF and Willdan)			
4	Portfolio Administrator	County of Los Angeles/SoCalREN			
5	Program Implementer Type	Third-Party Solicited (REN)			
6	Portfolio Segment	Market Support			
7	Total Program Budget 2024–2027	$38,076,290			
8	Program Budget by Year	**2024**	**2025**	**2026**	**2027**
		$7,695,000	$8,056,000	$11,305,000	$11,020,290
9	Program Duration	2012–Current			
10	Total System Benefit (TSB)	**N/A (Non-resource)**			
11	CO2	**N/A (Non-resource)**			
	Lifecycle Gross	N/A			
	First-Year Gross				
	First-Year Net				
12	KW	**N/A (Non-resource)**			
	First-Year Gross	N/A			
	First-Year Net				
13	kWh	**N/A (Non-resource)**			
	Lifecycle Gross	N/A			

	First-Year Gross	
	First-Year Net	
14	Therms	**N/A (Non-resource)**
	Lifecycle Gross	N/A
	First-Year Gross	
	First-Year Net	
15	Pgm. Cost Effectiveness TRC	**N/A (Non-resource)**
	TRC by Year	N/A
16	Pgm. Cost Effectiveness PAC	**N/A (Non-resource)**
	PAC by Year	N/A
17	Market Sector	Public Sector
18	Program Type	Non-Resource
19	Delivery Type	Downstream
20	Intervention Strategies	Technical Assistance, Audit, Marketing and Outreach
21	M&V Methods	Other—EM&V

Implementation Plan Narrative

1. Program Description

SoCalREN's PDP offers services to identify and complete Public Sector projects that are customized to meet the unique needs of each enrolled agency. The goal of the PDP is to identify and implement cost-effective energy efficiency projects that yield electricity and gas savings for local governments and communities across the region.

To achieve this goal, the PDP aims to accomplish the following objectives:

1. Fill market gaps in the Public Sector and provide public agencies with integrated, objective, and comprehensive EE solutions for their facilities and non-facility infrastructure;
2. Increase the percentage of public agencies that engage their communities in energy actions, as well as EE strategies, thereby reducing overall community energy consumption;
3. Increase the capacity of public agencies to meet local, regional, and state energy targets and policy goals;
4. Expand the participation of public agencies in the PDP across the entire regional territory;
5. Position public agencies and strategic Regional Partners to lead community awareness campaigns, stakeholder engagement activities, build public awareness of local, regional, and state efforts, develop energy action plans with shovel ready project scopes, and drive participation in Program Administrator resource programs; and
6. Expand the implementation of cost-effective EE projects.

The PDP offers energy efficiency services to over 1,000 eligible public agencies (e.g., cities, counties, tribes, school districts, community colleges, universities, water districts, sanitation districts, state and federal agencies, and other special districts) within the Southern California Edison (SCE) and Southern California Gas (SCG) service territories, helping agencies reduce energy and maintenance costs at public sites and facilities. It is delivered through a third-party implementer responsible for securing and coordinating all program resources and services to meet the program's objectives and targets. The implementer works closely with Investor-Owned Utilities (IOUs) and other stakeholders to engage public agencies and channel savings to resource programs, driving cost-effective energy solutions.

At no cost to agencies, the PDP identifies energy saving measures and works closely with public agency staff throughout the project lifecycle—from performance specification to construction completion—to implement energy efficiency strategies with a focus on underserved and hard-to-reach customers.[1]

[1] 2As defined by CPUC Code Section 1601(e), CPUC Decision 23-06-005, and SoCalREN criteria for underserved communities.

2. Performance Tracking

Program Performance Metrics

PDP reports on the key performance metrics listed in Table 2 below, both annually and periodically throughout the program cycle. In addition, SoCalREN also reports annually on Common Metrics as directed by the CPUC.

Table 2. Program Performance Metrics

Metric	Method	Frequency
Projects Channeled by Resource Program	Number of projects channeled by resource program	Annually
Active and Completed Projects	Number of active and completed projects	Annually
Lifetime Bill Savings	Lifetime bill savings associated with supported projects	Annually
Projects Receiving Project Management Support	Percent of projects receiving project management support	Annually
Projects Receiving Energy Audit or Savings Analysis Services	Percent of projects receiving energy audit or savings analysis services	Annually
Projects Receiving Incentive or Financing Application Assistance	Percent of projects receiving incentive or financing application assistance	Annually
Projects Receiving Procurement or Construction Phase Support	Percent of projects receiving procurement or construction phase support	Annually
Agency Enrollments	Number of new public agency enrollments	Annually
Projects Delivered to Underserved Agencies	Percent of projects delivered to underserved agency sites	Annually
Outreach Activities Completed	Number of outreach activities completed	Annually
Educational Materials Delivered	Number of unique educational materials delivered	Annually
Customer Satisfaction	Enrolled agency satisfaction rating	Annually

