Application: 26-03-xx
(CPUC #940)
Exhibit #: 2
Date: March 16, 2026
Witness(es): Various

SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK

2028–2035 PORTFOLIO PLAN PROGRAM CARDS

EXHIBIT 2

SoCalREN

SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK
ENERGY EFFICIENCY 2028-2035 STRATEGIC BUSINESS PLAN AND 2028-2031 PORTFOLIO PLAN

TABLE OF CONTENTS

SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK
ENERGY EFFICIENCY 2028-2035 STRATEGIC BUSINESS PLAN AND 2028-2031 PORTFOLIO PLAN

TABLE OF CONTENTS

SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK
ENERGY EFFICIENCY 2028-2035 STRATEGIC BUSINESS PLAN AND 2028-2031 PORTFOLIO PLAN

TABLE OF CONTENTS

2028–2035 PORTFOLIO PLAN TEMPLATE

Built using guidance document provided by CPUC on 02/04/2026

CONTENTS

Exhibit 2: Program Cards

A. Agriculture Sector

1. Agriculture Project Delivery Program (Ag-PDP)

<table>
<tr><th colspan="3">Program Name: Agriculture Project Delivery Program (Ag-PDP)</th></tr>
<tr><td colspan="3">Program ID: SCR-AGR-G1
New/Existing: Existing
Expected Program Duration: 2028–onward</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)
Market Support</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)
Third-Party Solicited</td><td>Third-Party Program Implementer (applicable to IOUs only):
N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)
Agricultural</td><td>Customer Group(s):
Agricultural</td></tr>
<tr><td colspan="2">Sector Challenges:
Limited existing program offerings available with a focus on underserved agricultural producers; Lack of available resources as incentives for these customers are costly to implement.</td><td>Sector Opportunities (Expected Outcome(s):
Increased participation in EE program, with a focus on underserved communities, and adoption of EE measures.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):
The Ag PDP program's goal is to identify and implement cost-effective energy efficiency projects that yield electricity and gas savings for disadvantaged, small and medium, rural, and underserved agriculture communities/customers across the region. Ag PDP aims to:
1. Expand the implementation of cost-effective energy efficiency projects; 2. Make energy efficiency expertise accessible and available; and 3. Integrate energy efficiency as a standard business practice for Agriculture customers.</td></tr>
<tr><td colspan="2">Known Equity Concerns in the Selected Markets (if applicable):
Underserved HTR, DAC, and small-scale agricultural customers face barriers to incentive access.</td><td>Proposed Solutions to Equity Concerns (if applicable):
Offer enhanced guidance and technical support for underserved agricultural sector customers to identify and implement energy efficiency projects; expand vendor network to serve the region.</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: Agriculture Project Delivery Program (Ag-PDP)</th></tr>
<tr><td>Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

Marketing & Outreach/Information, Technical Assistance</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)

Downstream</td></tr>
<tr><td>Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)

N/A</td><td>Program Total System Benefit (TSB) for 2028-2031:

N/A</td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $914,110

2029: $1,068,022

2030: $1,154,821

2031: $1,250,307</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

N/A</td></tr>
<tr><td>Anticipated directional and scale changes in budget for years 2032-2035:

Anticipated gradual budget increases year-over-year to account for increased market penetration.</td><td>Market Actors necessary for success:

Agriculture Customers, Contractors, Energy Engineers</td></tr>
<tr><td colspan="2">High-level description of delivery workforce including necessary scale and its risks:

Workforce requirements include vendor contractors, equipment suppliers, and logistics providers. Increased import costs, rising costs of equipment or materials, or disruptions in delivery infrastructure could pose a risk to program effectiveness.</td></tr>
<tr><td colspan="2">Near-Term Program Output(s) (1-4 years):

Customers receive guidance and technical support to identify cost-effective EE opportunities; development of project that reduce cost and technical barriers; expanded pipeline of EE projects prepared for implementation; increased participation from trade allies and vendors; create jobs; increased market adoption of uncommon EE technologies for this segment; increased understanding of energy and GHG impacts across Ag systems; Remove cost and technical barriers to implement EE measures.</td></tr>
<tr><td colspan="2">Long-Term Outcome (5-10 years):

Environmental and non-energy benefits achieved; energy savings persist; expanded availability of higher-efficiency agricultural technologies; develop new equipment efficiency standards at the State & Federal level; EE technologies and processes become standard practice in this Customer Segment; increased</td></tr>
</table>

Program Name: Agriculture Project Delivery Program (Ag-PDP)	
market penetration of higher efficiency equipment; Measurable reduction in kW, kWh, Therm usage across entire segment.	
Does this program interact with other programs in this PA portfolio? If so, describe: Yes, this PA offers two other programs in the agricultural sector (Rural-HTR Agricultural DI and Agricultural Retrofit), and two related programs, one in the finance sector (Rural-HTR Agriculture Finance Assistance Program) and one in the Cross-Cutting sector (Agriculture Workforce, Education and Training Program). All five programs are designed to complement each other and coordinate on providing holistic services for agricultural customers.	
Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Examples could include homes electrified, WE&T trainings held, etc.) Customer enrollment; Increased pipeline; Program savings contribution to market share; Job Creation; Capacity & Expertise; Customized Services; Educational Materials; Customer Satisfaction; Completed Projects in Disadvantaged Communities; Regional Environmental Benefits. Increased demand for energy-efficient products or services among SoCalREN targeted groups.	
Does this program utilize Integrated Demand Side Management (IDSM)? EE/DR, Multi-DER IDSM, other or none Multi-DER IDSM	**Link to Existing Implementation Plan, if existing:** N/A - draft

2. Agriculture Retrofit

<table>
<tr><th colspan="3">Program Name: Agriculture Retrofit</th></tr>
<tr><td colspan="3">Program ID: SCR-AGR-G3

New / Existing: Existing

Expected Program Duration: 2028 - onwards</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Resource Acquisition</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

Third-Party Solicited</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)
Agricultural</td><td>Customer Group(s):

Agricultural</td></tr>
<tr><td colspan="2">Sector Challenges:

Limited existing program offerings available with a focus on disadvantaged, rural, hard-to-reach, and small to medium agricultural customers.</td><td>Sector Opportunities (Expected Outcome(s)):

Increased participation in EE program and adoption of EE measures; integration of EE as a standard business practice in agriculture communities.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The goal of the Agriculture Retrofit program is to drive the installation of cost-effective solutions for underserved, rural, HTR, and small to medium agriculture customers. The program aims to support these customers through a combination of strategic outreach and relevant technical assistance to drive customer awareness of both energy efficiency (EE) and non-EE measure benefits. The Agriculture Retrofit program aims to implement multi-tiered outreach and education strategies to support underserved agricultural customers to understand and access energy efficiency upgrades. The program offers agricultural customers incentives for HVAC, lighting, water, heating, etc. measures.</td></tr>
<tr><td colspan="2">Known Equity Concerns in the Selected Markets (if applicable):

Limited understanding of and access to energy efficiency opportunities for underserved agricultural customers; Limited access to capital to fund energy efficiency upgrades; Language and geographic barriers, and lack of vendor coverage.</td><td>Proposed Solutions to Equity Concerns (if applicable):

Provide tailored outreach and enhanced energy efficiency rebate incentives for underserved agricultural customers.</td></tr>
<tr><td colspan="2">Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)</td></tr>
</table>

Program Name: Agriculture Retrofit	
Incentive/Rebate, Technical Assistance	*Downstream*
Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other) *Deemed, Custom, NMEC*	**Program Total System Benefit (TSB) for 2028-2031: $58,283,346**
Annual Budgets for 2028-2031: **2028:** $3,380,620 **2029:** $3,968,682 **2030:** $4,285,539 **2031:** $4,634,105	**Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:** **TRC:** 1.53 **PAC:** 3.69
Anticipated directional and scale changes in budget for years 2032-2035: Anticipated gradual budget increases year-over-year to account for increased market penetration.	**Market Actors necessary for success:** Agriculture Customers, Contractors, Energy Engineers
High-level description of delivery workforce including necessary scale and its risks: Workforce requirements include vendors, contractors, equipment suppliers, and logistics providers. Increased import costs, rising costs of equipment or materials, or disruptions in delivery infrastructure could pose a risk to program effectiveness.	
Near-term Program Output(s) (1-4 years): Completed **incentivized EE retrofit projects** resulting in measurable annual energy and demand savings; Increased customer uptake of **higher-efficiency equipment** driven by rebates and technical support; Participating Trade Allies stock & promote higher efficiency equipment to other stakeholders; Expanded pipeline of retrofit projects generated through **coordinated outreach and guidance**; Greater contractor engagement and expanded vendor participation in agricultural retrofit work; Increased customer understanding of **cost-benefit trade-offs** for deeper retrofit projects. increased market adoption of uncommon EE technologies for this segment; customers understand the significant and costly energy in their Ag Systems; Install EE projects on Ag Systems; Remove cost and technical barriers to implement EE measures; customers understand energy and GHG impact of their equipment; increase trade ally enrollment incrementally per year.	
Long Term Outcome (5-10 years):	

Program Name: Agriculture Retrofit	
Environmental and non-energy benefits achieved; energy savings persist; develop new equipment efficiency standards at the State & Federal level; EE technologies and processes become standard practice in this Customer Segment; increased market availability and affordability of higher efficiency equipment in agriculture sector; Measurable reduction in kW, kWh, Therm usage; Ag EE technologies become standard; Sustained contribution to statewide GHG and energy reduction goals through retrofit-based projects.	
Does this program interact with other programs in this PA portfolio? If so, describe: This PA offers two other programs in the agricultural sector (Rural-HTR Agricultural DI and Agricultural Project Delivery Program), and two related programs, one in the finance sector (Rural-HTR Agriculture Finance Assistance Program) and one in the Cross-Cutting sector (Agriculture Workforce, Education and Training Program). All five programs are designed to complement each other and coordinate on providing holistic services for agricultural customers.	
Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Examples could include homes electrified, WE&T trainings held, etc.) Customer enrollment; Increased pipeline; Program savings contribution to market share; Job Creation; Capacity & Expertise; Customized Services; Educational Materials; Customer Satisfaction; Completed Projects in Disadvantaged Communities; Regional Environmental Benefits; Increased demand for energy-efficient products or services among SoCalREN targeted groups; Access to capital for green energy and energy-saving projects. Quantitative Targets (annualized first year and lifecycle): Electric Savings gross; Electric savings net; Electric demand savings gross; Electric demand savings net.	
Does this program utilize Integrated Demand Side Management (IDSM)? EE/DR, Multi-DER IDSM, other or none Multi-DER IDSM	**Link to Existing Implementation Plan, if existing:** N/A - draft

3. Rural Hard-to-Reach (HTR) Agriculture Direct Install

<table>
<tr><td colspan="3">Program Name: Rural-HTR Agricultural DI</td></tr>
<tr><td colspan="3">Program ID: SCR-AGR-G2

New / Existing: Existing

Expected Program Duration: 2028 - onwards</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Equity</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

Third-Party Solicited</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)
Agricultural</td><td>Customer Group(s):

Agricultural</td></tr>
<tr><td colspan="2">Sector Challenges:

Low awareness and adoption of energy efficiency measures among underserved HTR and disadvantaged agricultural customers.</td><td>Sector Opportunities (Expected Outcome(s)):

Increased participation in EE program and adoption of EE measures; integration of EE as a standard business practice in agriculture communities.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The goal of the Rural-HTR Ag DI program is to deliver targeted no-cost energy efficiency support to agricultural customers in remote and underserved areas. It focuses on direct installation of energy efficiency equipment through targeted outreach to overcome barriers to participation. The program also promotes water-energy savings and aims to expand access to underutilized energy efficiency among underserved agricultural customers. The program offers no-cost direct installation of HVAC, lighting, water, heating, etc. measures.</td></tr>
<tr><td colspan="2">Known Equity Concerns in the Selected Markets (if applicable):

Limited understanding of and access to direct install opportunities for underserved agricultural customers; Limited access to capital to fund energy efficiency upgrades; Language and geographic barriers, and lack of vendor coverage.</td><td>Proposed Solutions to Equity Concerns (if applicable):

Provide tailored outreach and enhanced no-cost direct install incentives for underserved agriculture customers.</td></tr>
<tr><td colspan="2">Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

Direct Install, Marketing & Outreach</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)

Downstream – Direct Install</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: Rural-HTR Agricultural DI</th></tr>
<tr><td>Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)

Deemed</td><td>Program Total System Benefit (TSB) for 2028-2031: $7,180,211</td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $3,222,158

2029: $3,544,374

2030: $3,898,800

2031: $4,288,692</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

TRC: 0.48

PAC: 0.50</td></tr>
<tr><td>Anticipated directional and scale changes in budget for years 2032-2035:

Anticipated gradual budget increases year-over-year to account for increased market penetration.</td><td>Market Actors necessary for success:

Agriculture Customers, Contractors, Energy Engineers</td></tr>
<tr><td colspan="2">High-level description of delivery workforce including necessary scale and its risks:

Workforce requirements include vendor contractors, equipment suppliers, and logistics providers. Increased import costs, rising costs of equipment or materials, or disruptions in delivery infrastructure could pose a risk to program effectiveness.</td></tr>
<tr><td colspan="2">Near-term Program Output(s) (1-4 years):

Completed no-cost direct installations of EE measures for HTR, DAC, and rural agricultural customers; Participating Trade Allies stock & promote higher efficiency equipment to other stakeholders; Increased energy savings; create jobs; increased market adoption of uncommon EE technologies for this segment; customers understand the significant and costly energy in their Ag Systems through education; Remove cost and technical barriers to implement EE measures; customers understand energy and GHG impact of their equipment; increase trade ally enrollment incrementally per year.</td></tr>
<tr><td colspan="2">Long Term Outcome (5-10 years):

