



ENERGY EFFICIENCY PROGRAMS

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**SoCaIREN Public Sector**  
**Public Agency Streamlined**  
**Savings Pathway**  
**Program Implementation Plan**

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

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## Program Overview

The Southern California Regional Energy Network (SoCalREN) Streamlined Savings Pathway (SSP) fills public sector market gaps by providing public agencies with an expedited pathway to implement comprehensive energy efficiency projects. SSP creates a viable pathway for public agencies to develop energy projects and capture verifiable electric and gas savings. SSP offers monetary incentives for qualifying energy efficiency upgrades based on lifecycle greenhouse gas (GHG) emission reductions. Enhanced incentives will be offered to encourage and facilitate energy savings in underserved and hard-to-reach communities. Agencies participating in SSP will receive technical expertise and project management services throughout their projects and at no cost through the Project Delivery Program and Pathway to Zero Program (both non-resource programs). Cumulatively, the joint offerings of the SoCalREN PDP, Pathway to Zero, and SSP Programs unlock a streamlined and expedited energy efficiency project delivery experience for the public sector, empowering and equipping public agencies to leap into the clean energy future.

## Program Budget and Savings

1. Program and/or Sub-Program Name  
Streamlined Savings Pathway
2. Program / Sub-Program ID number  
SCR-PUBL-B4
3. Program / Sub-program Budget Table

**Table 1: Program Budget Breakdown**

Year	Incentive	Admin	Marketing/Outreach	Direct Implementation	Total
2024	\$363,350.19	\$0	\$58,758.00	\$231,787.40	\$653,895.59
2025	\$872,093.32	\$0	\$103,649.00	\$769,629.40	\$1,745,371.72
<b>2026</b>	\$869,316.40	\$0	\$138,344.00	\$1,207,460.40	\$2,215,120.80
<b>2027</b>	\$1,076,656.29	\$0	\$181,907.00	\$1,769,144.40	\$3,027,707.69

4. Program / Sub-program Gross Impacts Table

**Table 2: Program Gross Impacts Tables**

Year	Total System Benefit Claimed
2024	\$900,000

2025	\$1,400,000
2026	\$2,100,000
2027	\$3,200,000

5. Program / Sub-Program Cost Effectiveness (TRC)

**Table 3: Program Cost-Effectiveness**

Year	TRC
2024	0.71
2025	0.55
2026	0.57
2027	0.43

6. Program / Sub-Program Cost Effectiveness (PAC)

**Table 4: Program Cost-Effectiveness**

Year	PAC
2024	1.46
2025	1.37
2026	1.54
2027	0.99

7. Type of Program / Sub-Program Implementer (PA-delivered, third party-delivered or Partnership)

Third Party Delivered

8. Market Sector(s) (i.e., residential, commercial, industrial, agricultural, public)

Public

9. Program / Sub-program Type (i.e., Non-resource, Resource)

Resource Acquisition

10. Market channel(s) (i.e., downstream, midstream, and/or upstream) and Intervention Strategies (e.g., direct install, incentive, finance, audit, technical assistance, etc.), campaign goals, and timeline.

Market channel: Downstream

Intervention strategy: Incentive

**Table 5: Campaign Goals and Timeline**

Phase	Key Deliverables	Dates
Launch Readiness	Implementation plan Marketing plan Program marketing materials Program management plan QA/QC Plan	Q1 2022
Program Ramp Up	Program launch to customers Marketing plan implementation Workpaper development/updates Project pipeline development	Q1 - Q2 2022
Program Steady State	Workpaper development/updates Energy savings realization and payouts	Q3 2022 - Q2 2023
Program Ramp Down	Program ramp down plan Energy savings realization and payouts	Q3 - Q4 2027

## Implementation Plan Narrative

### Program Description

SoCalREN's SSP will drive the implementation of energy efficiency projects that yield electricity and gas savings through an expedited and streamlined process. The program fills public sector market gaps left by closing utility programs and third-party programs that have yet to launch by addressing the cost of delay, lack of available funding, and limited program offerings focusing on underserved and hard-to-reach<sup>1</sup> public agencies. SSP will allow SoCalREN to continue serving customers and deliver on its mission to help public agencies increase energy efficiency adoption and lead their communities on a pathway to a clean energy future.

The SSP is designed as a downstream offering that will provide deemed and custom incentive opportunities based on lifecycle greenhouse gas (GHG) emission reductions. The program seeks to provide expedited project application reviews and to encourage and facilitate energy savings in underserved and hard-to-reach. This new offering will support agencies' resiliency efforts and will enable SoCalREN to further contribute to California's SB 350 goals, which seek to double energy efficiency savings in electricity final end uses by 2030. In alignment with statewide energy efficiency goals, the public agency SSP aims to achieve the following objectives:

1. Generate persistent and long-term electric savings (kWh and kW), gas savings (therms) and GHG emissions reductions to support program and state goals.
2. Increase energy efficiency program participation in underserved communities by offering enhanced monetary incentives to fund energy upgrades.
3. Mitigate the cost of project implementation delays for public agencies through an expedited incentive application review process. SSP will offer an estimated 10-business day turnaround for initial application processing, followed by an estimated 30-business day turnaround for application technical review.
4. Reduce project delays and complexities by leveraging in-house technical expertise and existing agency relationships.