Program indicators are as follows:

- Number of active and completed projects
- Lifetime bill savings

Quantitative Program Targets

Table 3. Quantitative Program Targets

Program Area	Metric	2026 Target	2027 Target
Project Delivery	Projects Channeled by Resource Program	Indicator	Indicator
Project Delivery	Active and Completed Projects	Indicator	Indicator
Customer Value	Lifetime Bill Savings	Indicator	Indicator
Project Support	Projects Receiving Project Management Support	100%	100%
Project Support	Projects Receiving Energy Audit or Savings Analysis Services	90%	90%
Project Support	Projects Receiving Incentive or Financing Application Assistance	80%	90%
Project Support	Projects Receiving Procurement or Construction Phase Support	50%	50%
Program Growth	Agency Enrollments	13	14
Capacity and Expertise	Outreach Activities Completed	11	11
Capacity and Expertise	Educational Materials Delivered	32	33
Equity	Projects delivered to underserved agency sites	50%	50%
Customer Satisfaction	Customer satisfaction rating	80%	80%

3. Program Delivery and Customer Services

SoCalREN's PDP delivers savings by providing public agencies with comprehensive and customized project management and technical engineering services through a third-party implementer, facilitating the delivery of cost-effective and streamlined energy efficiency projects. The PDP aligns with resource program downstream intervention strategies and actively works to ensure that other Program Administrator offerings, such as upstream, midstream, direct install, and third-party programs, are leveraged when feasible. After enrollment into the program, each agency is assigned a dedicated project

delivery team composed of project management staff and an engineering firm. Throughout project identification and implementation, the project delivery team works with the agency to address challenges and proactively identify solutions.

The PDP utilizes a multi-phase project delivery process to guide agency projects from planning and identification to execution and completion. Each phase consists of sub-tasks to ensure that industry best practices, agency alignment, utility and third-party program coordination, and cost-effective solutions are implemented throughout the project life cycle. The following is a high-level overview of the program delivery process and customer services deployed by the PDP.

Enrollment and Project Identification: An agency is considered enrolled once it signs a non-binding enrollment form that acknowledges PDP participation, responsibilities, and services. The enrollment process begins with an initial engagement presentation that introduces SoCalREN Public Agency Programs, in coordination with Regional Partners and other relevant program partners. The enrollment form is presented to the agency during this meeting, and program services are not provided until the form is signed and returned. Enrollment in the PDP also gives Public Agencies access to other available SoCalREN Public Agency Programs. Once enrolled, a PDP Project Manager is assigned to the agency to begin the project development process.

After enrollment, an agency-wide energy analysis is prepared for the agency. The analysis provides a portfolio-wide snapshot of energy consumption and cost by sector (i.e. water and wastewater pumping, street lighting, facilities, and outdoor lighting) 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.

Audit: Once a project is identified, the agency is asked to sign a project commitment form that outlines program services and formalizes the agency's commitment to pursue a viable project before the investment of limited program resources. The PDP Project Manager then works with the designated engineer to conduct a detailed facility or site visit and identify a preliminary list of recommended energy efficiency measures to present to the agency. After the agency selects which energy efficiency measures to implement, the engineer and PDP staff work together to prepare audit calculations and a project proposal that recommends operational and maintenance improvements and/or upgrades to equipment and controls. The proposal outlines the business case for implementing the recommended energy measures by providing estimated project costs, energy bill savings, available incentives, and financing solutions for the package of measures. The PDP team then prepares and submits an incentive application package to reserve incentives and financing opportunities available to the agency if applicable.

When possible, the audit phase is completed in coordination with applicable program partners (i.e., Regional Partners and third-party programs). Coordination among partners ensures that a robust array of service offerings are provided to the agency, while also improving cost-effectiveness across programs and avoiding duplication of efforts. Other SoCalREN Public Program offerings are also integrated during this phase if applicable.

Design and Procurement: The assigned engineer completes technical performance specifications for the selected measures. If the agency releases a bid for project construction services, the PDP can provide procurement support in the form of supplementary bid package materials and sample language as required. If the agency is using the PDP's simplified procurement method, a joint scope walk is scheduled

at the site with the selected pre-qualified contractor, agency representative, and 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 agency.

Agency Approval: The PDP Project Manager prepares a detailed project proposal package to assist agency staff with obtaining the necessary documentation and 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 agency's relevant elected approval authority approves the project, submits the necessary signed documentation, and issues a purchase order to the contractor for construction services.