Environmental and non-energy benefits achieved; energy savings persist; develop new equipment efficiency standards at the State & Federal level; EE technologies and processes become standard practice in this Customer Segment; greater equity in access to efficiency benefits across rural and hard-to-reach agricultural communities; increased market penetration of higher efficiency equipment; Measurable reduction in kW, kWh, Therm Usage across entire segment; Ag EE technologies become standard.</td></tr>
<tr><td colspan="2">Does this program interact with other programs in this PA portfolio? If so, describe:

Yes, this PA offers two other programs in the agricultural sector (Agricultural Project Delivery Program and Agricultural Retrofit), and two related programs, one in the finance sector (Rural-HTR Agriculture Finance Assistance Program) and one in the Cross-Cutting sector (Agriculture Workforce, Education and Training</td></tr>
</table>

Program Name: Rural-HTR Agricultural DI	
Program). All five programs are designed to complement each other and coordinate on providing holistic services for agricultural customers	
Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Examples could include homes electrified, WE&T trainings held, etc.) Customer enrollment; Increased pipeline; Program savings contribution to market share; Job Creation; Capacity & Expertise; Customized Services; Educational Materials; Customer Satisfaction; Customers enrolled and projects completed in Disadvantaged Communities; Regional Environmental Benefits. Increased demand for energy-efficient products or services among SoCalREN targeted groups. Quantitative Targets (annualized first year and lifecycle): Gas savings gross; Gas savings net; Electric Savings gross; Electric savings net; Electric demand savings gross; Electric demand savings net.	
Does this program utilize Integrated Demand Side Management (IDSM)? EE/DR, Multi-DER IDSM, other or none Multi-DER IDSM	**Link to Existing Implementation Plan, if existing:** N/A - draft

B. Commercial Sector

1. Commercial Resiliency for High Fire Threat Designated Communities

<table>
<tr><th colspan="3">Program Name: Commercial Resiliency for High Fire Threat Designated Communities</th></tr>
<tr><td colspan="3">Program ID: SCR-COM-E6

New / Existing: New

Expected Program Duration: 2028 - 2035</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Resource Acquisition</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

REN</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector:

Commercial</td><td>Customer Group(s):

Small and Medium Hard-to-Reach Businesses</td></tr>
<tr><td colspan="2">Sector Challenges:

• Limited access to capital for energy upgrades and resiliency measures.
• Infrastructure vulnerability to wildfire and extreme weather events.
• Workforce capacity constraints
• Regulatory and planning misalignment</td><td>Sector Opportunities (Expected Outcome(s)):

• Provide technical assistance and incentives to support energy efficiency upgrades.
• Pair energy efficiency with resilience measures such as envelope hardening, HVAC filtration, and integrated distributed energy resources (“I-DER”).
• Commercial businesses receive support to mitigate future wildfire impacts while reducing utility cost burden.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

This program serves small and medium commercial businesses located in High Fire Threat designated areas or those who have recently experienced wildfire. The program provides energy efficiency and resilience upgrades. Through direct installation, technical assistance, and on-bill financing, it reduces energy costs, enhances indoor air quality, and strengthens building durability to wildfire and extreme weather-related disruptions such as public safety power shutoffs (PSPS). The program supports an equitable economic response to wildfire and related disruptions.</td></tr>
<tr><td colspan="2">Known Equity Concerns in the Selected Markets (if applicable):

• Disproportionate economic impact from wildfire and PSPS events.</td><td>Proposed Solutions to Equity Concerns (if applicable):

Explore remote, virtual options to engage with customers; select appropriate vendors ready to serve this region</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: Commercial Resiliency for High Fire Threat Designated Communities</th></tr>
<tr><td colspan="2">Limited access to financing and capital for EE and I-DER investments.
Lack of access to EE services.
Limited capacity and workforce.</td></tr>
<tr><td>Intervention Strategy:

Direct Install / IDSM \ Training</td><td>Delivery Type:

Downstream Direct Install.</td></tr>
<tr><td>Measurement and Verification Methods: (e.g., Equity Metrics</td><td>Program Total System Benefit (TSB) for 2028-2031:

$17,266,683</td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $1,500,000

2029: $3,250,000

2030: $3,500,000

2031: $4,000,000</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

TRC: 1.20

PAC: 1.27</td></tr>
<tr><td>Anticipated directional and scale changes in budget for years 2032-2035:

Anticipate an increase in budget for this program for the 2032-2035 period, depending on program performance.</td><td>Market Actors necessary for success:

Direct installation program implementers, local installing contractors, manufacturers, and distributors.</td></tr>
<tr><td colspan="2">High-level description of the delivery workforce, including the necessary scale and its risks:

The selected program implementer will be required to provide all labor to deliver the program. The workforce will require in-community engagement, program delivery, installation, and reporting teams. Compliance with HVAC and advanced lighting controls requirements per D.18-10-008 will be required. There are sufficient implementers and contractors to support the market.</td></tr>
<tr><td colspan="2">Near-term Program Output(s) (1-4 years):

Complete projects at commercial sites located within high fire threat designated communities during the program implementation period.</td></tr>
<tr><td colspan="2">Long Term Outcome (5-10 years):

Commercial participants in high fire threat designated communities are more economically and structurally resilient to wildfire and impacts from extreme weather events.</td></tr>
</table>

Program Name: Commercial Resiliency for High Fire Threat Designated Communities	
Does this program interact with other programs in this PA portfolio? If so, describe: This program interacts with the HTR Business Energy Advisor and Non-Trade WET programs by combining services to increase access and capacity in each community served.	
Program Metrics and Indicators (KPIs): • First year estimated utility cost savings • First year net claimable energy savings • Net total system benefit • Total Resource Cost is greater than 1.00. • Number of energy storage projects advanced. • Number of facility hardening recommendations made. • % of services to commercial participants in high fire threat designated communities who are also in low-income, low-access communities and/or DACs.	
Does this program utilize Integrated Demand Side Management (IDSM)? Yes	**Link to Existing Implementation Plan, if existing:** No IP Existing (Yet)

2. Hard-to-Reach Business Energy Advisor

<table>
<tr><td colspan="3">Program Name: Hard to Reach Business Energy Advisor</td></tr>
<tr><td colspan="3">Program ID: SCR-COM-E4

New / Existing: Existing

Expected Program Duration: 2028 - 2035</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Market Support</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

REN</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector:

Commercial</td><td>Customer Group(s):

Small and Medium Hard-to-Reach (“HTR”) Businesses</td></tr>
<tr><td colspan="2">Sector Challenges:

Hard to reach commercial customers:
Have minimal knowledge and experience with energy efficiency.
Deprioritize energy efficiency due to a lack of time and/or no cost support.
Lack capital or resources to participate in commercial programs
Lack trust due to a history of marginalization.</td><td>Sector Opportunities (Expected Outcome(s)):

Hard-to-reach commercial participants:
Gain increased access to the benefits of energy efficiency.
Realize utility cost savings through energy use reduction activities.
Deliver meaningful TSB to SoCalREN’s portfolio.
Benefit from exempt measure services</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The HTR Business Energy Advisor (BEA) program will provide a dedicated Energy Advisor as a single point of contact to coordinate delivery of services across programs while minimizing the complexity of engaging with energy efficiency program offerings. The program will prioritize customers in HTR, low-income low access (LILA), and DAC communities. The BEAs are hired by the communities being served and leverage existing relationships and community connections to encourage participation. The HTR BEA program will increase access to energy efficiency programs by supporting business owners in navigating program participation, energy use, and utility cost saving opportunities.</td></tr>
<tr><td colspan="2">Known Equity Concerns in the Selected Markets (if applicable):

HTR communities are often economically disadvantaged as compared to their non-HTR counterparts.</td><td>Proposed Solutions to Equity Concerns (if applicable):

Provide no cost support services to increase access to energy efficiency benefits.
Deliver services that focus on community based trust building.</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: Hard to Reach Business Energy Advisor</th></tr>
<tr><td>HTR customers do not have equitable access to EE resources.
HTR customers in LILA and DAC communities have been historically marginalized and require additional investments beyond equal.</td><td>Encourage program implementers to hire and train support staff located throughout SoCalREN’s territory.
Focus services to 100% HTR, %100 LILA with a priority on DAC communities.</td></tr>
<tr><td>Intervention Strategy:

Marketing and Outreach/Information, Technical Assistance</td><td>Delivery Type:

Market Support - Downstream</td></tr>
<tr><td>Measurement and Verification Methods: (e.g.,

Market Support Metrics</td><td>Program Total System Benefit (TSB) for 2028-2031:

0.00</td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $1,577,831

2029: $1,735,615

2030: $1,909,170

2031: $2,100,094</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

TRC: 0.00

PAC: 0.00</td></tr>
<tr><td>Anticipated directional and scale changes in budget for years 2032-2035:

Anticipate the budget to incrementally increase to keep pace with the increased costs of implementation over time.</td><td>Market Actors necessary for success:

Program implementers, in-community BEAs, in-community non-profits and mission aligned organizations, local government.</td></tr>
<tr><td colspan="2">High-level description of the delivery workforce, including the necessary scale and its risks:

The selected program implementer will be required to provide all labor to deliver the program. There are sufficient implementers and contractors to support the market.</td></tr>
<tr><td colspan="2">Near-term Program Output(s) (1-4 years):

The HTR BEA program will support businesses in navigating their energy use journey with more participation in energy efficiency programs.</td></tr>
<tr><td colspan="2">Long Term Outcome (5-10 years):

Significant investment is made in HTR, LILA, and DAC communities, aligned with the CPUC’s Environmental Justice goals 2.1, 2.3, 2.5 and 7.1, 7.2 and 7.3 to increase investments that benefit ESJ communities while promoting high-road career paths and economic opportunity.</td></tr>
</table>

Program Name: Hard to Reach Business Energy Advisor	
Does this program interact with other programs in this PA portfolio? If so, describe: This program interacts with the HTR Business Energy Advisor program by combining services to increase access and capacity in each community served.	
Program Metrics and Indicators (KPIs): • Number of HTR businesses referred to commercial sector programs. • Percent of businesses served referred to commercial sector programs. • Number of businesses receiving energy coaching services. • Number of projects receiving program management support • Number of businesses served in LILA communities • Number of businesses served in DAC communities.	
Does this program utilize Integrated Demand Side Management (IDSM)? Yes	**Link to Existing Implementation Plan, if existing:** LINK

3. Hard-to-Reach Commercial Direct Installation

<table>
<tr><td colspan="3">Program Name: Hard to Reach Commercial Direct Installation</td></tr>
<tr><td colspan="3">Program ID: SCR-COM-E5

New / Existing: Existing

Expected Program Duration: 2028 - 2035</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Equity</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

REN</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector:

Commercial</td><td>Customer Group(s):

Small and Medium HTR Businesses</td></tr>
<tr><td colspan="2">Sector Challenges:

Hard to reach commercial customers:
Have minimal knowledge and experience with energy efficiency
Deprioritize energy efficiency due to a lack of time and/or no cost support.
Lack capital or resources to participate in commercial programs
Lack trust due to a history of marginalization.</td><td>Sector Opportunities (Expected Outcome(s)):

Hard-to-reach commercial participants:
Gain increased access to the benefits of energy efficiency.
Realize utility cost savings through energy use reduction activities.
Deliver meaningful TSB to SoCalREN’s portfolio.
Benefit from exempt measure services.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The SoCalREN HTR Commercial Direct Install program maximizes the impact for those customers who need it the most. 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 prioritize customer cost savings by offering measures through a direct install delivery that simplifies the process and supports energy and cost savings.</td></tr>
<tr><td colspan="2">Known Equity Concerns in the Selected Markets (if applicable):
HTR customers are spread over broad geographic regions.
Customers do not have equitable access to EE resources.</td><td>Proposed Solutions to Equity Concerns (if applicable):
Encourage program implementers to hire and train support staff located throughout SoCalREN’s territory.
Focus services to 100% HTR with a priority on low-income/low access (LILA) and DAC communities.</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: Hard to Reach Commercial Direct Installation</th></tr>
<tr><td>HTR communities are often economically disadvantaged as compared to their non-HTR counterparts.</td><td>Provide no-cost direct installation services that prioritize utility cost savings.</td></tr>
<tr><td>Intervention Strategy:

Direct Install</td><td>Delivery Type:

Downstream – Direct Install</td></tr>
<tr><td>Measurement and Verification Methods: (e.g.,

Deemed</td><td>Program Total System Benefit (TSB) for 2028-2031:

$26,002,128.99</td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $7,000,000

2029: $7,700,000

2030: $8,470,000

2031: $9,317,000</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

TRC: 0.86

PAC: 0.86</td></tr>
<tr><td>Anticipated directional and scale changes in budget for years 2032-2035:

Anticipate an increase in budget for this program for the 2032-2035 period, dependent on program performance.</td><td>Market Actors necessary for success:

Direct installation program implementers, local installing contractors, manufacturers, and distributors.</td></tr>
<tr><td colspan="2">High-level description of the delivery workforce, including the necessary scale and its risks:

The selected program implementer will be required to provide all labor to deliver the program. The workforce will require in-community engagement, program delivery, installation, and reporting teams. Compliance with HVAC and advanced lighting controls requirements per D.18-10-008 will be required. There are sufficient implementers and contractors to support the market.</td></tr>
<tr><td colspan="2">Near-term Program Output(s) (1-4 years):

Complete projects at hard-to-reach commercial sites during the program implementation period.</td></tr>
<tr><td colspan="2">Long Term Outcome (5-10 years):

Support hard-to-reach commercial sites’ transition to meet CARB’s expected zero emissions appliance standards.</td></tr>
<tr><td colspan="2">Does this program interact with other programs in this PA portfolio? If so, describe:

This program interacts with the HTR Business Energy Advisor program by combining services to increase access and capacity in each community served.</td></tr>
</table>

Program Name: Hard to Reach Commercial Direct Installation	
Program Metrics and Indicators (KPIs): • 1st year estimated utility cost savings • 1st year net claimable energy savings • Net total system benefit • Businesses engaged • Applications submitted and reviewed • Applications approved • Signed participation agreements • Projects installed	
Does this program utilize Integrated Demand Side Management (IDSM)? Yes	**Link to Existing Implementation Plan, if existing:** LINK

C. Cross-Cutting Community-Based Sector

1. Community-Based Design Collaborative (CBDC)

<table>
<tr><td colspan="3">Program Name: Community-based Design Collaborative (CBDC or Collaborative)</td></tr>
<tr><td colspan="3">Program ID: SCR-CBDC-01

New / Existing: New

Expected Program Duration: 2026-2031</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Market Support</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

REN (Third-Party Implementer)</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector:

Cross-cutting Community Based</td><td>Customer Group(s):

Residents, students, community members at-large</td></tr>
<tr><td colspan="2">Sector Challenges:

Traditional EE programs and offerings have often lacked widespread uptake and have not properly addressed local community energy gaps in the past. Moreover, local trusted implementers with regional knowledge have lacked an adequate channel to propose customized initiatives that would generate more impactful outcomes.</td><td>Sector Opportunities (Expected Outcome(s)):

This effort focuses on engaging communities in designing their initiatives, giving them a direct role in shaping EE programs. Through the Collaborative, Community-based organizations (CBOs) work alongside their communities to develop customized initiatives and employ tailored marketing and outreach strategies that build trust, increase participation, and strengthen long-term understanding and acceptance of future EE programs.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The CBDC program, also known as the Collaborative, was designed by SoCalREN as directed by the California Public Utilities Commission (CPUC) to empower community leaders to take an active role in shaping and recommending processes for developing, testing, and funding community-designed programs. It provides a streamlined way for innovative ideas to be incubated, refined, and connected with the necessary partners and resources.