The SSP reduces project delays and complexities for public agencies by implementing strict timelines for project application technical review and approval, and by leveraging start-to-finish technical services and financial analysis support at no-cost from a SoCalREN single point of contact who guides public agencies through SoCalREN's portfolio of energy programs. In addition, monetary incentives based on avoided GHG emissions over the life of the project, with enhanced incentive rates offered to underserved customers, support increased energy efficiency program participation. Starting in 2023, and for a limited time only, SSP will be offering enhanced incentives to help public agencies overcome obstacles to building decarbonization. These incentives will cover most or all of the eligible project costs associated with installing heat pump water heaters, making it easier and more cost-effective for agencies to ultimately make the switch to renewable energy.

Consistent with the ESJ Action Plan, the SSP objectives directly support the following ESJ Action Plan 2.0 goals in Table 6 below.

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<sup>1</sup> As defined by Cal. Pub. Util. Code Section 1601(e), and California Public Utility Commission Decision 23-06-055

**Table 6. Alignment and Support of ESJ Action Plan 2.0 Goals**

Program Objective	ESJ Action Goal Alignment	SoCalREN Core Value
Generate persistent and long-term electric savings (kWh and kW), gas savings (therms) and GHG emissions reductions to support program and state goals.	<p>Goal 2: Increase investment in clean energy resources to benefit ESJ communities, especially to improve local air quality and public health.</p> <p>Goal 4: Increase climate resiliency in ESJ communities.</p>	Economic Resilience, Climate Action Leadership
Increase energy efficiency program participation in underserved communities by offering enhanced monetary incentives to fund energy upgrades.	<p>Goal 1: Consistently integrate equity and access considerations throughout CPUC proceedings and other efforts.</p> <p>Goal 2: Increase investment in clean energy resources to benefit ESJ communities, especially to improve local air quality and public health.</p>	Economic Resilience, Climate Action Leadership, Equity
Mitigate the cost of project implementation delays for public agencies through an expedited incentive application review process. SSP will offer an estimated 10-business day turnaround for initial application processing, followed by an estimated 30-business day turnaround for application technical review.	Goal 4: Increase climate resiliency in ESJ communities.	Economic Resilience, Climate Action Leadership
Reduce project delays and complexities by leveraging in-house technical expertise and existing agency relationships.	Goal 4: Increase climate resiliency in ESJ communities.	Economic Resilience, Climate Action Leadership

### Program Delivery and Customer Services

The SoCalREN SSP will offer the following innovative services to public agencies to accelerate the implementation of energy efficiency projects: expedited in-house SoCalREN project application review process, monetary incentives based on lifecycle GHG reductions, and enhanced incentive rates for underserved and hard-to-reach customers. The SSP will prioritize facilities and infrastructure with high-value, comprehensive energy efficiency project



opportunities within underserved communities. Projects funneled through the SSP will receive technical expertise and project management services at no cost through the SoCalREN PDP and Pathway to Zero program. An assigned SoCalREN Project Manager, acting as a customer's single point of contact, will guide public agencies through all public sector offerings to mitigate customer confusion and ensure seamless service delivery across all programs. Projects submitted to the SSP will be reviewed and approved by a subcontracted engineering consultant held to strict timeline agreements for technical review. Custom SSP projects will be submitted through the Custom Measure and Project Archive (CMPA) process.

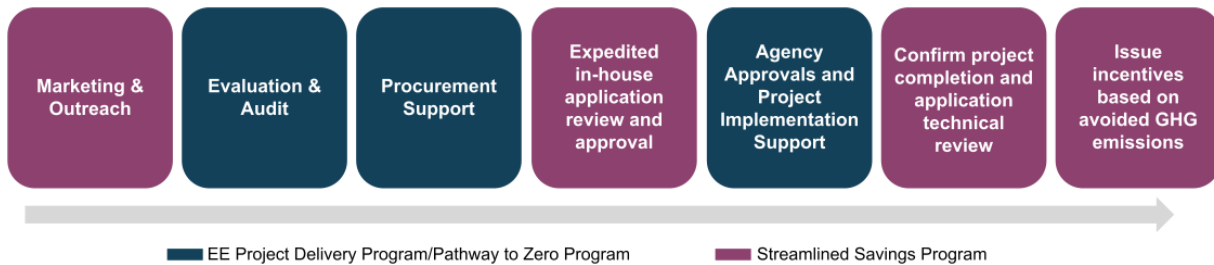
By leveraging the complementary technical support services provided by the PDP and Pathway to Zero program, the SSP will give public agencies streamlined access to cost and energy savings. Program strategies for expedited support include: exclusion of early screening phase typically required by third party and IOU core programs, 10-business day in-house processing and initial review of incentive applications, 30-business day technical review by contracted engineering consultant, and start-to-finish project management support from a SoCalREN Project Manager.

The SSP will be a resource program; therefore, energy efficiency savings from these projects will contribute to SoCalREN portfolio savings goals, Total System Benefit (TSB), and grid demand forecasting and resource planning. Monetary incentives are offered based on lifecycle avoided GHG emissions resulting from projects' resource savings (as measured by the CPUC's Avoided Cost Calculator required for the relevant program reporting year). Unlike traditional IOU and third-party programs that offer flat rate incentives for first-year electric and gas savings, incentive rates will be higher for underserved agencies given their heightened need for financial support.