Construction: During the construction phase, the agency is the "project owner of record" responsible for all construction contracts and costs, as well as designating a construction manager. The 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.

Completion: Once the project is installed and verified, the PDP team will work with the agency and contractor to collect the necessary information to submit the appropriate project close-out information to the applicable resource program, allowing the agency to receive incentives and the savings to be accrued for the project. The contractor is responsible for transferring all appropriate documentation, knowledge, and training to the agency and the facility management personnel for new installed equipment and/or operational changes. After project completion, the agency receives a survey to provide feedback on the impact of the program services utilized to complete the energy efficiency project and on how the program can improve.

Capacity Building: Beyond project development services, enrolled agencies can access expertise, resources, shared procurement strategies, best practices, and lessons learned to leverage the collective knowledge and expertise of the SoCalREN to help reduce costs and address common barriers. The 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.

4. Program Design and Best Practices

Market Barriers

The fragmented way in which the energy industry currently delivers services and incentives makes it challenging to achieve deep energy retrofits. This creates multiple barriers to whole-building retrofits and a "project delivery gap" for the customer. A key barrier for public agencies is understanding the benefits of implementing energy projects on a comprehensive scale. Further, agencies often lack sufficient in-house expertise and necessary financial resources. These are important challenges to address because public agencies are significant players in the energy field, both as consumers and as leaders of their communities. The PDP tackles 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 public agencies to meet key challenges, the EE PDP has identified several best practices that are integrated into the project delivery process to ensure continued success. The EE PDP addresses the unique needs of the public agency and mitigates the need for agencies to acquire their own in-house expertise and resources. Through a "one stop" approach, the EE PDP delivers comprehensive energy retrofit services, customizable to the agency's needs. Participating public agencies can take advantage of the full suite of offerings or select only the services that fit their needs.

The PDP aims for continuous improvement of implementation practices and systems to further improve and enhance the services received by public agencies. Since the 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. 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 agency buy-in more frequently as a project progresses and to ensure that PDP resources are carefully managed and delivered

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

Regional Partner Agency Engagement: The Regional Partner strategy was initiated to mitigate gaps created by SCE's closing of Local Government Partnership (LGP) programs and to leverage local experts to better serve diverse communities across SoCalREN's expansive territory. In 2019, SoCalREN 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 the regional partner organizations have established relationships with agencies working on energy efficiency efforts through LGPs. Through these Regional Partners, agencies across diverse climate zones, population sizes, population densities, and other demographic characteristics are targeted for engagement to ensure comprehensive service to all eligible SoCalREN agencies.

Regional Partner Strategy Goals:

- Demonstrate regional reach and delivery of valuable services to the entire service territory while boosting the impact of energy efficiency through increased enrollments and enhanced engagement;
- Increase the number of energy projects in SoCalREN's territory and their associated savings;
- Understand and seek ways to deliver and enhance services in subregions; and
- Identify new opportunities, sub-programs, and strategies to meet specific sub-regional needs.

Regional Partners enhance SoCalREN's expertise and reach by leveraging their local knowledge, existing relationships with member agencies, and professional connections that often extend beyond energy efficiency.

Utility Coordination and Stakeholder Collaboration: The PDP promotes early and ongoing cooperation and collaboration with utility partners, third-party program implementers, and stakeholders based on an agreed upon protocol. Coordination among these partners ensures that a robust array of service offerings are provided to the agency, 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 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 throughout 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. The 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 PDP team helps identify and secure grant funding and project financing. The PDP assists agencies in accessing and applying 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, local self-funded financing opportunities, and the SoCalREN's Revolving Loan Fund (RLF). Enrolled agencies also have access to a SoCalREN financial advisor through PDP for additional expertise on an as-needed basis.

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

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

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

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

Customer Satisfaction: PDP continues to monitor customer feedback to identify program enhancements and ensure the highest level of customer satisfaction is achieved. Since the PDP's inception, annual customer satisfaction ratings have consistently been 80% or higher.

Peer-to-Peer Learning: EE PDP seeks to build agency capacity and expertise in energy efficiency opportunities by providing agencies with customized tools and resources they would otherwise have to develop on their own, thereby saving time, money, and staff resources. PDP also shares strategies and best practices used by its agencies to overcome common barriers with other enrolled agencies through webinars, conferences, and workshops.

5. Innovation

SoCalREN aims to maximize savings opportunities while reducing implementation costs. Innovative program elements include start-to-finish customized energy efficiency project management support, streamlined data analytics, key partnerships, and continuous improvement procedures.