Through this effort, the Collaborative offers a simplified application process and facilitator support in completion for submitting and advancing new strategies that serve the unique and diverse needs of local and hard-to-reach (HTR) communities across the SoCalREN service territory. By fostering innovation and supporting both resource and non-resource initiatives aligned with SoCalREN’s core values, the</td></tr>
</table>

<table>
<tr><td colspan="2">Collaborative creates a platform where community-driven solutions can be developed, evaluated, and potentially scaled to benefit multiple regions.</td></tr>
<tr><td>Known Equity Concerns in the Selected Markets (if applicable):

EE programs are often a one size fits all approach and are not designed to address the unique needs of smaller, HTR, regional communities.</td><td>Proposed Solutions to Equity Concerns (if applicable):

Program customization designed by local community-based organizations (CBOs) with regional knowledge will increase participation and trust in current programs and offerings and provide outlets for the development of new ones.</td></tr>
<tr><td>Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

Technical assistance, Marketing and Outreach/Information, Training, Facilitation, with additional services to be added as initiatives are approved</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)

N/A</td></tr>
<tr><td>Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)

The CBDC program, or Collaborative, is a non-resource program. As such, M&V for the program focuses on program performance metrics for services offered in alignment with CPUC and state goals.</td><td>Program Total System Benefit (TSB) for 2028-2031:

N/A</td></tr>
</table>

Annual Budgets for 2028-2031: **2028:** $1,459,798 **2029:** $1,503,592 **2030:** $1,548,700 **2031:** $1,595,161	**Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:** N/A
Anticipated directional and scale changes in budget for years 2032-2035: Budget to gradually increase year-over-year to account for increased market penetration (TBD).	**Market Actors necessary for success:** Community Based Organizations, Community Stakeholders

High-level description of delivery workforce including necessary scale and its risks:

Program implementer and subcontractors to facilitate the Collaborative and support initiatives. Program implementer and subcontractors will work together to develop and launch CBDC initiatives based on identified gaps and needs. Technical assistance will be provided, as needed, to prepare initiative proposals and support launch. Some initiatives are stand-alone efforts, while others are paired with existing energy programs but all are evaluated for opportunity to scale out, serve as potential new programs, and complement existing SoCalREN offerings. Potential risks include reduced capacity or misaligned funding for initiative implementation.

Near-term Program Output(s) (1-4 years):

CBOs will submit initiative applications, with support from the facilitator. All applications will be reviewed by SoCalREN for funding eligibility and against criteria established by the Collaborative.

CBOs are anticipated to submit 5 initiative applications per year. Based on 20 applications submitted during a four year timespan, new initiatives will be evaluated with 15 expected to launch with customized offerings serving under-resourced communities.

Long Term Outcome (5-10 years):

Increased trust built in underserved and hard-to-reach communities; achieve successful EE savings; improve uptake of energy programs by continued proposal of new initiatives and scaling of successful ones in additional regions.

Does this program interact with other programs in this PA portfolio? If so, describe:

Yes, SCR-PUBL-B1, and others TBD.

Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Examples could include homes electrified, WE&T trainings held, etc.)

Initiative applications submitted, initiatives approved as customized offerings, EJ communities served, Initiatives scaled with additional metrics to be determined as Collaborative initiatives are approved.

Initiatives focused on education and outreach involving workshops, community education, demonstrations, tabling, curriculum development, and general outreach will have metrics such as number of workshops, presentations, or sessions delivered and number of engagement touchpoints. Initiatives focused on direct support and upgrades involving the distribution of energy-efficient devices, home-level support activities, or direct installs will have metrics such as number and type of devices or equipment distributed (e.g., air purifiers, smart strips, portable AC units) and number of households engaged. Initiatives focused on workforce development involving training, skill-building, youth engagement in career pathways, or hands-on workforce preparedness will have metrics such as number of participants enrolled in training or workforce activities and number of hours of instruction delivered

Does this program utilize Integrated Demand Side Management (IDSM)? To be determined, based on collaborative initiatives that are approved.	**Link to Existing Implementation Plan, if existing:** TBD, under development

2. Regional Partner Initiatives

Program Name: Regional Partner (RPAR) Initiatives		
Program ID: SCR-CBD-03 **New / Existing:** *Existing* **Expected Program Duration:** *2024-2031*		
Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards) *Market Support*	**Program Implementer Type:** (IOU Core, Third-Party Solicited, REN, CCA) *REN (Third-Party Implementer)*	**Third-Party Program Implementer (applicable to IOUs only):** *N/A*

Applicable Sector: Cross-Cutting Community Based	**Customer Group(s):** Cities, Counties, Tribes, K-12 School Districts, Community Colleges, Public Universities, Water and Wastewater districts, Special Districts, Federal and State Agencies
Sector Challenges: Traditional EE programs and offerings have often lacked widespread uptake in the past and local, trusted implementers with regional knowledge have lacked an adequate channel to propose customized initiatives that would generate better outcomes.	**Sector Opportunities (Expected Outcome(s)):** Regional Partners develop customized or enhanced initiatives and apply different approaches in marketing and outreach to increase participation and build trust with local communities which will further drive a better understanding and acceptance of future EE programs.

<table>
<tr><td colspan="2">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The objective of the Regional Partner Initiative is to provide a streamlined application process and an outlet for innovative strategies to serve agencies represented among the regions served by participating SoCalREN regional partner subcontractors. Regional Partner Initiatives are established to better address the diverse needs of public agencies in the SoCalREN service territory by leveraging regional partners to test new and innovative intervention strategies that can then be scaled as appropriate to other regions. SoCalREN offers a streamlined approach for regional partners to submit initiative ideas for consideration through a simplified application process alongside support to develop ideas and properly categorize them. Applications are evaluated as submitted. Resource and non-resource strategies that align with the SoCalREN core values are both considered.</td></tr>
<tr><td>Known Equity Concerns in the Selected Markets (if applicable):

EE programs are often a one size fits all approach for the public sector and are not designed to meet the unique needs of regional communities.</td><td>Proposed Solutions to Equity Concerns (if applicable):

Program customization designed by trusted implementers with regional knowledge will increase participation and trust in programs and offerings.</td></tr>
<tr><td>Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

Technical assistance, Marketing and Outreach/Information Training, with additional services to be added as initiatives are approved</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)

N/A</td></tr>
<tr><td>Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)

The Regional Partner Initiatives program is a non-resource program. As such, M&V for the program focuses on program performance metrics for services offered in alignment with CPUC and state goals.</td><td>Program Total System Benefit (TSB) for 2028-2031:

N/A</td></tr>
<tr><td>Annual Budgets for 2028-2031 (TBD):

2028: $599,409

2029: $617,391

2030: $635,912</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

N/A</td></tr>
</table>

2031: $654,990	
Anticipated directional and scale changes in budget for years 2032-2035: Budget to gradually increase year-over-year to account for increased market penetration (TBD).	**Market Actors necessary for success:** Regional Partners, Public Agencies, Community Based Organizations, Community Stakeholders
High-level description of delivery workforce including necessary scale and its risks: Program implementer and subcontractors will work together to develop and launch Regional Partner initiatives based on identified gaps and needs. Technical assistance will be provided, as needed, to prepare initiative proposals and support launch. Some initiatives are stand-alone efforts, while others are paired with existing energy programs, but all are evaluated for opportunity to scale out, serve as potential new programs, and complement existing SoCalREN offerings. Potential risks include reduced capacity or unaligned funding for initiative implementation.	
Near-term Program Output(s) (1-4 years): Regional partners are anticipated to submit 5 initiative applications per year. Based on 20 applications submitted during a four year timespan, new initiatives will be evaluated with 15 expected to launch with customized offerings serving under-resourced communities.	
Long Term Outcome (5-10 years): Increased trust built in underserved public agencies and communities; achieve successful EE savings; improve uptake of energy programs among served special populations.	
Does this program interact with other programs in this PA portfolio? If so, describe: Yes, SCR-PUBL-B1, and others TBD.	
Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Examples could include homes electrified, WE&T trainings held, etc.) Initiative applications submitted, initiatives approved as customized offerings, EJ communities served, Initiatives scaled with additional metrics to be determined as Regional Partner initiatives are approved.	
Does this program utilize Integrated Demand Side Management (IDSM)? EE and Multi-DER IDSM	**Link to Existing Implementation Plan, if existing:** https://cedars.cpuc.ca.gov/programs/SCR-PUBL-B7/details/

3. Tribal Community Resiliency Program (TCRP)

<table>
<tr><td colspan="3">Program Name: Tribal Community Resiliency Program (TCRP)</td></tr>
<tr><td colspan="3">Program ID: SCR-CBD-02

New / Existing: New

Expected Program Duration: 2026-2031</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Equity</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

REN (Third-Party Implementer)</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector:

Cross-Cutting Community Based</td><td>Customer Group(s):

Tribes</td></tr>
<tr><td colspan="2">Sector Challenges:

Tribal communities face unique challenges when leading EE and decarbonization efforts. Cultural sensitivities and a historic distrust of government programs can create barriers to engagement. Some Tribal governments may have limited technical expertise, resources, or staff capacity to fully plan, implement, and manage energy initiatives, making it difficult to access available opportunities. A lack of capital for investment and aging infrastructure, such as older buildings and utility systems, can further hinder progress.</td><td>Sector Opportunities (Expected Outcome(s)):

Tribal communities can lead the design of their own energy initiatives by developing plans that expand access to EE programs, lower energy costs, and move toward clean, sustainable energy solutions. With continued support from technical advisors and industry experts, including engineers, these efforts can be effectively implemented and sustained. By advancing community resilience across Tribal lands, Tribes can demonstrate leadership in EE and share best practices and lessons learned to inspire and guide others.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The Tribal Community Resiliency Program (TCRP) will empower Tribes and Tribal organizations in SoCalREN’s service territory to design and lead their own energy initiatives that advance sustainability, resilience, and economic growth. Through community-driven planning and tailored, no-cost technical support, Tribes can develop projects that reflect their priorities and strengthen their capacity to manage energy challenges.

Initiatives will be evaluated based on their alignment with Tribal goals and their potential to promote sustainable energy practices. Approved projects will receive customized assistance, funding opportunities, and expert guidance from SoCalREN and its partners.</td></tr>
</table>

<table>
<tr><td colspan="2">Working alongside SoCalREN's portfolio of programs, this initiative will ensure coordination and access to a full suite of technical services. Together, these efforts will help Tribal communities shape a resilient and self-determined energy future.</td></tr>
<tr><td>Known Equity Concerns in the Selected Markets (if applicable):

Tribal communities have historically been overlooked and excluded from many EE programs. Years of limited outreach and investment have contributed to a deep mistrust of public sector initiatives among Tribal governments, resulting in missed opportunities to obtain critical funding and support.</td><td>Proposed Solutions to Equity Concerns (if applicable):

The TCRP aims to advance equity by supporting and developing community-led energy initiatives. By empowering Tribal governments to design and deliver their own energy efficiency programs, the initiative helps remove barriers created by historical underinvestment. Building trust is central to this effort, through partnerships with respected Tribal leaders, the program ensures that every action is culturally grounded, collaborative, and responsive to community needs.</td></tr>
<tr><td>Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

Technical assistance, Marketing and Outreach/Information, Training, Facilitation, with additional services to be added as initiatives are approved</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)

N/A.</td></tr>
<tr><td>Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)

The TCRP is a non-resource program. As such, M&V for the program focuses on program performance metrics for services offered in alignment with CPUC and state goals.</td><td>Program Total System Benefit (TSB) for 2028-2031:

N/A</td></tr>
<tr><td>Annual Budgets for 2028-2031 (TBD):

2028: $835,407

2029: $918,948

2030: $1,010,840

2031: $1,111,927</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

N/A</td></tr>
</table>

Anticipated directional and scale changes in budget for years 2032-2035: Budget to gradually increase year-over-year to account for increased market penetration (TBD).	**Market Actors necessary for success:** Tribes, CBOs with trusted Tribal relationships, Community Stakeholders

High-level description of delivery workforce including necessary scale and its risks:

Program implementers and subcontractors to develop and launch the TCRP. No known risks.