The SSP will engage enrolled and unenrolled public agencies eligible for SoCalREN's programs, leveraging existing relationships and data analysis tools to identify opportunities for successful projects. The Program will conduct marketing and outreach to communicate the benefits of the SSP and what it means for each customer.

The SSP will deliver savings using a downstream intervention strategy where all services are offered through a third-party implementer. Potential SSP projects are funneled to SSP by either SoCalREN's PDP or Pathway to Zero program, which identify measure opportunities through either conducting a new energy efficiency audit or utilizing an existing audit of buildings and facilities. The SoCalREN PDP or Pathway to Zero program will complete engineering calculations to determine expected cost savings and energy savings for the project lifecycle based on energy consumption data and savings from the existing baseline associated with the measures included in the project scope. Once an agency confirms the project scope and selects to move forward with incentives through SSP, an incentive application is developed. Once submitted to SSP, applications will receive an initial review within 10 business days and a completed technical review within 30 business days following the initial review. After project approval and construction completion, the SSP will conduct a post-inspection (as needed) to verify implemented measures, update energy models and engineering calculations, determine final claimable lifetime savings and avoided GHG emissions, and finalize an incentive amount to be disbursed to the customer.

### **Figure 1. Streamlined Savings Pathway Participation Process**



Agencies participating in the SSP will benefit from a customized and comprehensive approach to technical assistance and project management through SoCalREN’s non-resource PDP and Pathway to Zero program. Services offered through these programs include project scoping, financial analysis, financial support services, procurement assistance, energy modeling, and engineering calculations. SoCalREN third-party engineers will support SSP projects from start to finish and help ensure their success. All of these services will be provided to agencies at no cost.

Starting in Q2 2023, SSP will include a heat pump water heater (HPWH) offering that aims to build towards California’s state climate goals by removing public agency barriers to decarbonizing their buildings. These barriers include educational barriers, funding gaps, contractor procurement barriers, and internal agency hurdles. To help agencies overcome these barriers, SoCalREN will be offering to cover up to 100% of the eligible project costs for HPWH installations at public agency facilities in underserved areas and up to 80% of the project cost at all other eligible agency facilities. Additionally, participants will have the option to have SoCalREN pay the incentives directly to the contractor once the project is completed. This will allow participating public agencies to forgo reserving large amounts of internal funds to complete the project that would eventually be reimbursed with the SoCalREN cash incentives.

*Target Markets and Served Population*

SoCalREN’s SSP will target enrolled and unenrolled public agencies within SoCalREN’s eligible service territory. Enrollment in the SoCalREN PDP or Pathway to Zero program is a prerequisite for participation in SSP. There are over 700 agencies in the SoCalREN territory that are eligible to enroll and participate in SSP. This includes cities, counties, tribes, school districts, water districts, sanitation districts, and other special districts. There will also be a targeted effort to focus on and deliver services to underserved communities.

*Proposed Measures and Treatment*

The SSP is a resource program that will promote long-term energy savings from energy efficiency projects, resulting in reduced GHG emissions, cost savings, and increased energy savings for public agencies. Eligible energy efficiency measures will include downstream deemed and custom measures. Reported energy savings claims will be based on deemed measures in the adopted California Electronic Technical Reference Manual (eTRM) and approved work papers as well as calculated savings for eligible custom measures.

Target end uses and measures may include, but are not limited to, those outlined in Table 7 below. Additional measures will be evaluated and added to the program offerings as necessary.

**Table 7. Target End Uses and Target Measures**

Target End Use	Target Measures
HVAC	<ul style="list-style-type: none"> <li>• Demand control ventilation</li> <li>• HVAC controls and occupancy sensors</li> <li>• Supply fan variable frequency drive (VFD)</li> <li>• Packaged units</li> <li>• RTU/AHU/c</li> <li>• filter optimization or replacement</li> <li>• Economizer add-on equipment and controls</li> <li>• Evaporative precoolers</li> <li>• Supply air reset</li> <li>• Temperature deck reset</li> <li>• Condenser water reset</li> <li>• DCV SDEC and CO2 sensor</li> <li>• AC unit VFD</li> <li>• HVAC equipment replacement</li> <li>• HVAC tune up</li> <li>• Furnace replacements</li> </ul>
Lighting	<ul style="list-style-type: none"> <li>• Interior lighting</li> <li>• High bay lighting</li> <li>• Integrated retrofit kit for troffer</li> <li>• T8 replacement</li> <li>• Exterior lighting</li> <li>• LED roadway lighting</li> <li>• Lighting controls and occupancy sensors</li> </ul>
Pumping	<ul style="list-style-type: none"> <li>• Pump overhauls</li> <li>• Pump replacements</li> <li>• Pump sequencing/scheduling</li> <li>• Pump VFD</li> </ul>
Process Optimization	<ul style="list-style-type: none"> <li>• Optimize fluid flow system</li> <li>• Optimize zone pressure</li> <li>• Aeration Blower VFD</li> <li>• Chemically-enhanced primary sedimentation (CEPS)</li> <li>• Ammonia-based aeration controls</li> <li>• Blower sequencing/scheduling</li> <li>• Return activated sludge (RAS)/waste activated sludge (WAS) optimization</li> <li>• UV tertiary treatment upgrade</li> <li>• Ultra-fine pore diffuser retrofit</li> <li>• Wastewater controls automation</li> </ul>
Service and Domestic Hot Water	<ul style="list-style-type: none"> <li>• Heat pump water heaters</li> <li>• Gas Water Heaters</li> </ul>

## Program Design and Best Practices

### Key Program Activities

**Engage in program marketing and outreach.** SoCalREN will introduce SSP and its services to all existing and newly enrolled public agencies. Agencies will be notified if their current projects are good candidates for the new program and will learn how program services can support their planned and future projects. Education through marketing and outreach helps

agencies recognize the opportunity and value of services and understand the various programs and technical resources available to support project implementation.