Start-to-finish Project Management Service Delivery: Public agencies face unique barriers across all stages of an energy efficiency project's lifecycle. SoCalREN offers comprehensive, start-to-finish customized project management support to overcome common barriers at every project phase. Additionally, SoCalREN seamlessly integrates and coordinates all available and applicable energy efficiency programs and services to avoid duplication and customer confusion. This integrated approach reduces customer touchpoints and enables public agencies to complete deeper and more comprehensive energy efficiency projects than would otherwise be feasible.

Streamlined Data Analytics: PDP leverages various energy analysis tools to compare agency-owned assets, such as buildings and water treatment plants, to identify energy intensive infrastructure with opportunities for cost-saving energy efficiency projects. SoCalREN's Comparative Energy Analysis report synthesizes energy usage data to increase public agency awareness of their facility energy usage and to also identify potential projects. Additionally, ENERGY STAR Portfolio Manager® (ESPM) is used for benchmarking and additional analyses.

Partner with Other Program Administrators and Third Parties: SoCalREN will partner and coordinate with Program Administrators and third-party programs operating locally to coordinate program services that provide additional value to participating public agencies. These may include Regional Energy Networks (RENs), Community Choice Aggregators (CCAs), Investor-Owned Utilities (IOUs), and Municipally-Owned Utilities (MOUs).

Continuous Improvement Procedures: SoCalREN will employ a continuous improvement approach to all aspects of program implementation. This approach will include evaluation and the development of program strategies to control costs and ensure that the most efficient methods are deployed for implementing projects. The regular evaluation of feedback and lessons learned from program staff, subconsultants (including Regional Partners), agency participants, and stakeholders will also ensure that SoCalREN is operating as cost effectively as possible.

6. Pilots

This section is currently not applicable.

7. Workforce Standards[2]

The PDP does not directly provide the installation of energy efficiency equipment. Nonetheless, the program will provide due diligence to ensure that energy efficiency projects supported by the program adhere to the Workforce Standards for Heating, Ventilation, and Air Conditioning (HVAC) and Advanced Lighting Control Programs, as applicable. The program will integrate messaging and direction to public agencies during the project lifecycle to ensure projects installed comply with CPUC Workforce Standards as stipulated in D.18-10-008. These standards will be referenced and reiterated during the delivery of various program services including the following touchpoints:

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

- Project Proposal will highlight the importance and purpose of the standards.
- Technical specifications will include language that program participants will reference prior to project installation.
- Procurement Kickoff meeting will include an agenda item to highlight the significance of the standards and requirements for agencies to submit applicable documentation and confirm adherence to the guidelines at project closeout.

To demonstrate due diligence, PDP may request program participants share applicable documentation to demonstrate adherence to the Workforce Standards which may include any certifications, apprenticeship programs, accredited degrees, or other workforce training programs.

8. Disadvantaged Worker Plan[3]

PDP coordinates with SoCalREN's Workforce, Education, and Training programs to present information on career opportunities for disadvantaged workers in the energy efficiency industry.

9. Additional Information

This section is not applicable.

[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 Program Manual.