Program implementer and subcontractors to facilitate the TCRP and support initiatives. Program implementer and subcontractors will work together to develop and launch TCRP initiatives based on identified gaps and needs. Technical assistance will be provided, as needed, to prepare initiative proposals and support launch. Some initiatives are stand-alone efforts, while others are paired with existing energy programs but all are evaluated for opportunity to scale out, serve as potential new programs, and complement existing SoCalREN offerings. Potential risks include reduced capacity or misaligned funding for initiative implementation.

Near-term Program Output(s) (1-4 years):

Based on submitted applications, new initiatives are evaluated, and eligible ones are launched with customized offerings and dedicated SoCalREN support for Tribes. SoCalREN anticipates launching 2–3 initiatives in the first year, with additional growth in subsequent years.

Long Term Outcome (5-10 years):

As Tribes gain experience designing, implementing, and managing their own energy initiatives, they build greater self-reliance and long-term sustainability. This can lead to a wide range of projects that reduce energy costs, create new clean-energy revenue, and improve resilience to climate impacts and emergencies. These efforts also expand Tribal access to energy-efficiency resources, strengthen SoCalREN Tribal partnerships, and support the development of locally driven initiatives that align with CPUC funding requirements.

Does this program interact with other programs in this PA portfolio? If so, describe:

Yes, SCR-PUBL-B1, and others TBD

Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Examples could include homes electrified, WE&T trainings held, etc.)

Initiative applications submitted, initiatives approved as customized offerings, number of Tribes engaged, number of Tribes participating in programs, number of Tribes that submit incentive applications, with additional metrics to be determined as Tribal initiatives are approved.

Proposed metrics include:

- Number of participating Tribes
- Number of meetings completed per Tribe
- Number and type of initiatives proposed
- Initiative categories

<table>
<tr><td colspan="2">

- Energy or non-energy impacts identified
- Community engagement activities conducted
- Stipends and support services provided
- Implementation pathway selected

</td></tr>
<tr><td>Does this program utilize Integrated Demand Side Management (IDSM)?

To be determined as Tribal initiatives are approved.</td><td>Link to Existing Implementation Plan, if existing:

TBD, under development</td></tr>
</table>

D. Cross-Cutting Finance Sector

1. Revolving Loan Fund Program

<table>
<tr><th colspan="3">Program Name: Revolving Loan Fund Program</th></tr>
<tr><td colspan="3">Program ID: SCR-FIN-C1

New / Existing: Existing

Expected Program Duration: 2028 - onwards</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Equity</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

REN (Third-Party Implementer)</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)

Cross-Cutting (Finance-Public)</td><td>Customer Group(s):

Cities, Counties, Tribes, School Districts, Community Colleges, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencies</td></tr>
<tr><td colspan="2">Sector Challenges:

Underserved and hard-to-reach public agencies face multiple barriers to funding EE projects. Barriers include lengthy budget approval processes, limited access to upfront capital to implement EE initiatives, and difficulty accessing financing programs.</td><td>Sector Opportunities (Expected Outcome(s)):

The program’s EE financing expands public sector participation in EE initiatives and accelerates project implementation - empowering agencies to contribute meaningfully to the State's long-term climate goals.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The Revolving Loan Fund, publicly known as the Revolving Savings Fund, is a cross-cutting finance program designed to support energy upgrades at facilities owned by underserved and hard-to-reach public agencies. The program offers 0% interest, up-front financing for EE projects, which can be utilized as standalone financing on a 5-year repayment horizon or serve as bridge financing while agencies wait for internal budget allocations or post-installation financing from utility on-bill financing programs.</td></tr>
<tr><td colspan="2">Known Equity Concerns in the Selected Markets (if applicable):

Public agencies serving underserved and hard-to-reach communities have limited funding to implement energy efficiency projects, leading to infrastructure inequalities. Rising utility costs can also be financially burdensome for under resourced public agencies, but implementing EE strategies is</td><td>Proposed Solutions to Equity Concerns (if applicable):

The program unlocks access to critical energy improvements for public agencies that have historically been excluded from traditional financing models. RLF offers a simplified loan resource to overcome budgetary barriers, providing 0% interest, low-risk financing that removes the upfront capital barrier. The program enables SoCalREN public</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: Revolving Loan Fund Program</th></tr>
<tr><td>cost-prohibitive due to the required up-front capital investment.</td><td>agencies serving underserved and hard-to-reach communities to act now to implement EE projects, reap bill savings benefits, and reinvest those dollars into critical community services. This approach strengthens local infrastructure and equity.</td></tr>
<tr><td>Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

Up-front financing at 0% interest</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)

Downstream</td></tr>
<tr><td>Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)

Other; each loan application is assessed based on forecasted energy savings and the agency’s ability to repay the loan within a 5-year term.</td><td>Program Total System Benefit (TSB) for 2028-2031:

N/A</td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $638,841

2029: $702,725

2030: $772,995

2031: $850,297</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

N/A</td></tr>
<tr><td>Anticipated directional and scale changes in budget for years 2032-2035:

Budget to gradually increase each year to accommodate delivery of program to an increasing number of customers.</td><td>Market Actors necessary for success:

This financing is made possible through seed funding from non-ratepayer American Recovery and Reinvestment Act (ARRA) funds granted to LA County by the California Energy Commission. Additional Market Actors are Public Agencies; Implementors, and Qualified EE contractors (e.g., Trade Allies).</td></tr>
<tr><td colspan="2">High-level description of delivery workforce including necessary scale and its risks:

As a loan program for EE projects, the program relies on the availability of contractors in the market to install EE measures. There is minimal risk that contractor availability will pose a threat to the program’s success.</td></tr>
<tr><td colspan="2">Near-term Program Output(s) (1-4 years):

Build a pipeline of agencies and projects; commit and disburse funds to drive EE projects.</td></tr>
</table>

Program Name: Revolving Loan Fund Program	
Long Term Outcome (5-10 years): Increased adoption of EE measures within public sector facilities and increased EE implementation by underserved and hard-to-reach public agencies. Public agencies return to the RLF to finance a pipeline of projects, integrating EE as standard practice in municipal facility maintenance.	
Does this program interact with other programs in this PA portfolio? If so, describe: Yes, this program interacts with other programs in this PA portfolio. Both the Project Delivery Program (SCR-PUBL-B1) and the Distributed Energy Resources Disadvantaged Communities Program (SCR-PUBL-B2) provide services to develop EE projects that may take advantage of the Revolving Loan Fund. Further, projects leveraging the Revolving Loan Fund may layer the financing with incentives from any of SoCalREN's public sector incentive programs.	
Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Examples could include homes electrified, WE&T trainings held, etc.) Metrics and indicators: Number of touch-points where the RSF Program is presented; Number of Project Proposals delivered; Number of RSF loan applications; Number of agency-approved loans; Energy savings supported by program financing (kWh, kW, therms, GHGs); Comparison between market-rate capital vs. capital accessed via EE programs (e.g., interest rate, monthly payment).	
Does this program utilize Integrated Demand Side Management (IDSM)? None.	**Link to Existing Implementation Plan, if existing:** https://cedars.cpuc.ca.gov/documents/download/3353/mainchange_summary%7Cmain%7Credline)/

2. Rural-HTR Agriculture Finance Assistance Program

<table>
<tr><td colspan="3">Program Name: Rural-HTR Agriculture Finance Assistance Program</td></tr>
<tr><td colspan="3">Program ID: SCR-FIN-C3

New / Existing: Existing

Expected Program Duration: 2028 - onwards</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Market Support</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

Third-Party Solicited</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)
Cross-cutting

Finance</td><td>Customer Group(s):

Agricultural</td></tr>
<tr><td colspan="2">Sector Challenges:

Cost barriers exist for underserved agricultural customers to implement energy efficiency upgrades.</td><td>Sector Opportunities (Expected Outcome(s)):

Increased utilization of financing opportunities among underserved agriculture customers to support adoption of EE measures.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The goal of the Rural-HTR Agriculture Finance Assistance Program is to support disadvantaged, rural, and underserved agricultural customers by facilitating access to cost-effective energy efficiency solutions through targeted outreach, technical support, and streamlined financing opportunities. The program helps customers access funding and financing to implement projects that deliver measurable electricity and gas savings, driving environmental benefits across the region.</td></tr>
<tr><td colspan="2">Known Equity Concerns in the Selected Markets (if applicable):

Underserved, rural, and small-scale agricultural customers face barriers to incentive access, including access to capital for energy-saving projects.</td><td>Proposed Solutions to Equity Concerns (if applicable):

Provide guidance and technical support for agricultural sector customers to identify and access financing options for energy efficiency projects.</td></tr>
<tr><td colspan="2">Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

Finance</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)

Downstream</td></tr>
</table>

Program Name: Rural-HTR Agriculture Finance Assistance Program	
Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other) N/A	**Program Total System Benefit (TSB) for 2028-2031:** N/A
Annual Budgets for 2028-2031: **2028:** $605,218 **2029:** $665,739 **2030:** $732,311 **2031:** $805,545	**Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:** N/A
Anticipated directional and scale changes in budget for years 2032-2035: Anticipated gradual budget increases year-over-year to account for increased market penetration.	**Market Actors necessary for success:** Agriculture Customers, Contractors, Energy Engineers
High-level description of delivery workforce including necessary scale and its risks: Workforce requirements include vendor contractors, equipment suppliers, and logistics providers, and organizations that originate or administer capital. Risks include rising equipment or materials costs, disruptions in delivery or capital availability that could pose a risk to program effectiveness.	
Near-term Program Output(s) (1-4 years): Increased customer awareness of financing options for energy efficiency projects. Customers receive technical assistance to identify appropriate financing pathways and prepare loan or funding applications. Growth in the number and value of loans secured by agricultural customers for EE upgrades. Reduced capital-access barriers through clearer guidance, referral pathways, and streamlined financing processes. Expanded lender networks serving underserved agricultural communities. Incremental increases in project installation rates are driven by newly accessible capital.	
Long Term Outcome (5-10 years): Underserved agricultural customers routinely leverage financing mechanisms to complete efficiency projects. Sustained reduction in capital barriers as financing participation becomes standard in the agricultural market. Increased use of energy-efficient technologies enabled by accessible capital and ongoing lender engagement. Persistent energy and GHG reductions supported by continued investment in equipment and system upgrades. Strengthened financial partnerships that expand tailored lending products for rural and underserved agricultural customers.	
Does this program interact with other programs in this PA portfolio? If so, describe: This PA offers three related programs in the agricultural sector (Agricultural Project Delivery Program, Agricultural Retrofit, and Rural-HTR Agricultural DI), and one in the Cross-Cutting sector (Agriculture	

Program Name: Rural-HTR Agriculture Finance Assistance Program	
Workforce, Education and Training Program). All five programs are designed to complement each other and coordinate on providing holistic services for agricultural customers.	
Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Examples could include homes electrified, WE&T trainings held, etc.) Customer enrollment; Increased pipeline; Capacity & Expertise; Educational Materials; Customer Satisfaction. Total Covered Projects, Count of projects where financing application submitted; Count of projects where a loan was used; Cumulative value of loans in dollars; Total $ leveraged; Source of external (non-IOU) financing – Private; # projects where external (non-IOU) financing was leveraged; Total $ leveraged; Source of external (non-IOU) financing – State.	
Does this program utilize Integrated Demand Side Management (IDSM)? None	**Link to Existing Implementation Plan, if existing:** N/A - draft

E. Cross-Cutting WE&T Sector

1. Architecture Construction Engineering & Sustainability (ACES) Pathway Program

<table>
<tr><th colspan="3">Program Name: Architecture Construction Engineering & Sustainability (ACES) Pathway Program</th></tr>
<tr><td colspan="3">Program ID: SCR-WET-D2

New / Existing: Existing

Expected Program Duration: 2028 - 2031</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Equity</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

Third-Party Implementer</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)
Residential

Workforce Education & Training</td><td>Customer Group(s):

• K-12 students from Title I and underserved schools

• Community college students in ACES or clean-energy fields

• Students from disadvantaged, hard-to-reach, or resource-constrained communities</td></tr>
<tr><td colspan="2">Sector Challenges:

Limited access to ACES-aligned courses, instructors, and funding across the SoCalREN region restricts student participation, particularly in rural and disadvantaged areas. Gaps in curriculum alignment and technology access also limit certificate and internship readiness.</td><td>Sector Opportunities (Expected Outcome(s)):

Increase access to ACES pathways by partnering with schools, colleges, and industry mentors to align curriculum, expand hybrid learning, and offer stipend internships that connect students to clean-energy and ACES careers.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The Architecture Construction Engineering & Sustainability (ACES) Pathway Program provides in-school youth with early access to career pathways in architecture, construction, engineering, Sustainability and clean energy fields. With a focus on sustainability and energy efficiency, ACES leverages partnerships with Title I schools, community colleges, public works, and industry leaders to offer tuition-free college courses, hands-on training, and paid internships. Serving communities across the thirteen counties of the SoCalREN territory, the program works to empower underserved youth to gain technical skills, industry-recognized certifications, and meaningful connections that open doors to purpose-driven, well-paid careers in the ACES fields.</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: Architecture Construction Engineering & Sustainability (ACES) Pathway Program</th></tr>
<tr><td>Known Equity Concerns in the Selected Markets (if applicable):
1. Limited ACES-aligned course offerings at high school and community college levels.
2. Lack of instructors and funding in rural and disadvantaged areas.
3. Barriers to participation due to technology, transportation, and material costs.</td><td>Proposed Solutions to Equity Concerns (if applicable):
1. Partner with schools and colleges to align curriculum and create certificate pathways.
2. Expand hybrid and virtual options and leverage Regional Coordinators to support outreach and enrollment in rural, low-income and historically underserved communities.
3. Offer stipend internships and mentorship to improve access and equity in ACES fields.</td></tr>
<tr><td>Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

Education and Training, Mentorship, Marketing & Outreach</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)

Downstream</td></tr>
<tr><td>Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)

Other</td><td>Program Total System Benefit (TSB) for 2028-2031:

N/A</td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $534,868

2029: $588,354

2030: $647,188

2031: $711,909</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

N/A</td></tr>
<tr><td>Anticipated directional and scale changes in budget for years 2032-2035:

Expansion of budget and geographic reach to serve additional schools and to integrate The Hub virtual career platform for student placement and data tracking.</td><td>Market Actors necessary for success:

K-12 Schools & Districts, Community Colleges, Industry Partners, Workforce Agencies</td></tr>
<tr><td colspan="2">High-level description of delivery workforce including necessary scale and its risks:

Program delivery is led by the ACES team in collaboration with school districts, community colleges, and industry partners who provide instruction, mentorship, and internship opportunities. Implementation depends</td></tr>
</table>

Program Name: Architecture Construction Engineering & Sustainability (ACES) Pathway Program

on maintaining strong coordination with educational partners across the SoCalREN territory. Key risks include limited staffing capacity concentrated in Los Angeles County, the need to expand Regional Coordinators coverage in underserved areas, varying levels of school district engagement, and technology or resource gaps that can affect participation in remote and hybrid learning environments.