**Expedited in-house processing and review of project incentive applications.** In-house application processing mitigates communication and coordination delays typically experienced when projects are channeled to external energy efficiency programs. The program will adhere to a goal of 10 business days for the initial review process to expedite project implementation.

**Expedited technical review and approval of project incentive applications by contracted engineering consultant.** The application package will be reviewed by a SoCalREN engineering subconsultant and be held to strict timelines for review and approval of project application packages. Streamlined processing will shorten the time period between project identification and construction completion, enabling agencies and their communities to realize savings sooner and avoid the costs of delay.

**Review project closeout documentation.** SoCalREN will review project closeout documentation to finalize the incentive amount to be issued to the customer.

**Conduct post-installation inspection as needed.** If required, SoCalREN will conduct a post-installation inspection for completed projects to ensure the project is installed per the agency's selected scope and in alignment with deemed and custom program requirements.

**Technical review and approval of completed projects by contracted engineering consultants.** The SoCalREN third-party implementer will subcontract with experienced engineering firms to perform rigorous post-installation technical review to verify measure installation and finalize energy savings.

**Issue incentives based on lifecycle avoided GHG emissions to reduce up-front capital costs for retrofits and system upgrades.** Incentives will be based on the project's total resource lifecycle avoided GHG emissions. Incentives are critical to helping public sector customers overcome funding and financing barriers by reducing the up-front cost of capital for projects.

#### *Short-Term Tactics (Program Launch)*

**Launch of Streamlined Savings Pathway with enrolled SoCalREN agencies.** Upon approval by the Commission, SoCalREN will develop and upload a Program Implementation Plan and Program Manual to CEDARs through the required process. SoCalREN will also develop tracking and reporting processes for key performance metrics and program outcomes. SoCalREN will market the program through collateral, presentations, social media, and website integration. SSP will create internal tools, processes, and templates to ensure a successful program. Current and newly enrolled participating agencies will be introduced to the new SSP and services.

**Identify and develop a potential project pipeline of viable projects with long-term persistent EE and GHG savings.** Agencies will be notified if their active projects are good candidates for the new SSP program and will learn how program services can support their future projects. SoCalREN will track projects identified and key data points to demonstrate measurable progress toward the achievement of program goals.

**Establish protocol for working with program participants and industry partners.** SoCalREN will develop program processes and procedures to deliver a streamlined, user-friendly program. Coordination with industry partners, including IOUs and third-party implementers will help mitigate customer confusion about program offerings and opportunities. Since the Public Agency Programs launched in 2013, SoCalREN has demonstrated successful coordination with industry partners to ensure disjointed program offerings are introduced to agencies in a streamlined fashion to avoid decision fatigue and potential project delays. Participant and stakeholder coordination will ensure program “double-dipping” is avoided and savings are not double-counted across multiple resource programs.

#### *Mid-Term Outcomes (Program Ramp-Up)*

**Incorporate lessons learned to improve and streamline program design.** SoCalREN's organizational structure affords nimble and quick adaptation to evolving customer needs. Feedback and lessons learned will be discussed and incorporated into the program design to improve program efficiency and service offerings.

**Begin reporting savings and increase the pipeline of projects with potential energy savings.** Completed projects will be reported in the program year in which the installation report is submitted for custom projects or when the deemed application is submitted. SoCalREN will work with agencies to develop an ongoing pipeline of projects with the potential for deep, long-lasting energy savings.

**Implement increasingly complex energy efficiency measures.** Program participants will be motivated to implement comprehensive and complex energy efficiency measures with persistent savings due to the nature of a lifecycle GHG-based incentive structure.

#### *Long-Term Outcomes (Program Steady-State)*

**Operate a reliable program that delivers increased penetration of energy efficiency measures at the site and market levels.** The program will offer public agencies an incentivized program to drive energy projects forward. SSP will increase customer knowledge and awareness of the benefits of energy efficiency measures and programs, ultimately increasing the long-term penetration of measures and future uptake of energy efficiency programs.

**Long-term reduction in kWh, kW, therms and GHGs.** The program will encourage measures with deep, long-lasting savings, offering attractive incentives for measures with long effective useful lives (EULs).

**Support long-term strategic goals (e.g. AB 32, SB 350, etc.).** Deep, persistent savings and GHGs avoided through the program's projects will contribute to the state's long-term strategic goals.

### *Market Barriers Addressed and Program Best Practices*

Several market barriers faced by public sector customers in the SoCalREN service area are addressed through the SSP.