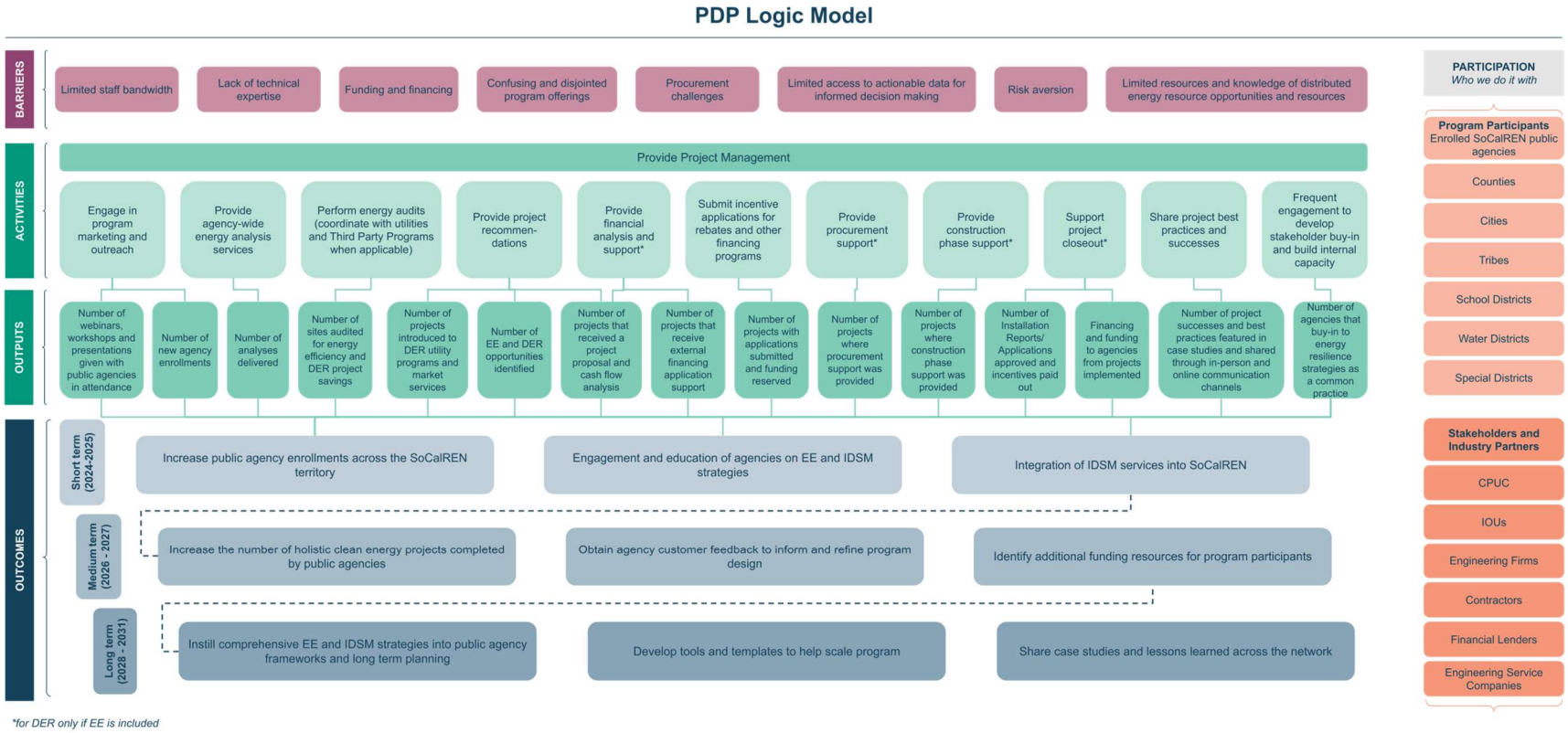
Table 4. Program Manual Required Information Summary

#	Information Required	Short Description
1	**Eligible Measures or Measure Eligibility**	Energy efficiency measures identified through EE PDP are channeled through existing energy efficiency resource programs and must meet the applicable Program Administrator's measure and incentive eligibility requirements.
2	**Customer Eligibility Requirements**	EE PDP serves public agencies within the SCE and/or SoCalGas service territories. Eligible agencies include cities, counties, tribes, school districts, community colleges, universities, water districts, sanitation districts, state and federal agencies, and other special districts.
3	**Contractor Eligibility Requirements**	Agencies may use contractors selected through their own procurement processes or access pre-qualified specialty contractors through EE PDP's simplified procurement pathway. Contractors must meet applicable resource-program and CPUC workforce requirements.
4	**Participating Contractors, Manufacturers, Retailers, Distributors**	EE PDP coordinates with agency-selected or pre-qualified contractors, engineering firms, utilities, Regional Partners, resource programs, and third-party implementers. The program does not identify specific participating manufacturers, retailers, or distributors.
5	**Additional Services**	EE PDP provides no-cost energy planning, energy-use analysis, project management, engineering, financial analysis, incentive and financing application support, procurement assistance, bid analysis, construction support, and capacity-building resources.
6	**Audits**	After project identification and agency commitment, EE PDP conducts a detailed facility audit or site visit and develops audit calculations and a project proposal documenting recommended measures, estimated costs, bill savings, incentives, and financing opportunities.
7	**Program Quality Assurance Provisions**	EE PDP uses standardized tools and templates, internal deliverable reviews, construction-phase verification, secure project-data tracking, quarterly performance reviews, and customer feedback to support data quality and consistent project delivery.

#	Information Required	Short Description
8	**Other Program Metrics**	EE PDP tracks savings channeled to resource programs, greenhouse gas reductions, agency enrollments, projects delivered to underserved agencies, outreach and educational activities, customer satisfaction, agencies receiving support services, benchmarking assistance, and new construction jobs.