Near-term Program Output(s) (1-4 years):

Engage and equip students from Title I and disadvantaged schools through dual-enrollment courses, hands-on workshops, and paid internships that promote career exploration in ACE and sustainability fields. Strengthen and expand partnerships with schools, community colleges, and industry partners to align curricula and provide over 300 students with direct exposure to real-world sustainability and clean energy careers.

Further, enhance the Sustainability Pathway by integrating core coursework that extends beyond traditional architecture, construction, and engineering disciplines to prepare students for a broader range of sustainability-focused professions. Continue to develop and refine the Go-Engineer SolidWorks Internship, aligning it with the ACES curriculum to deepen students' technical training and industry readiness.

Long Term Outcome (5-10 years):

Establish a sustained pipeline of students from Title I and disadvantaged schools who are inspired and prepared to pursue postsecondary education and training in Architecture, Construction, Engineering and Sustainability (ACES) fields. Institutionalize the Sustainability Pathway as a core component of regional workforce development, connecting academic coursework to a broader spectrum of high-road, sustainability-focused careers.

Increase the number of students earning industry-recognized certifications, completing internships, and expressing interest in continuing studies or careers in ACES-related fields by 50%, fostering a more diverse, equitable, and future-ready clean-energy workforce pipeline.

Does this program interact with other programs in this PA portfolio? If so, describe:

N/A

Program Metrics and Indicators (KPIs):

Total Unique Participants Served, Number of Dual Enrollment Courses participants are taking, Number of Skills Training Certificates Earned, Number of Professional Certifications Earned, Number of DAC/HTR Schools Served, Number of Employment Partners, Number of Industry and Grant Partners, Number of College Partners, Number of Internship Placements, Total Service Touchpoints (Non-Unique), Number of Participants Enrolled In Dual Enrollment Courses, Total College Credits Earned Through Dual Enrollment, K8 ACES Curriculum Participants, Number of Participants Engaged Exclusively In Industry Events or Field Trips, Number of School Partner Orientations, Number of School Site Support Hours, Number of Outreach Events Attended by ACES, Number of Events Hosted or Co-Hosted by ACES, Number of Active Counties, Number of Counties In Progress, Number of College Partners In Progress, Number of Skills Training Certificates In Progress, Number of Professional Certifications In Progress, Number of Unique Participants Who Earned Skills Certificates, Number of Unique Participants Who Earned Professional Certifications, Number of Participants Pursuing STEM and EE Major In College, Number of Unique Courses Jointly Developed by ACES/CC, Number of Hours of Student Support, Number of Students Receiving Academic/College Career Counseling Support, Number of Supportive Sessions Provided to Students In

Program Name: Architecture Construction Engineering & Sustainability (ACES) Pathway Program	
Academic and College Counseling, Number of Intern Hours Worked, Internship Wages Earned, Internship Completion Rate, Monetary Contributions Leveraged (Hard Funds), In-Kind Contributions Leveraged (Estimated Value), Assessed Value of the Partnership by Partners - Surveys	
Does this program utilize Integrated Demand Side Management (IDSM)? Not applicable – non-resource equity education initiative.	**Link to Existing Implementation Plan, if existing:** Link to CEDARS IP

2. Ag-WE&T Workforce Education & Training Program

<table>
<tr><td colspan="3">Program Name: Ag-WE&T Workforce Education & Training Program</td></tr>
<tr><td colspan="3">Program ID: SCR-WET-D5

New / Existing: Existing

Expected Program Duration: 2028 - 2031</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Market Support (Equity-Aligned)</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

Third-Party Implementer</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)
Residential

Agricultural (Workforce Education & Training)</td><td>Customer Group(s):

• Small and diverse contractors currently working in the Rural Hard to Reach Direct Install & Agriculture Retrofit space in support of On-Farm and Facility Upgrades in California Dairies, Greenhouses, and Crop Operations

• Small and diverse contractors looking to expand into the Rural Hard to Reach Direct Install & Agriculture Retrofit space in support of On-Farm and Facility Upgrades in California Dairies, Greenhouses, and Crop Operations</td></tr>
<tr><td colspan="2">Sector Challenges:

Rural and underserved agricultural communities have limited access to training and business support. Small and diverse Ag contractors face barriers to capital, procurement, and market entry, while distance, seasonal work, and language needs limit participation in workforce development. Additionally, the Bioscience Training required for agricultural energy efficiency projects creates barriers for non-agricultural contractors who may not meet the Ag-specific qualifications upon initial introduction to these projects.</td><td>Sector Opportunities (Expected Outcome(s)):

Expanded access to training and business support will increase the number of qualified agricultural contractors by helping participants meet Ag-specific certification requirement, strengthen local capacity to participate in EE project opportunities, and improve inclusion of small and diverse Ag businesses in the sector.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The Ag WE&T program provides Agriculture-based Direct Install and Retrofit contractors with training, education, including the required Bioscience Training for agricultural direct install and retrofit projects. The</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: Ag-WE&T Workforce Education & Training Program</th></tr>
<tr><td colspan="2">program also provides one-on-one technical assistance in support of rural and underserved farming communities. The program builds business readiness and workforce skills needed to participate in agricultural energy efficiency project opportunities on farms, facilities, dairies, greenhouses and crop operations in California. Core strategies include workshops, multi-session training academies, Bioscience training, outreach through local agricultural organizations, and personalized business development support. Expected outcomes include increased contractor and workforce capacity, improved readiness to qualify for and perform energy efficiency work, and greater participation of small and underrepresented Ag businesses within the agricultural clean energy economy.</td></tr>
<tr><td>Known Equity Concerns in the Selected Markets (if applicable):

Rural and underserved agricultural communities often lack accessible training pathways, business development resources, and capital access. Small and diverse Ag contractors also face challenges with licensing, bonding, and procurement participation.</td><td>Proposed Solutions to Equity Concerns (if applicable):

Provide accessible training formats, bilingual delivery, business capacity-building assistance, and coordinated referral pathways that support small and diverse Ag contractors in entering and growing within the agricultural energy efficiency market.</td></tr>
<tr><td>Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

Training, Technical Assistance, Marketing & Outreach/Information</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)

Downstream</td></tr>
<tr><td>Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)

Other</td><td>Program Total System Benefit (TSB) for 2028-2031:

N/A</td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $291,746

2029: $320,921

2030: $353,012

2031: $388,314</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

N/A</td></tr>
<tr><td>Anticipated directional and scale changes in budget for years 2032-2035:

Budget growth to expand Ag-focused training into additional rural regions and agricultural sectors, integrate participation through the WE&T Opportunity Hub for centralized access and</td><td>Market Actors necessary for success:

Agricultural contractors and producers, local farm bureaus and agricultural associations, community-based organizations and workforce development boards serving rural communities, community colleges and agricultural training institutions, small</td></tr>
</table>

Program Name: Ag-WE&T Workforce Education & Training Program	
matching, and strengthen outreach and business capacity-building support for small and diverse Ag contractors.	business support and capital access partners, and alignment with SoCalREN's Ag sector programs and the WE&T Opportunity Hub for centralized platform support.
High-level description of delivery workforce including necessary scale and its risks: The program relies on trainers, technical assistance providers, and regional outreach partners who can effectively engage agricultural contractors. To reach rural and underserved areas, the delivery workforce must operate across dispersed geographies and maintain strong local relationships. Risks include varying levels of business readiness among contractors, and challenges sustaining engagement in regions with seasonal work patterns.	
Near-term Program Output(s) (1-4 years): Deliver agriculture-focused training, workshops, and one-on-one technical assistance that strengthen the skills and business capacity of small and diverse contractors in two learning tracks. One track to up-skill current contractors already knowledgeable about agricultural direct install and retrofit projects. The second track will be for contractors looking to grow and expand their business portfolio into the agricultural sector EE projects.	
Long Term Outcome (5-10 years): A larger and more capable agricultural contractor network able to successfully pursue, perform, and sustain participation in energy efficiency opportunities across rural and underserved communities.	
Does this program interact with other programs in this PA portfolio? If so, describe: Yes. Ag WE&T directly supports participation in the SoCalREN agricultural portfolio, including: Ag Project Development Program (Ag-PDP), Ag Retrofit Program, Rural Hard-to-Reach Ag Direct Install (Rural HTR Ag DI), the HUB	
Program Metrics and Indicators (KPIs): Total Unique Participants Served, Total Training Engagement, Number of Training Completion Certificates Earned, Number of Contractors Receiving Technical Assistance/Coaching, Total Technical Assistance/Coaching Hours, Number of Education & Training Courses (Workshops, Academies, Training Courses)	
Does this program utilize Integrated Demand Side Management (IDSM)? Not applicable – non-resource equity education initiative.	**Link to Existing Implementation Plan, if existing:** Link to CEDARS IP

3. Construction Project Management Pathway

<table>
<tr><td colspan="3">Program Name: Construction Project Management Pathway</td></tr>
<tr><td colspan="3">Program ID: SCR-WET-D7

New / Existing: New

Expected Program Duration: 2028 - 2031</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Equity</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

Third-Party Implementer</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)
Residential

Workforce Education & Training</td><td>Customer Group(s):
ACES Alumni
GPC Participants
Employees of ECA Contractors
Foremen, Superintendents, other In-Field Workers</td></tr>
<tr><td colspan="2">Sector Challenges:

The increase in construction projects throughout Southern California has created a demand for more professionals and industry experts who can manage clean energy and infrastructure projects. Also, additional pathways are necessary for individuals entering the construction industry and those aging-out of field work, who are not yet ready for retirement.</td><td>Sector Opportunities (Expected Outcome(s)):

There are two sector opportunities for this proposed program. First, as In-the-Field workers are aging out, but not ready for retirement, there is an opportunity for them to transition to a second career utilizing their knowledge and expertise to deliver the types of projects they have built for years from start to finish. The second opportunity is for individuals who do not have a desire to start their construction careers in “office.” By starting a career as a Construction Project Manager, this program would allow ACES Alumni and GPC Participants with an additional pathway, immediately out of high school or college.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The Construction Project Management Pathway Program provides training through community colleges to support ACES Alumni, GPC Participants, employees of ECA Contractors, and Foremen, Superintendents, other In-Field Workers aging out the field. The program focuses on building all aspects project management knowledge and skills to improve contractor capacity, enhance competitiveness for larger projects, and support professional advancement. Participants gain foundational knowledge in planning, scheduling, budgeting, site</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: Construction Project Management Pathway</th></tr>
<tr><td colspan="2">coordination, subcontractor management, safety, quality control, and compliance, preparing them for project management positions in the construction and clean-energy sectors.</td></tr>
<tr><td>Known Equity Concerns in the Selected Markets (if applicable):
1. Limited institutions offering Construction Project management curriculum and certification.
2. Limited access to affordable project management training.
3. Few professional advancement pathways for employees of small and diverse contractors.
4. Few professional transition pathways for Foreman, Superintendents, and workers aging-out of in-the-field work.
5. Barriers such as time, cost, and location of training programs.
6. Industry demand for an increase in Construction Project Managers entering the industry.
7. Limited diverse representation in project management positions within the construction sector.</td><td>Proposed Solutions to Equity Concerns (if applicable):
1. Accessible project management training.
2. Low-cost or sponsored tuition options.
3. Clear advancement pathways into Construction Project Management roles.
4. Workforce agency partnerships for support.
5. Priority access to the program for small and diverse contractors.
6. Meet the industry demand for an increase of Construction Project Managers entering the industry.</td></tr>
<tr><td>Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

Education and Training, Mentorship, Marketing & Outreach</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)

Downstream</td></tr>
<tr><td>Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)

Other</td><td>Program Total System Benefit (TSB) for 2028-2031:

N/A</td></tr>
</table>

Program Name: Construction Project Management Pathway	
Annual Budgets for 2028-2031: **2028:** $466,379 **2029:** $480,370 **2030:** $494,781 **2031:** $509,625	**Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:** N/A
Anticipated directional and scale changes in budget for years 2032-2035: N/A	**Market Actors necessary for success:** Community colleges and training providers, ECA contractors and employer partners, Workforce boards and AJCCs, Industry associations and trade partners, and Professional certification organizations.
High-level description of delivery workforce including necessary scale and its risks: Scaling the program may require strong partnerships with multiple community colleges / training providers. It may also require additional instructors, expanded regional access, and coordination with partners. Key risks include limited training capacity, limited staff capacity, and participant barriers such as time, transportation, or course and equipment costs.	
Near-term Program Output(s) (1-4 years): Launch Construction Project Management training cohorts through community college partners. Increase enrollment and course completion for ACES alumni, GPC participants, employees of ECA Contractors and transitioning Foreman, Superintendent, and workers. Strengthen and build new partnerships with community colleges offering the curriculum, employers, and industry associations to support training delivery of this pathway. The program will also include an SCR cross-sector mentorship and partnering component that connects participants with industry professionals to support real-world application and peer learning. Training may be delivered through a combination of internally developed modules and outsourced instruction from external partners, depending on specialization and certifications needs.	
Long Term Outcome (5-10 years): Strengthen the regional construction industry workforce by increasing the number of qualified Construction Project Managers supporting clean-energy construction projects. Improve contractor capacity to compete for larger projects, increase business growth, increase the number of diverse professionals entering the construction sector. Expand program to the entire SoCalREN territory through new partnerships with community colleges offering the curriculum, employers and industry associations to support training delivery and advancement pathways into supervisory roles.	
Does this program interact with other programs in this PA portfolio? If so, describe: N/A	
Program Metrics and Indicators (KPIs):	