**Barrier 1:** Program offerings that focus on underserved public agencies are limited. Underserved public agencies may face significant capital barriers when considering energy efficiency upgrades. While the SSP enables all public agencies to pursue energy projects that result in energy, cost, and GHG savings for their communities, underserved agencies will be called to action through the provision of a higher incentive rate.

#### **Best Practices**

- Increased incentive values for underserved agencies.
- Incentives rates based on lifetime GHG emissions, which encourages investment in long-term emissions reductions.

**Barrier 2:** Lengthy project review and approval times. Traditionally, the program offerings available to public agencies have lengthy review and processing times, which can lead to a significant cost of delay for the project. The SSP will expedite processing times by leveraging subcontracted engineering consultants to review and approve project applications. The program will adhere to strict timeline agreements for technical review, allowing public agencies to realize energy and cost savings sooner.

#### **Best Practice**

- Expedited reviews of program applications to mitigate the cost of delay and ensure savings are realized as soon as possible. Applications will receive a preliminary review within 10 business days from application submission, and will receive an in-depth technical review within 30 business days from the preliminary review.

**Barrier 3:** Lack of available funding and financing. Financing capital upgrades often requires multiple funding strategies. Third-party programs offer limited funding and financing support to the public sector. SPP's monetary incentives will provide needed funding, alongside the SoCalREN PDP and Pathway to Zero no-cost services that allow agencies to continue developing and implementing energy saving projects.

#### **Best Practices**

- Support comprehensive whole building energy efficiency projects, combining elements of mechanical replacement, retrocommissioning, weatherization, and lighting where possible to optimize financials and support project approval.

- Screen projects for all available funding and financing combinations, including SSP incentives and SoCalREN Revolving Savings Fund loan offerings, as applicable.

**Barrier 4:** Lack of resources and technical expertise in the public sector to pursue EE programs. Public sector customers often lack the in-house resources and technical expertise to apply for and secure funding and financing for energy efficiency projects. The SoCalREN PDP and Pathway to Zero programs provide critical resources to assist enrolled agencies with identifying viable projects and applying for SSP monetary incentives.

**Best Practice**

- A dedicated SoCalREN Project Manager is assigned to each enrolled agency and guides the agency through project identification, viability assessment, and funding/financing applications across the suite of SoCalREN Public Agency Programs.

**Innovation**

**Lifecycle avoided GHG incentive structure prioritizing underserved communities.** SoCalREN is proposing an innovative incentive structure that drives persistent energy savings, contributes to the State’s energy efficiency goals, and prioritizes underserved communities. Incentives will be offered to agencies based on cumulative avoided GHG emissions resulting from projects’ total lifecycle resource energy savings. This incentive structure aligns incentives to the grid impact and TRC of each measure, along with the project’s contribution to long-term energy reduction goals. This approach also captures full benefits of fuel substitution measures. Unlike traditional Southern California Edison (SCE) and Southern California Gas (SoCalGas) programs that offer flat rate incentives on first-year electric and gas savings, SSP will offer enhanced incentives for underserved agencies. SoCalREN believes this structure will promote deep, long-lasting energy savings.

**Expedited program application reviews & approvals.** In coordination with SoCalREN’s non-resource PDP and Pathway to Zero program, project identification, scoping, application submissions, reviews, and approvals are comprehensively housed under the SoCalREN Public Agency program portfolio. This comprehensive, start-to-finish support and streamlining of services ensures a smooth project delivery process for participating agencies and reduces the administrative hurdles associated with project handoff to outside parties. Projects participating in the SSP will have a dedicated SoCalREN Project Manager coordinating complimentary services between the SoCalREN non-resource programs and the SSP to present a comprehensive, turnkey solution to the agency.

**Metrics**

**Table 8. Annual Program Savings Targets**

Year	Number of completed projects	Total System Benefit Claimed	Lifecycle GHG Emissions Avoided
2024	28	\$900,000	6,185
2025	42	\$1,400,000	9,277

2026	62	\$2,100,000	13,915
2027	94	\$3,200,000	20,873

### To-Code Savings Claims

This section is not applicable.

### Pilots

No pilots are currently planned.

### Workforce Education and Training

This section is not applicable.

### Workforce Standards

SSP 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 compliance checks during the project lifecycle to ensure projects installed comply with CPUC Workforce Standards as stipulated in D.18-10-008. The SSP will ensure the following requirements are met:

- Installation, modification, or maintenance of incentivized HVAC measures of \$3,000 or more will be required to be installed by workers or technicians who meet at least one of the following:
  - Enrolled in and/or completed an accredited HVAC internship;
  - 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;
  - Has a C-20 HVAC contractor license issued by the California Contractors State License Board (CSLB), and;
  - The standards outlined in D. 18-10-008<sup>2</sup> will be required for Direct Install projects.
- Installation of incentivized lighting control measures of \$2,000 or more will be required to be installed by technicians who have completed the California Advanced Lighting Controls Training Program (CALCTP).
- Installation of incentivized water heater measures will be required to be installed by technicians who hold both a:
  - C36 Plumbing license issued by the California Contractors State License Board (CSLB)
  - C10 Electrical license issued by the California Contractors State License Board (CSLB)

<sup>2</sup> <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M251/K782/251782504.PDF>



SSP will ensure compliance by requesting that agencies confirm the requirements will be met on both the application and installation review package materials.