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

Figure 1. EE PDP Program Theory and Logic Model

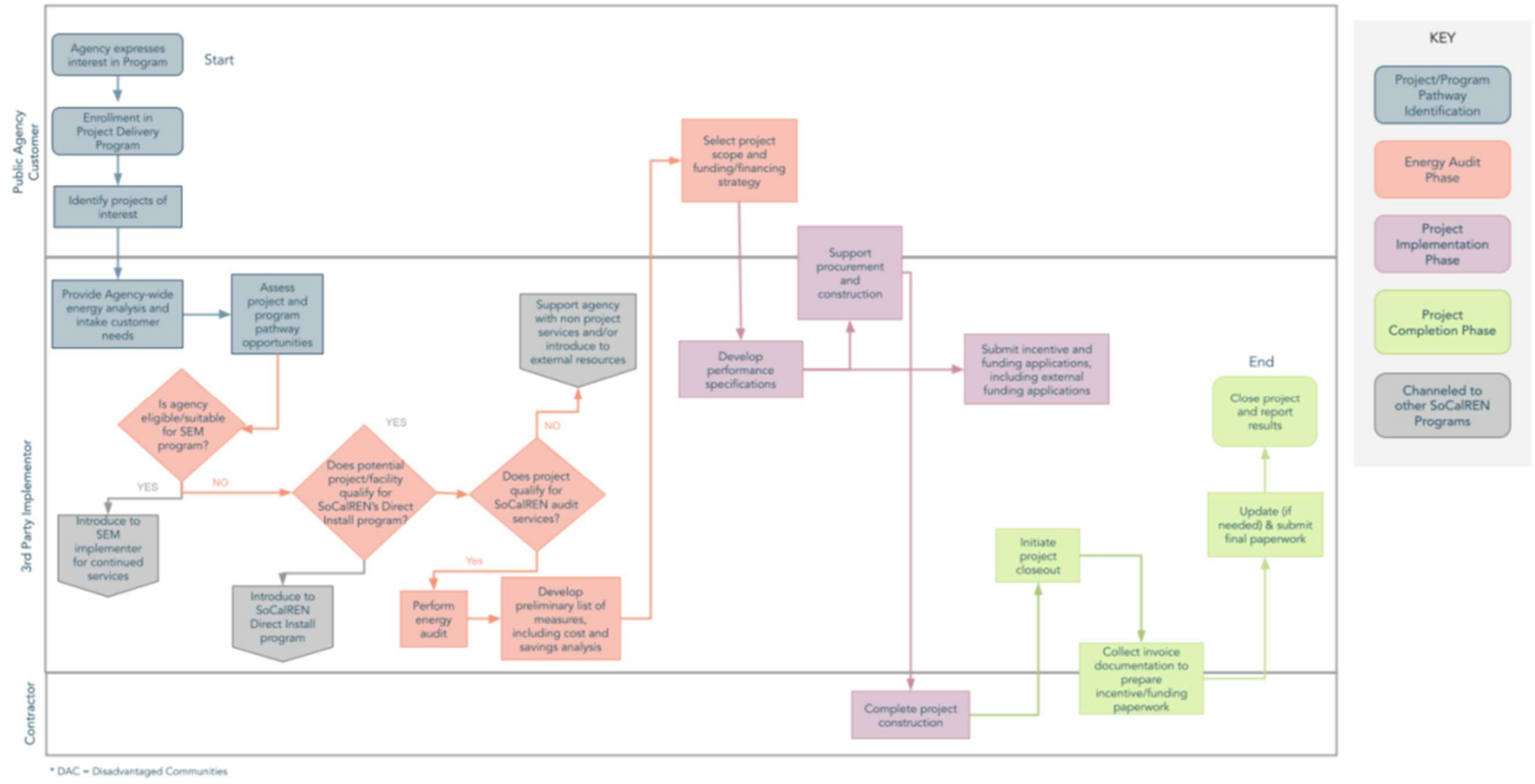


4 The expected causal relationships between program goals and program activities in a way that allows the reader to understand why the proposed program activities are expected to result in the accomplishment of the program goals. A well-developed program theory can (and should) also describe the barriers 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. EE PDP Process Flow Chart