### **Disadvantaged Worker Plan**

This section is not applicable. Each public agency follows their own procurement requirements.

### **Additional Information**

This section is not applicable.

## Supporting Documents

### Program Manual and Program Rules

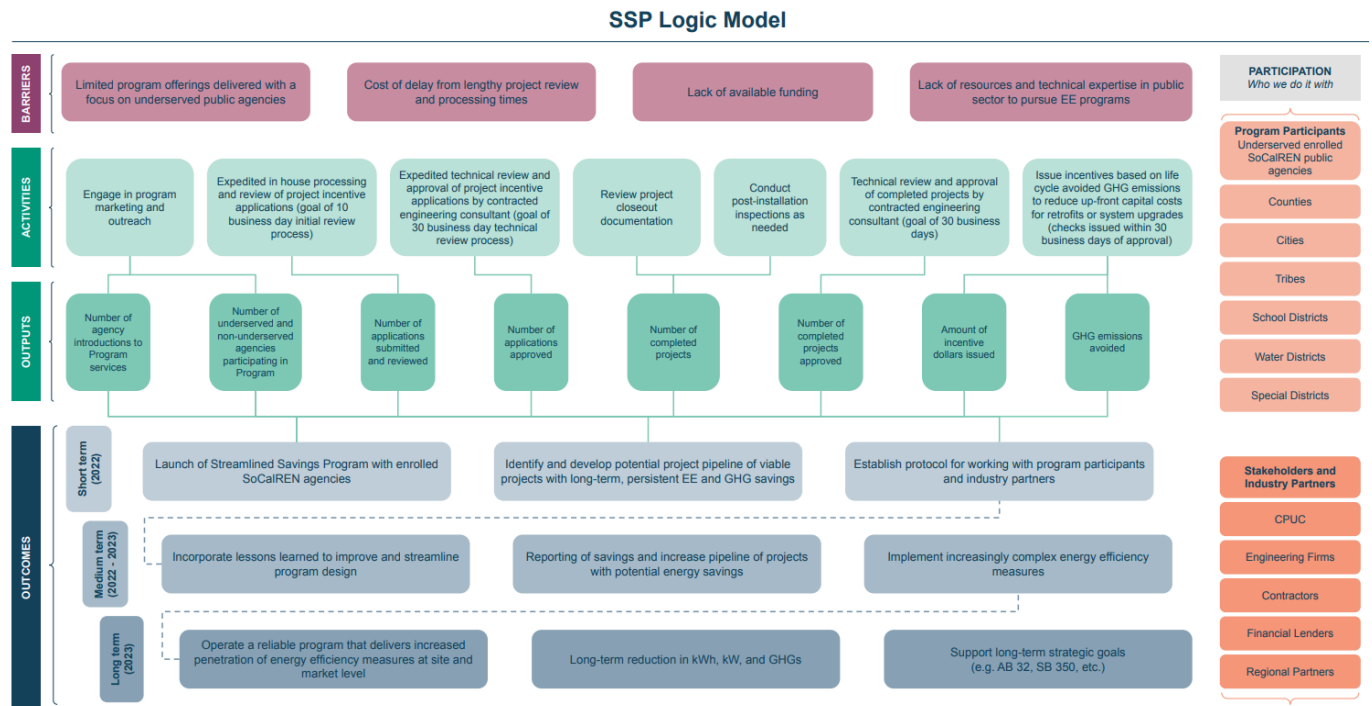
See separate program manual document outlining program rules and processes.

### Program Theory and Program Logic Model

The program theory is that incentives based on GHG reductions will encourage public sector agencies to pursue projects that will result in deeper energy savings over the projects' lifetime. By aligning the incentives to the grid impacts of efficiency measures, the program aligns with the state's GHG reduction goals and those of the public agencies SoCalREN serves. The program prioritizes underserved participant agencies who will be awarded a higher incentive rate.

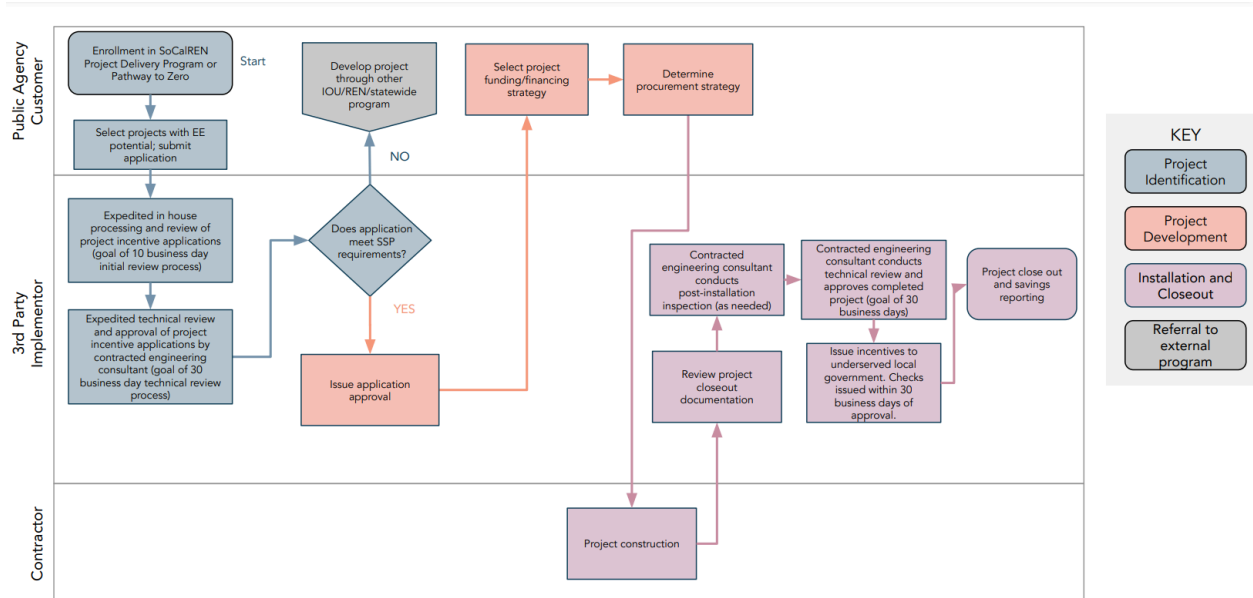
Through participation in the SSP, SoCalREN expects that public agencies will generate deep kWh, kW, and therms savings and create long-lasting benefits for their communities resulting in a more safe, secure, resilient, affordable, and sustainable clean energy future.

Figure 2. Streamlined Savings Pathway Logic Model



### Process Flow Chart

Figure 3. Streamlined Savings Pathway Flow Chart



## Incentive Tables, Workpapers, and Software Tools

Table 9. Target Measures and Relevant Workpapers

Target End Use	Target Measures	Relevant Workpapers
HVAC	<ul style="list-style-type: none"> <li>• Demand control ventilation</li> <li>• HVAC controls and occupancy sensors</li> <li>• Supply fan variable frequency drive (VFD)</li> <li>• Packaged units</li> <li>• RTU/AHU/Chiller optimization or replacement</li> <li>• Economizer add-on equipment and controls</li> <li>• Evaporative precoolers</li> <li>• Supply air reset</li> <li>• Temperature deck reset</li> <li>• Condenser water reset</li> <li>• DCV SDEC and CO2 sensor</li> <li>• AC unit VFD</li> <li>• HVAC equipment replacement</li> <li>• HVAC tune up</li> <li>• Furnace</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">SWHC006-01</a> (demand control ventilation)</li> <li>• <a href="#">SWHC023-02</a> (enhanced ventilation)</li> <li>• <a href="#">SWHC042-02</a> (evaporative pre-coolers)</li> <li>• <a href="#">SWHC018-02</a> (HVAC fan controls VSD)</li> <li>• <a href="#">SWHC011-03</a> (furnace)</li> </ul>
Lighting	<ul style="list-style-type: none"> <li>• Interior lighting</li> <li>• High bay lighting</li> <li>• Integrated retrofit kit for troffer</li> <li>• T8 replacement</li> <li>• Exterior lighting</li> <li>• LED roadway lighting</li> <li>• Lighting controls and occupancy sensors</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">SWLG011-03</a> (high bay)</li> <li>• <a href="#">SWLG012-01</a> (retrofit kits)</li> <li>• <a href="#">SWLG009-02</a> (T8 lamps)</li> <li>• <a href="#">SWLG018-01</a> (LED tube type B &amp; C)</li> </ul>
Pumping	<ul style="list-style-type: none"> <li>• Pump overhauls</li> <li>• Pump replacements</li> <li>• Pump sequencing/scheduling</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">SWWP004-01</a> (pump upgrade)</li> <li>• <a href="#">SWWP002-02</a> (VFD on well pump)</li> </ul>

	<ul style="list-style-type: none"> <li>• Pump VFD</li> </ul>	
Process Optimization	<ul style="list-style-type: none"> <li>• Optimize fluid flow system</li> <li>• Optimize zone pressure</li> <li>• Aeration blower VFD</li> <li>• Chemically-enhanced primary sedimentation (CEPS)</li> <li>• Ammonia-based aeration controls</li> <li>• Blower sequencing/scheduling</li> <li>• Return activated sludge (RAS)/waste activated sludge (WAS) optimization</li> <li>• UV tertiary treatment upgrade</li> <li>• Ultra-fine pore diffuser retrofit</li> <li>• Wastewater controls automation</li> </ul>	
Service and Domestic Hot Water	<ul style="list-style-type: none"> <li>• Heat pump water heaters</li> <li>• Gas water heater</li> </ul>	<ul style="list-style-type: none"> <li>• SWWH027-03 (small - fuel substitution)</li> <li>• SWWH028-02 (large - fuel substitution)</li> <li>• SWWH031-02 (electric only)</li> <li>• SWWH007-05 (gas storage water heater)</li> </ul>