4. Measures and Incentives

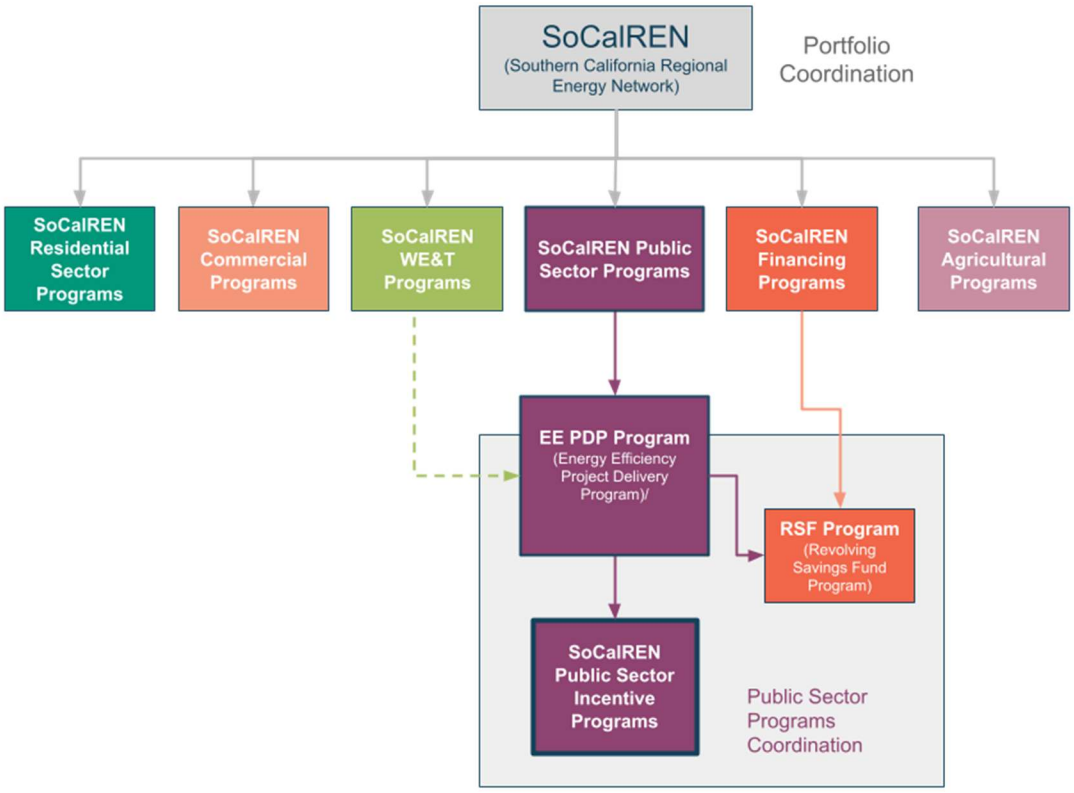
All EE measures funnel through existing EE resource programs. The table below describes other tools leveraged to support turnkey project delivery services.

Table 5. Program Tools

#	Tool	Short Description
1	ENERGY STAR® Portfolio Manager	Online tool used to track energy consumption and greenhouse gas emissions (GHG). Allows user to benchmark the performance of one building or a whole portfolio of buildings.
2	GIS	Geographic Information System (GIS) tool allows users to pinpoint exact locations of facilities and tie usage characteristics to those facilities.
3	ezIQC	Provides access to competitively awarded contractors through cooperative purchasing networks, expediting project delivery through a simplified procurement process.

5. Diagram of Program

Figure 3. Diagram of Program



6. Program Measurement and Verification (M&V)

SoCalREN's EM&V team will conduct program-level EM&V activities throughout the program cycle to inform program improvements and future program design. The PDP program will take the following steps to ensure services and data are tracked and quality-controlled, so data can be readily accessed for EM&V studies:

1. **Data Management in Secure SoCalREN Customer Relationship Management (CRM) Platform:** agency and project data, along with milestones, are tracked in a centralized cloud-based platform. This centralized data hub allows for the development of detailed reports and dashboards to monitor progress towards program goals and key performance indicators.
2. **Deliverable Quality Control Checks:** all project deliverables and project application/customer agreement materials undergo rigorous internal quality control checks before being delivered to clients or the CPUC.
3. **Quarterly Review of Progress Toward Key Performance Indicators:** using the data stored in the SoCalREN CRM platform, the program will evaluate progress toward key performance indicators (KPIs) and identify areas for improvement at least quarterly.
4. **Project Closeout Surveys and Customer Feedback Solicitation:** customer feedback is collected via a survey upon completion of every project. The survey solicits feedback on the services utilized, the standard of customer service, and recommendations for program improvements. Further, the SoCalREN Public Agency Programs conduct annual customer surveys to collect portfolio-level feedback. This allows for iterative program enhancements to the suite of SoCalREN Public Agency Programs.

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

Program Manual

1. Program Overview

The SoCalREN Energy Efficiency Project Delivery Program provides public agencies with integrated, objective, and comprehensive support to identify and implement cost-effective energy efficiency projects. The program helps agencies address limited staff capacity, technical expertise, funding constraints, procurement requirements, and fragmented program offerings.

Each enrolled agency is assigned a dedicated Project Manager and engineering team to provide no-cost support throughout the project lifecycle. Services extend from energy planning and project identification through audits, design, procurement, agency approval, construction, project verification, and closeout.