## Program Indicators

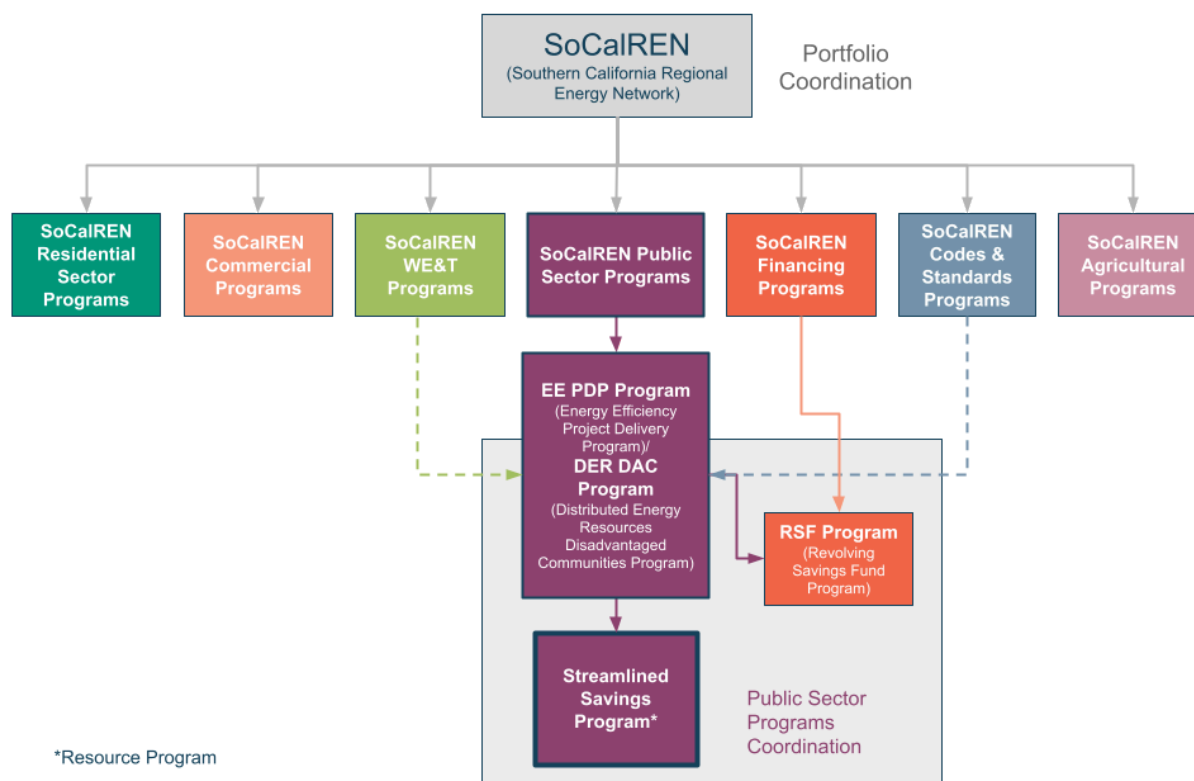
**Table 10. Quantitative Program Indicators**

#	Metric	Method	Frequency
1	Number of agencies Introduced to Program services	Program engagement presentations and Project Proposals delivered outlining SSP opportunities	Annually
2	Number of underserved and non-underserved agencies participating in Program	Projects submitted to the program	Annually
3	Number of applications submitted and reviewed	Projects submitted for technical review	Annually
4	Number of applications approved	Count submitted to CPUC	Quarterly
5	Number of completed projects approved	Count with post-installation technical review completed	Annually
6	Amount of incentive dollars issued	Dollars disbursed to agencies	Quarterly
7	GHG emissions avoided	Calculated lifecycle reductions	Quarterly
8	kWh savings	Gross annual kWh	Quarterly
9	kW Savings	Gross annual kW	Quarterly

10	Therms Savings	Gross annual therms	Quarterly
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## Diagram of Program

Figure 4. Streamlined Savings Pathway Program Diagram



## Evaluation, Measurement, and Verification (EM&V)

Program level evaluation, measurement, and verification (EM&V) activities may be conducted at various intervals during the program cycle to inform program improvements and future program design. The SSP implementation process involves the following steps to ensure program services and data points are tracked and quality controlled so that data can be readily accessed for EM&V studies:

1. **Data Management in secure SoCalREN customer relationship management (CRM) platform:** Agency-level and project-level data and milestones are tracked in a centralized cloud-based platform. This centralized data hub allows for the development of detailed reports and dashboards to track progress towards program goals and key performance indicators.
2. **Deliverable quality control checks:** All project deliverables and project application materials are put through rigorous internal quality control checks prior to being delivered to clients, third-party technical reviewers, or the CPUC.

3. **Contracted engineering consultant technical review:** After the program conducts an internal review of each project application package to ensure completeness and quality control, each project application undergoes a robust technical review from a contracted engineering consultant with extensive experience in utility and incentive program application reviews.
4. **Quarterly review of progress toward key performance indicators:** Utilizing the data stored in the SoCalREN CRM, program progress toward key performance indicators (KPIs) will be evaluated at least quarterly to track progress and identify areas for program improvement.
5. **Project closeout surveys and customer feedback solicitation:** Customer feedback is collected in the form of a survey upon completion of every project. Feedback is solicited on the program services utilized, the standard of customer service, and recommendations for program improvements. Further, the SoCalREN Public Agency Programs deliver annual customer surveys to collect portfolio level feedback. This allows for iterative program enhancements to the suite of SoCalREN Public Agency Programs, including SSP.

### Normalized Metered Energy Consumption (NMEC)

This section is not applicable.