2. Eligible Measures

EE PDP identifies energy efficiency measures and helps agencies develop projects, but does not directly provide incentives or claim project savings. Eligible measures are channeled through existing energy efficiency resource programs and must meet the applicable Program Administrator's measure, incentive, and documentation requirements.

Potential measures are identified through agency-wide energy analyses and detailed facility audits. Recommended projects may include operational and maintenance improvements and upgrades to equipment and controls. The specific measures included in each project are based on the participating agency's facilities, energy use, project goals, and available resource-program opportunities.

3. Customer Eligibility Requirements

EE PDP serves eligible public agencies within the SCE and SoCalGas service territories, including:

- Cities and counties
- Tribes
- School districts, community colleges, and universities
- Water and sanitation districts
- State and federal agencies
- Other special districts

An agency is considered enrolled after signing a non-binding enrollment form acknowledging program participation, responsibilities, and available services. Program services begin after the form has been signed and returned. EE PDP serves public agencies throughout the eligible territory, with focused support for underserved and hard-to-reach customers.

4. Contractor Eligibility Requirements

Public agencies may select contractors through their own procurement processes or access pre-qualified specialty contractors through EE PDP's simplified procurement pathway. Contractors must meet the requirements of the applicable resource program and any CPUC workforce standards that apply to the proposed measures.

For projects using simplified procurement, the selected contractor participates in a joint site walk with the agency and EE PDP project team. The contractor reviews the draft technical specifications and provides feedback before the specifications and cost proposal are finalized.

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

EE PDP coordinates with agency-selected or pre-qualified contractors, engineering firms, financial advisors, utilities, Regional Partners, Program Administrators, and third-party programs to support project development and implementation. Coordination helps agencies access a comprehensive set of services while reducing duplication and confusion among available programs.

Potential partners include Regional Energy Networks, Community Choice Aggregators, Investor-Owned Utilities, Municipally-Owned Utilities, and other programs operating within the region. The program does not identify specific participating manufacturers, retailers, or distributors.

6. Additional Services

Participating agencies receive customized services based on their project needs, including:

- Energy planning, energy-use analysis, and benchmarking
- Project management and technical engineering support
- Investment-grade audits and financial analysis
- Design performance specifications and scope-of-work support
- Incentive, financing, and grant application assistance
- Procurement support, bid analysis, and agency approval materials
- Construction management and project closeout support
- Peer learning through workshops, newsletters, conferences, and other outreach

Agencies may access the full suite of program offerings or select the services that best meet their needs. Each dedicated Project Manager also helps the agency navigate applicable SoCalREN, utility, resource, and third-party programs.

7. Audits

After a project is identified, the agency signs a project commitment form confirming its intention to pursue the project if it is determined to be viable. The EE PDP Project Manager and assigned engineer then conduct a detailed facility audit or site visit to identify potential energy efficiency measures.

Following the agency's selection of measures, the program prepares audit calculations and a project proposal. The proposal may include recommended operational and maintenance improvements, equipment and control upgrades, estimated project costs, projected energy bill savings, available incentives, and financing options. After installation, the EE PDP team works with the agency and contractor to verify the completed project and collect the closeout documentation required by the applicable resource program.

8. Program Quality Assurance Provisions

Quality assurance activities are incorporated throughout project identification, design, procurement, construction, and closeout. These activities include:

- Standardized project-delivery tools and templates
- Internal quality-control review of project deliverables and application materials
- Tracking agency data, projects, and milestones in SoCalREN's secure customer relationship management platform
- Review of contractor submittals and verification of work against design specifications
- Quarterly reviews of progress toward key performance indicators
- Project closeout surveys and annual customer feedback

EE PDP also uses a comprehensive Project Delivery Manual to guide Project Managers and engineers and support consistent application of quality-control practices throughout project delivery

9. Other Program Metrics

EE PDP tracks program delivery, participation, equity, environmental benefits, and customer outcomes, including:

- Projects channeled by resource program
- Active and completed projects and lifetime bill savings
- Projects receiving project management support
- Projects receiving energy audit or savings analysis services
- Projects receiving incentive or financing application assistance
- Projects receiving procurement or construction phase support
- New agency enrollments and agencies receiving energy efficiency support
- Energy-use analysis and benchmarking support
- Projects delivered to underserved agency sites
- Outreach activities and educational materials
- Customer satisfaction
- New construction jobs

Because EE PDP is a non-resource program, energy savings are claimed through the applicable resource programs rather than directly by EE PDP. Program and project information is tracked through SoCalREN's customer relationship management platform and reviewed periodically to assess progress and identify opportunities for improvement.