Program Name: Construction Project Management Pathway	
Number of Unique Participants Enrolled, Number of Participants Completing Project Management Training, Number of Employer and College Partnerships	
Does this program utilize Integrated Demand Side Management (IDSM)? Not applicable – non-resource equity education initiative.	**Link to Existing Implementation Plan, if existing:** N/A

4. E-Contractor Academy & Training Program

<table>
<tr><td colspan="3">Program Name: E-Contractor Academy & Training Program</td></tr>
<tr><td colspan="3">Program ID: SCR-WET-D6

New / Existing: Existing

Expected Program Duration: 2028 - 2031</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Market Support</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

Third-Party Implementer</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)
Residential

Workforce Education & Training</td><td>Customer Group(s):
• Small, Minority, Women, Disabled Veteran Business Enterprise (SMWDVBE)
• Licensed and emerging contractors seeking energy-efficiency or public-sector opportunities
• Contractors in underserved or rural markets who lack access to bid pipelines</td></tr>
<tr><td colspan="2">Sector Challenges:

Limited staff capacity, funding, and access to project pipelines restrict small and diverse contractors from pursuing energy-efficiency and public-sector opportunities throughout the SCR territory.</td><td>Sector Opportunities (Expected Outcome(s)):

Increase SMWDVBE contractor capacity through technical assistance, professional training, and access to bid opportunities in clean-energy and green-building projects.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The E-Contractor Academy & Training (ECA) Program is one of three flagship initiatives of the Southern California Regional Energy Network (SoCalREN) Workforce Education & Training Sector. The ECA is a prominent program within the contractor development space and aims to create economic impact and business growth for contractors and program participants.

Contractors and program participants engage in multi-week academies and specialized workshops covering key industry topics (e.g., Bonding 101, Access to Capital, Labor Compliance, ASPE Introduction to Construction Estimating I). In addition, contractors receive individualized support to strengthen their business operations, including but not limited to assistance with certifications, marketing strategies, bid and Request</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: E-Contractor Academy & Training Program</th></tr>
<tr><td colspan="2">for Proposal (RFP) preparation, access to project opportunities, and technical guidance for energy efficiency retrofits in collaboration with other SoCalREN Programs.</td></tr>
<tr><td>Known Equity Concerns in the Selected Markets (if applicable):
1. Limited access to public sector contracting and energy-efficiency project opportunities.
2. Barriers faced by small, minority, women, and disabled veteran contractors in meeting bonding, insurance, and certification requirements.
3. Lack of affordable, industry-recognized training and technical support for business growth.</td><td>Proposed Solutions to Equity Concerns (if applicable):
1. Provide targeted technical assistance and coaching to support SMWDVBE contractors’ business development and bid readiness.
2. Offer specialized workshops and certifications focused on energy-efficiency and green-building projects.
3. Expand access to procurement pipelines through partnerships with local agencies, chambers, and The Hub.</td></tr>
<tr><td>Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)
Technical Assistance, Training, Marketing & Outreach</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)
Downstream</td></tr>
<tr><td>Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)
Other</td><td>Program Total System Benefit (TSB) for 2028-2031:
N/A</td></tr>
<tr><td>Annual Budgets for 2028-2031:
2028: $486,243
2029: $534,868
2030: $588,353
2031: $647,190</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:
N/A</td></tr>
</table>

Program Name: E-Contractor Academy & Training Program	
Anticipated directional and scale changes in budget for years 2032-2035: Expansion of budget and regional reach to engage more small, minority, women, and disabled veteran contractors across the SoCalREN territory. Integration of The Hub virtual platform to support contractor outreach, bid opportunities, data tracking, and labor/workforce.	**Market Actors necessary for success:** Chambers of Commerce, Local Agencies, Workforce Development Boards, Industry Associations, Technical Assistance Providers, Multi-Craft Core Curriculum (MC3) providers, Trade Schools and Academies.
High-level description of delivery workforce including necessary scale and its risks: Program delivery is led by ECA staff in partnership with industry experts who deliver content for trainings and workshops. One-on-one support is provided by ECA staff. Expansion will require additional staffing and stronger partnerships. Risks include limited capacity, funding constraints, and contractor availability.	
Near-term Program Output(s) (1-4 years): Train and support small, minority, women, and disabled veteran contractors through workshops, academies, and one-on-one technical assistance. Expand access to bid opportunities via The Hub platform and strengthen partnerships with local agencies, industry associations, chambers to increase contractor participation and certifications.	
Long Term Outcome (5-10 years): Increase the number of small, minority, women, and disabled veteran contractors participating in public, residential, and commercial energy-efficiency projects by 50%. Expand regional contractor capacity to complete SoCalREN and other clean energy projects independently.	
Does this program interact with other programs in this PA portfolio? If so, describe: Yes. ECA (SCR-WET-D1) interacts with ACES (SCR-WET-D2), GPC (SCR-WET-D3), The Hub (SCR-WET-D4) to coordinate workforce training, contractor engagement, project pipeline development, and clean-energy market access across sectors.	
Program Metrics and Indicators (KPIs): Total Unique Participants Served, Total Training Engagement, Number of Training Completion Certificates Earned, Number of Contractors Receiving Technical Assistance/Coaching, Number of Coaching/Technical Assistance Hours, Number of Education & Training Courses (Workshops, Academies, Training Courses), Number of Business Enterprise Certifications Earned, Number of Technical Assistance/Coaching Sessions, Number of Contractors Referred to External Training, Number of Referrals to External Training, Percentage of Contractors Indicating Increased Soft Skills to Conduct EE Projects or knowledge of Energy Efficiency Topics, Number of E-CLAP Contractors Receiving Technical Assistance/Coaching, Number of E-CLAP Coaching/Technical Assistance Hours, Number of E-CLAP Licenses In Progress, Number of E-CLAP Licenses Earned, Number of Bids for EE Projects Submitted, Number of Bids for Non-EE projects Submitted, Number of Contractors/Participants Referred to Business Resources, Number of Referrals to Business Resources, Number of Contractors Referred to other SoCalREN Programs, Number of Referrals to	

Program Name: E-Contractor Academy & Training Program	
other SoCalREN Programs, Number of Outreach Events Attended, Number of Events Hosted or Co-hosted, Number of Counties Served	
Does this program utilize Integrated Demand Side Management (IDSM)? Not applicable – non-resource equity education initiative.	**Link to Existing Implementation Plan, if existing:** Link to CEDARS IP

5. Green Path Careers (GPC) Program

<table>
<tr><td colspan="3">Program Name: Green Path Careers (GPC) Program</td></tr>
<tr><td colspan="3">Program ID: SCR-WET-D3

New / Existing: Existing

Expected Program Duration: 2028 - 2031</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Equity</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

Third-Party Implementer</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)
Residential

Workforce Education & Training</td><td>Customer Group(s):
Opportunity Youth
Adults (ages 18+)
Justice Impacted
Homeless
Disadvantaged Communities</td></tr>
<tr><td colspan="2">Sector Challenges:

Participant retention continues to pose challenges, particularly due to limited funding for wraparound support services such as case management, re-engagement outreach, and individualized coaching. These constraints affect the program’s ability to maintain consistent contact and fully support participants through completion.</td><td>Sector Opportunities (Expected Outcome(s)):

Expand training opportunities by introducing additional pathways and certifications to strengthen participant career advancement, including:
NATE Certifications
HVAC BPI Career Pathway
Pre- Apprenticeships - Coordinate with local unions to develop a hybrid model for participants, allowing them to choose between fully online training or in-person training.
New pathway in construction in partnership with E-Contactor Academy</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The Green Path Careers (GPC) program, a flagship initiative of the Southern California Regional Energy Network (SoCalREN), provides invaluable opportunities for youth and adults, including Transition-Aged</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: Green Path Careers (GPC) Program</th></tr>
<tr><td colspan="2">Youth (TAY), justice-impacted individuals, low-income and disadvantaged adults, and those facing homelessness. By offering education, training, and work experience in the emerging Energy Efficiency (EE) sector, GPC empowers participants to build sustainable careers. This initiative is made possible through collaboration with SoCalREN, local workforce boards, and government departments of economic opportunity.

Serving 13 counties across Southern California, the GPC program is designed to address the barriers these individuals face when transitioning into the workforce while simultaneously supporting the growing demand for a skilled EE workforce. By mitigating challenges such as lack of access to certifications, supportive services, and career guidance, GPC equips participants with the tools needed to succeed. With a focus on education, practical experience, and targeted support, the program fosters meaningful career pathways in the energy sector, driving both individual and regional economic growth. A map is included to highlight the expansive reach of the program across the region.</td></tr>
<tr><td>Known Equity Concerns in the Selected Markets (if applicable):

Employer commitment is a concern due to securing consistent employer buy-in for placements, site visits, and long-term hiring remains a hurdle.</td><td>Proposed Solutions to Equity Concerns (if applicable):

- Paid Work Experience/internship
- On the job training
- Employer round tables
- Pre- Apprenticeship / Apprenticeship program</td></tr>
<tr><td>Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

Technical Assistance, Training, Marketing & Outreach</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)

Downstream</td></tr>
<tr><td>Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)

Other</td><td>Program Total System Benefit (TSB) for 2028-2031:

N/A</td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $875,238

2029: $962,762

2030: $1,059,035

2031: $1,164,942</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

N/A</td></tr>
</table>

Program Name: Green Path Careers (GPC) Program	
Anticipated directional and scale changes in budget for years 2032-2035: Anticipate a moderate budget increase to expand workforce partnerships, internships, and job placement efforts across additional regions. Additional funding will support integration of The Hub as a centralized platform for career opportunities, employer engagement, and participant data tracking. Growth will depend on program outcomes and statewide workforce priorities.	**Market Actors necessary for success:** Community Colleges, Training Institutions, Workforce Development Agencies, Industry Employers & Contractors, and Community-Based organizations, Building Trades
High-level description of delivery workforce including necessary scale and its risks: Workforce delivery includes program managers who provide case management support, training, job readiness, and placement support with the help of industry partners. Program scale depends on maintaining active employer engagement and consistent partner participation. Risks includes limited staffing capacity, reduced funding, or shifts in partner availability that could affect program reach and job placement outcomes.	
Near-term Program Output(s) (1-4 years): Support individuals in achieving measurable skills gain through technical training, hands-on pre-apprenticeship programs, and connections to apprenticeship opportunities.	
Long Term Outcome (5-10 years): Ensure participants acquire the skills, certifications, and career readiness support needed to successfully enter the workforce and achieve sustained growth through continuous upskilling, mentorship, and advancement opportunities within their chosen industries.	
Does this program interact with other programs in this PA portfolio? If so, describe: N/A	
Program Metrics and Indicators (KPIs): Number of Unique Participants Enrolled in EE Training, Number of Unique Participants Receiving Career Plans (IEP), Number of EE Job or Intern Placements, Number of Training Completion Certificates Earned, Number of Industry Certifications Earned, Number of Case Management Support Hours, Total Service Touchpoints (Non-Unique), Number of Active Participants Receiving Case Management Support (Green/EE Jobs), Number of Non-Active Participants Receiving Case Management Support (Green/EE Jobs), Number of Case Management Sessions Delivered, Number of Non-EE Job or Intern Placements, Number of Unique Participants Referred to External/DER training, Number of Sustainability Training Certificates Earned, Number of Participants Enrolled In Sustainability Training Certificate, Number of G-PRO Training Certificates Earned, Number of Participants Enrolled In a GPRO Training Certificate, Number of OSHA Training Certificates Earned, Number of Participants Enrolled In an OSHA Training Certificate, Number of Unique Participants Who Earned Training Certificate, Number of EPA 608 Certifications Earned, Number of Participants Enrolled In an EPA 608 Certification, Number of HERS Rater Certifications Earned, Number of Participants Enrolled In a HERS Rater Certification, Number of Unique Participants Who Earned Industry	

Program Name: Green Path Careers (GPC) Program	
Certification, Number of Certifications Through Partnerships In Progress, Number of External Training Partnerships, Number of Employer Partnerships, Number of Other Partnerships, Number of Outreach Events Attended, Number of Events Hosted or Co-Hosted by GPC, Number of Counties.	
Does this program utilize Integrated Demand Side Management (IDSM)? Not applicable – non-resource equity education initiative.	**Link to Existing Implementation Plan, if existing:** Link to CEDARS IP

6. Workforce Education & Training Opportunity Hub

<table>
<tr><td colspan="3">Program Name: Workforce Education & Training Opportunity Hub</td></tr>
<tr><td colspan="3">Program ID: SCR-WET-D4

New / Existing: Existing

Expected Program Duration: 2028 - 2031</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Market Support</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

Third-Party Implementer</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)
Residential

Workforce Education & Training</td><td>Customer Group(s):
Small and minority contractors
Disadvantaged workers
Hard-to-reach (HTR)
Disadvantaged communities (DAC) residents
Youth
Businesses</td></tr>
<tr><td colspan="2">Sector Challenges:

Growing labor shortage in the EE construction field, fragmented and misaligned regional EE industry workforce and business ecosystem.</td><td>Sector Opportunities (Expected Outcome(s)):
Connect SoCalREN's small and minority contractors and disadvantaged workers to capacity-building resources and opportunities.
Provide BIPOC/DAC residents with skills, jobs, and business opportunities in green building/technologies.
Strengthen and align the regional EE industry workforce and business ecosystem.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The WE&T Opportunity Hub is a Market Support initiative and a one-stop web-platform intended to bridge gaps in the Workforce Education & Training (WE&T) sector. Its core customer targets are small and minority contractors and disadvantaged workers, specifically hard-to-reach (HTR) and residents in Disadvantaged</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: Workforce Education & Training Opportunity Hub</th></tr>
<tr><td colspan="2">Communities (DAC), including BIPOC residents. The program strategies employed involve leveraging a web-platform to provide high visibility and access to training, supportive services, capital, marketing, and project or job opportunities. The platform's three major offerings include a Resource Library, a Training Center (for specialized education), and a Marketplace/Opportunity Clearinghouse (for job postings, bids, and skills matching). The expected program outcome is to align the WE&T workforce regionally, strengthen the EE industry ecosystem, and prepare participants to enter the EE sector workforce pipeline.</td></tr>
<tr><td>Known Equity Concerns in the Selected Markets (if applicable):

Barriers for DAC businesses and residents to enter the Energy Efficiency sector, including: lack of support services (technology, transportation, clothing), limited access to capital, bonding, and insurance, and a fragmented workforce ecosystem.</td><td>Proposed Solutions to Equity Concerns (if applicable):

Access to support services from partners, help with capital, bonding, and insurance through partnerships with banks/CDFIs, ECC partnership alliance agreements to address barriers and maximize economic opportunity.</td></tr>
<tr><td>Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

Training, Marketing and Outreach/Information</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)

Downstream</td></tr>
<tr><td>Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)

Other</td><td>Program Total System Benefit (TSB) for 2028-2031:

N/A</td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $612,667

2029: $673,933

2030: $741,324

2031: $815,459</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

N/A</td></tr>
<tr><td>Anticipated directional and scale changes in budget for years 2032-2035:

Gradual budget growth to expand Hub platform functionality, increase user support capacity, and scale outreach to disadvantaged workers and small contractors across the region. Enhancements may include AI-supported matching tools, expanded resource libraries, increased training content, and</td><td>Market Actors necessary for success:

Regional workforce and business assistance organizations, industry, community, and institutional partners, employer partners, Agencies, Utilities, and Private sectors (for project opportunities).</td></tr>
</table>

Program Name: Workforce Education & Training Opportunity Hub	
deeper integration with regional workforce and business development partners.	
High-level description of delivery workforce including necessary scale and its risks: Hub team/staff provides one-on-one contact for participants. Workforce must provide continuous contact, marketing, outreach, and training sessions. Risk: Needs a strong infrastructure to train and continuously connect with trainees and contractors. Additionally, instability in available project work and market demand may affect participant placement and contractor engagement.	
Near-term Program Output(s) (1-4 years): Operate a centralized online platform that increases engagement among disadvantaged workers and small contractors, provides access to training and business resources, facilitates job and project matching, and delivers coordinated support services through regional partnerships.	
Long Term Outcome (5-10 years): A strengthened and more equitable regional energy efficiency workforce and small business ecosystem, with participants successfully entering and advancing within the EE sector. Future platform enhancements integrate automated needs assessment and compliance support tools.	
Does this program interact with other programs in this PA portfolio? If so, describe: Yes. The E-Contractor Academy (ECA – SCR-WET-D1) interacts with ACES (SCR-WET-D2) and GPC (SCR-WET-D3) to align training, contractor engagement, and workforce development pathways that support clean-energy project opportunities across the region.	
Program Metrics and Indicators (KPIs): Certifications Earned, Certificates Earned, Number of Contractors Matched to Opportunities, Number of Contracts Awarded to Hub Users, Number of Supportive Service Referrals Made, Number of Completed Projects by Hub Contractors, Average Time to First Opportunity Click, Number of Opportunities Listed, Trainings Started, Trainings Completed, Number of Hub Page Visits, Total Registered Users, Profile Completion Rate, Active Users (Monthly), Number of Opportunities Viewed, Number of Opportunity Redirects (External Clicks), Resource Downloads/Views, Returning Visitors, Bounce Rate, Traffic Sources, Average Session Duration.	
Does this program utilize Integrated Demand Side Management (IDSM)? Not applicable – non-resource equity education initiative.	**Link to Existing Implementation Plan, if existing:** Link to CEDARS IP

F. Public Sector

1. Energy Efficiency Public Agency Project Delivery Program

<table>
<tr><th colspan="3">Program Name: Energy Efficiency Public Agency Project Delivery Program</th></tr>
<tr><td colspan="3">Program ID: SCR-PUBL-B1

New / Existing: Existing

Expected Program Duration: 2028 - onwards</td></tr>
<tr><td>Portfolio Segment:

Market Support</td><td>Program Implementer Type:
(IOU Core, Third-Party Solicited, REN, CCA)

REN (Third-Party Implementer)</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector:

Public</td><td>Customer Group(s): Cities, Counties, Tribes, School Districts, Community Colleges, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencies</td></tr>
<tr><td colspan="2">Sector Challenges:

Public agencies face a range of challenges that hinder their ability to implement large-scale energy efficiency initiatives. These include limited in-house technical expertise and staffing, constrained financial resources (e.g., federal funding cuts, tariffs), and complex procurement and approval processes. Many public agencies also lack access to data and analytical tools required for informed decision-making. Despite public agencies being major energy consumers and influential community leaders, these barriers often prevent meaningful progress towards achieving local and state climate goals. The diversity of the public sector further adds complexity, as each agency has unique operational, financial, and technical needs that require tailored support and solutions.</td><td>Sector Opportunities (Expected Outcome(s)):

The PDP will help bridge gaps faced by the public sector by streamlining project implementation through sustained technical assistance and support in securing project funding; improving facility energy consumption management; implementing comprehensive retrofits; reinvesting energy cost savings back into the community; demonstrating energy leadership and best practices; and supporting the State's long-term climate and emissions reduction goals.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

PDP fills market gaps by providing public agencies with an integrated, objective, and comprehensive EE solution at no cost. Targeting underserved and hard-to-reach customers, PDP offers a holistic suite of services, including energy use analysis, audits, performance specifications, scope of work development, support with incentive and financing applications, financial analysis, procurement assistance, and construction management support.</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: Energy Efficiency Public Agency Project Delivery Program</th></tr>
<tr><td>Known Equity Concerns in the Selected Markets (if applicable):

Public agencies, particularly those serving underserved or hard-to-reach communities, oversee a wide range of facilities but often lack the staff capacity, technical expertise, and financial resources needed to identify and implement EE upgrades. Many public sector facilities are historic or smaller buildings that are not eligible for other EE programs and lack the infrastructure needed to transition easily to newer technologies. Public agencies are also frequently approached by private EE vendors and companies about EE products and services, which can create confusion and a lack of trust in the EE market.</td><td>Proposed Solutions to Equity Concerns (if applicable):

The program addresses equity gaps by providing comprehensive, no-cost support to all public sector customers – especially those serving underserved and hard-to-reach communities. Through a full suite of technical and project management services, the program empowers agencies to better manage their facilities, pursue EE upgrades, and access funding and incentives. As a trusted third party, SoCalREN provides unbiased assessments of EE opportunities and guides public agencies through the complex EE landscape.</td></tr>
<tr><td>Intervention Strategy: Technical Assistance</td><td>Delivery Type: Downstream</td></tr>
<tr><td>Measurement and Verification Methods:

PDP is a non-resource program that channels energy savings through existing resource programs. As such, M&V for the program focuses on tracking customer energy savings claimed by resource programs and program performance metrics for services offered in alignment with CPUC and state goals.</td><td>Program Total System Benefit (TSB) for 2028-2031:

N/A</td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $8,778,887

2029: $9,656,776

2030: $10,622,423

2031: $11,684,699</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

N/A</td></tr>
<tr><td>Anticipated directional and scale changes in budget for years 2032-2035:</td><td>Market Actors necessary for success:

Public agency stakeholders, utility partners and third-party program implementers.</td></tr>
<tr><td colspan="2">High-level description of delivery workforce including necessary scale and its risks:

PDP supports workforce development initiatives by measuring and reporting on job creation metrics. Supported installations must comply with the HVAC/Advanced Lighting Controls Program and CPUC</td></tr>
</table>

Program Name: Energy Efficiency Public Agency Project Delivery Program	
Workforce Standards as stipulated in D.18-10-008. Sufficient contractors are needed in the market to support EE installations.	
Near-term Program Output(s) (1-4 years): Increase public agency enrollment in EE programs, particularly in underserved and hard-to-reach areas (e.g., DACs), to deliver targeted project development services that help channel growing TSB into applicable resource programs. PDP also connects agencies to emerging EE technologies and complementary measures, enabling the rapid implementation of more comprehensive and impactful EE projects.	
Long Term Outcome (5-10 years): Program services extend to all eligible agencies across SoCalREN's extensive territory, embedding EE as a standard practice in public sector facilities management; PDP is a nationally recognized, replicable model for delivering measurable EE savings and advancing equity in the public sector.	
Does this program interact with other programs in this PA portfolio? If so, describe: Yes. PDP provides technical assistance and project management support to facilitate project entry into SoCalREN's portfolio of resource programs and also coordinates with other PA offerings, including upstream, midstream, direct install, and third-party programs, to maximize benefits and operational efficiency.	
Program Metrics and Indicators (KPIs): Metrics and Indicators: On-bill energy savings (kWh, kW, therms), agency enrollments, outreach activities completed, educational materials delivered, GHG reductions, projects delivered to underserved agency sites, customer satisfaction rating; number of agencies receiving EE support services (including count of underserved and hard-to-reach participants); number of agencies receiving energy use analysis & benchmarking support; number of construction jobs enabled through EE investments.	
Does this program utilize Integrated Demand Side Management (IDSM)? None.	**Link to Existing Implementation Plan, if existing:** *https://cedars.cpuc.ca.gov/documents/download/3377/mainchange_summary%7Cmain%7Credline)/*

2. Public Agency Distributed Energy Resources Disadvantaged Communities Program

<table>
<tr><td colspan="3">Program Name: Public Agency Distributed Energy Resources Disadvantaged Communities Program</td></tr>
<tr><td colspan="3">Program ID: SCR-PUBL-B2

New / Existing: Existing

Expected Program Duration: 2028 - onwards</td></tr>
<tr><td>Portfolio Segment:

Equity</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

REN (Third-Party Implementer)</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector:

Public</td><td>Customer Group(s): Cities, Counties, Tribes, School Districts, Community Colleges, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencies</td></tr>
<tr><td colspan="2">Sector Challenges: Limited staff, lack of technical expertise, limited access to data for informed decision making, funding challenges, complex procurement, and approval requirements.</td><td>Sector Opportunities (Expected Outcome(s)): Facility energy management; energy audits; comprehensive retrofits; reinvest energy cost savings in communities; support the State's long-term goals.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome): The Public Agency Distributed Energy Resources Disadvantaged Communities (DER DAC) Program includes distributed energy resources (DER) and sustainability strategies during project implementation and provides educational information and resources for integrating DERs into energy efficiency projects. The program is exclusively offered to underserved and/or hard-to-reach customers. Services include energy use analysis, audits, performance specifications, scope of work support, incentive and financing application support, financial analysis, procurement assistance, and construction management support for energy efficiency and DER projects.</td></tr>
<tr><td colspan="2">Known Equity Concerns in the Selected Markets (if applicable): Economic, health, and environmental burdens within underserved and hard-to-reach communities.</td><td>Proposed Solutions to Equity Concerns (if applicable): The program supports public agencies to integrate energy solutions to address health and safety barriers, while reducing GHG emissions in underserved and hard-to-reach communities.</td></tr>
<tr><td colspan="2">Intervention Strategy: Downstream integrated energy strategy support (technical assistance)</td><td>Delivery Type:

Downstream</td></tr>
<tr><td colspan="2">Measurement and Verification Methods:

DER DAC is a non-resource program that channels energy savings through existing resource programs. As such, M&V for the program focuses on tracking</td><td>Program Total System Benefit (TSB) for 2028-2031:

N/A</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: Public Agency Distributed Energy Resources Disadvantaged Communities Program</th></tr>
<tr><td>customer energy savings claimed by resource programs and program performance metrics for services offered in alignment with CPUC and state goals.</td><td></td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $1,573,262

2029: $1,730,588

2030: $1,903,641

2031: $2,094,011</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

N/A</td></tr>
<tr><td>Anticipated directional and scale changes in budget for years 2032-2035:

Budget to gradually increase year-over-year to account for increased market penetration.</td><td>Market Actors necessary for success:

Public agency stakeholders, utility partners and third-party program implementers.</td></tr>
<tr><td colspan="2">High-level description of delivery workforce including necessary scale and its risks:

The DER DAC Program supports workforce development initiatives by measuring and reporting on job creation metrics. Supported installations must comply with the HVAC/Advanced Lighting Controls Program and CPUC Workforce Standards as stipulated in D.18-10-008. Sufficient contractors are needed in the market to support EE and DER installations.</td></tr>
<tr><td colspan="2">Near-term Program Output(s) (1-4 years):

Increased underserved public agency enrollment in EE and DER offerings; Engage and educate agencies about DER and sustainability strategies; Identify strategies to help agencies implement deeper and more comprehensive EE and DER projects.</td></tr>
<tr><td colspan="2">Long Term Outcome (5-10 years):

Expand service delivery to all underserved eligible public agencies; Leverage supplemental funding to provide DER technical services to public agencies; Make EE and DER implementation a standard practice for public agencies.</td></tr>
<tr><td colspan="2">Does this program interact with other programs in this PA portfolio? If so, describe:

Yes, the DER DAC Program complements other program initiatives within this PA portfolio. The DER DAC Program delivers energy efficiency project management, educational resources, and subject matter expert guidance on DER and sustainability strategies – specifically for underserved and/or hard-to-reach public agency customers. This program also collaborates and coordinates with the other PA portfolio program offerings to channel EE projects into applicable resource programs.</td></tr>
<tr><td colspan="2">Program Metrics and Indicators (KPIs):</td></tr>
</table>

Program Name: Public Agency Distributed Energy Resources Disadvantaged Communities Program	
Metrics and indicators: Energy savings (kWh, kW, therms), GHG reductions, participating agencies receiving services (including count of underserved and hard-to-reach participants), outreach activities, education materials, customer satisfaction, project proposals, EE and DER technical services, DER education, job creation, count of underserved/HTR projects.	
Does this program utilize Integrated Demand Side Management (IDSM)? EE and Multi-DER IDSM	**Link to Existing Implementation Plan, if existing:** https://cedars.cpuc.ca.gov/documents/download/3387/mainchange_summary%7Cmain%7Credline)/

3. Energy Resiliency Action Plan (ERAP)

<table>
<tr><td colspan="3">Program Name: Energy Resiliency Action Plan</td></tr>
<tr><td colspan="3">Program ID: SCR-PUBL-B6

New / Existing: Existing

Expected Program Duration: 2028 - onwards</td></tr>
<tr><td>Portfolio Segment:

Market Support</td><td>Program Implementer Type:

REN (Third Party Implementer)</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector:

Public</td><td>Customer Group(s): Cities, Counties, Tribes, School Districts, Community Colleges, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencies</td></tr>
<tr><td colspan="2">Sector Challenges:

Many public agencies lack the technical expertise and have limited staff, data access, and resources to develop and implement comprehensive climate and energy plans or informed energy resilience strategies for project prioritization.</td><td>Sector Opportunities (Expected Outcome(s)):

Facility energy consumption management; comprehensive retrofits; community-scale energy and resilience plans; regional recognition of public agencies as climate leaders; support the State's long-term climate and emission reduction goals.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

ERAP educates and supports public agencies (prioritizing those that serve underserved or hard-to-reach communities) by helping them understand and identify energy efficiency and distributed energy resource projects. ERAP aims to strengthen critical community infrastructure and lay the groundwork for future resilience hubs. In addition, ERAP leverages data-driven insights and stakeholder feedback to guide energy resilience planning and project implementation, ensuring a community-integrated approach that reflects local needs and priorities.</td></tr>
<tr><td colspan="2">Known Equity Concerns in the Selected Markets (if applicable):

Public agencies manage diverse facility portfolios and often lack the resources to identify and plan for energy resilience upgrades. ERAP prioritizes underserved and hard-to-reach public agencies, where limited support may contribute to increased economic, health, social, and environmental vulnerabilities within their communities.</td><td>Proposed Solutions to Equity Concerns (if applicable):

ERAP provides a suite of services to support public agencies in their resilience planning efforts. The program provides facility portfolio analyses, customized community outreach materials, comprehensive facility energy audits, and a final ERAP report that summarizes all planning efforts to date, connects public agencies with funding and financing resources, and integrates projects into SoCalREN’s Public Agency Project Delivery Program (SCR-PUBL-B1) and Distributed Energy Resources</td></tr>
</table>

Program Name: Energy Resiliency Action Plan	
	Disadvantaged Communities Program (SCR-PUBL-B2) for continued project implementation support.
Intervention Strategy: Downstream integrated energy strategy support	**Delivery Type:** Downstream
Measurement and Verification Methods: The ERAP Program is a non-resource program that channels energy savings through existing resource programs. As such, M&V for the program focuses on customer energy savings claimed by resource programs and program performance metrics for services offered in alignment with CPUC and state goals.	**Program Total System Benefit (TSB) for 2028-2031:** N/A
Annual Budgets for 2028-2031: **2028:** $1,326,824 **2029:** $1,459,506 **2030:** $1,605,452 **2031:** $1,766,002	**Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:** N/A
Anticipated directional and scale changes in budget for years 2032-2035: Budget to gradually increase on an annual basis to allow for further program expansion into underserved and hard-to-reach communities.	**Market Actors necessary for success:** Utility partners, third-party program implementers, and public agency stakeholders
High-level description of delivery workforce including necessary scale and its risks: Sufficient contractors in the market to support the implementation of EE and DER energy project recommendations.	
Near-term Program Output(s) (1-4 years): Proactively engage and educate public agencies on energy resilience, community-based resilience planning, and the integration of distributed energy resources to strengthen local infrastructure; Provide public agencies with a pipeline of shovel-ready EE and DER project opportunities; Support agencies in adopting strategic, data-informed approaches to prioritize energy actions that reduce energy consumption, enhance reliability, and safeguard critical facilities and resilience hubs.	
Long Term Outcome (5-10 years):	

Program Name: Energy Resiliency Action Plan	
Expand service delivery to all eligible public agencies across SoCalREN's extensive territory, especially those that are serving underserved or hard-to-reach communities; Leverage supplemental non-ratepayer funding to provide DER technical support to public agencies; Institutionalize energy resilience planning and DER implementation as standard practice within public agencies' operations.	
Does this program interact with other programs in this PA portfolio? If so, describe: Yes, ERAP is designed to work in close coordination with other programs within this PA portfolio. ERAP provides energy resilience project planning, education, and subject matter expertise on DER and sustainability strategies to strengthen community resilience. Through strategic alignment with complementary programs within this PA portfolio, ERAP leverages agency onboarding efforts to identify new participants, streamline project implementation, and connect public agencies to relevant resource programs that help offset the cost of recommended energy projects. This braided approach ensures that public agencies benefit from a seamless support ecosystem, maximizing impact across planning, funding, and execution.	
Program Metrics and Indicators (KPIs): Metrics and Indicators: Number of participating agencies receiving services, outreach activities, stakeholders engaged, agencies provided with final ERAP reports, EE and DER technical services, and DER educational offerings.	
Does this program utilize Integrated Demand Side Management (IDSM)? EE and Multi-DER IDSM: integrated energy efficiency and DER audits and related technical assistance.	**Link to Existing Implementation Plan, if existing:** https://cedars.cpuc.ca.gov/documents/download/2546/mainchange_summary%7Cmain%7Credline)/

4. Public Sector Load Flexibility Program

<table>
<tr><th colspan="3">Program Name: Public Sector Load Flexibility Program</th></tr>
<tr><td colspan="3">Program ID: SCR-PUBL-B11

New / Existing: New

Expected Program Duration: 2028 - onwards</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Market Support</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

REN (Third-Party Implementer)</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector:

Public</td><td>Customer Group(s): Cities, Counties, Tribes, School Districts, Community Colleges, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencies</td></tr>
<tr><td colspan="2">Sector Challenges:

● Public agencies face competing priorities: delivering reliable community services under tight budgets and staffing, while also navigating increasing utility costs and progressing toward their climate goals
● Limited staffing and technical expertise to effectively operate flexible load technologies
● Budget constraints and long procurement cycles
● Insufficient internal knowledge about demand management, controls programming, and load flexibility
● Limited access to interval data and analytics tools
● Complexity of integrating different technologies, such as battery storage (BESS), heat pump water heaters (HPWH), thermal storage (TES), and EV chargers, with existing BMS systems and lack of knowledge of Virtual Power Plant (VPP) and DR program opportunities
● Hesitancy to adopt new operational strategies that require culture or process changes</td><td>Sector Opportunities (Expected Outcome(s)):

● Public facilities with significant peak demand (e.g., fire stations, dispatch centers, gyms, and healthcare facilities) offer significant load shifting potential
● These public facilities can achieve significant bill savings by permanently shifting key building loads, including water heating, HVAC, and EV charging, away from peak hours
● Agencies can reinvest utility cost savings into deeper energy upgrades or community services
● Public agencies can contribute to reduced reliance on gas peaker plants and the potential for rolling blackouts
● Through education, technical support, and incentives, more public agencies can participate in demand flexibility and VPP programs, increasing customer and ratepayer affordability and improving grid reliability by reducing demand during peak demand periods
● Provide sector-level evidence that load flexibility is practical, cost-effective, and</td></tr>
</table>

Program Name: Public Sector Load Flexibility Program	
● Fragmented funding sources due to the sunsetting of federal and state funding sources (e.g. IRA tax credits)	operationally achievable for public agencies, strengthening the need for continued investment in this market segment beyond early adopters.

Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

Public agencies are increasingly focused on reducing emissions, cutting utility costs, and strengthening community resilience. The Public Sector Load Flexibility Program enables public sector facilities to reduce energy costs and support grid stability through both event-based and permanent load shifting. The program will provide public agencies with comprehensive technical assistance to identify, evaluate, and implement permanent load shifting strategies that reduce daily peak energy use and improve grid resilience. The program will pilot technical assistance interventions to identify load shifting opportunities, such as conducting detailed energy consumption analysis, verifying of time-of-use (TOU) rates, benchmarking on-peak load patterns, and evaluating load flexibility options along with their associated costs and savings across facility operations and equipment.

Technical support may include identification of load flexible technologies such as heat pump water heaters (HPWHs), advanced thermostats/building management systems (BMS) scheduling, battery storage, thermal energy storage (TES), EV charging management, and vehicle-to-grid (V2G) readiness. The Public Sector Load Flexibility Program will provide incentives tied specifically to load shifting and associated avoided costs, with an initial focus on capturing the load shift benefits of heat pump water heaters. The program will not provide incentives to offset the capital costs of non-EE technologies.

Participants receive guidance on VPP readiness and ongoing operational strategies to ensure sustained grid-supportive performance. The program provides a curated list of available aggregators and VPP participation opportunities to help agencies capture long-term value from their load flexibility investments. The program will also help agencies identify and connect with suitable financing options to enable the timely adoption of the identified load-flexible technologies.

As a Market Support program, the Public Sector Load Flexibility Program aims to support a series of pilot and/or demonstration projects at public sector facilities featuring load-flexible technologies to develop case studies and best practices that advance a long-term market shift toward grid-interactive, efficient buildings. Expected outcomes include reduced on-peak energy consumption, increased adoption of grid-beneficial technologies, improved operational efficiency, and expanded participation of public agencies in demand response and VPP programs.

Known Equity Concerns in the Selected Markets (if applicable):	**Proposed Solutions to Equity Concerns (if applicable):**
Underserved agencies are resource-constrained and often lack dedicated facility staff or technical capacity to optimize their operation of load-flexible technologies, and have high staff turnover which makes it difficult to maintain institutional operational knowledge.	The program directly addresses equity concerns by prioritizing support for public agencies serving disadvantaged, underserved, and hard-to-reach communities. It provides full-service technical assistance and measure identification at no cost to participants, helping reduce the staffing, financial, and technical barriers that often prevent these

<table>
<tr><th colspan="2">Program Name: Public Sector Load Flexibility Program</th></tr>
<tr><td>Many underserved public buildings are older and face decades of disinvestment and deferred maintenance issues that limit the immediate deployment of flexible load technologies.

Agencies serving underserved communities often cannot risk operational disruptions to essential services and may see load flexibility as a potential risk to service delivery.</td><td>communities from participating in load flexibility initiatives.

The program will tailor services to the unique needs of each participating facility, ensuring that load shifting recommendations do not compromise the ability to deliver critical community services.

By enabling access to demand-management solutions, incentives, and VPP revenue opportunities, the program expands community resilience, reduces energy cost burden, and improves health and environmental outcomes in communities historically left behind in the clean energy transition.</td></tr>
<tr><td>Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

Downstream integrated energy strategy support (technical assistance); education, incentives</td><td>Delivery Type:

Downstream</td></tr>
<tr><td>Measurement and Verification Methods:

The Public Sector Load Flexibility Program will pilot M&V strategies to capture and verify permanent peak demand reductions by using custom load shapes that quantify the positive benefits of avoided energy use during peak hours and the negative benefits of added energy use during off-peak periods, thereby determining the net benefits of supported load shifting projects. The program will follow ongoing guidance from the California Public Utilities Commission (CPUC) regarding how to capture and claim permanent load shifting benefits and will adapt its M&V processes accordingly.</td><td>Program Total System Benefit (TSB) for 2028-2031:

TBD</td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $250,000

2029: $250,000

2030: $250,000

2031: $250,000</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

TBD</td></tr>
</table>

Program Name: Public Sector Load Flexibility Program

Anticipated directional and scale changes in budget for years 2032-2035:

Budget to gradually increase year-over-year to account for increased market penetration.

Market Actors necessary for success:

Public agency stakeholders, VPP and DR program providers, utility partners and third-party program implementers.

High-level description of delivery workforce including necessary scale and its risks:

The Public Sector Load Flexibility Program supports workforce development initiatives by building a network of contractors trained in load flexibility technologies as well as Virtual Power Plant (VPP) service providers. The program will measure and report on job creation metrics while ensuring all supported installations comply with the HVAC/Advanced Lighting Controls Program and CPUC Workforce Standards as stipulated in D.18-10-008.

Near-term Program Output(s) (1-4 years):

- Establishment and advancement of load-shifting impact M&V strategies
- Initial portfolio of successful demonstration sites producing real and permanent kW reduction
- Enrollment of diverse public agencies into VPP offerings
- Deployment of controls and operational strategies for batteries, HPWH, TES, and EV chargers

Long Term Outcome (5-10 years):

- Public agencies adopt permanent load-shifting as a standard operating practice
- Scaled deployment of load-flex controls across entire school districts, cities, and water agencies
- Integration with additional DER, DR, and electrification programs for holistic IDSM
- Public sector becomes a major contributor to peak reductions

Does this program interact with other programs in this PA portfolio? If so, describe:

Yes, the program is designed to operate as part of a coordinated, integrated public sector delivery model in SoCalREN's portfolio, coordinating with the Project Delivery Program (SCR-PUBL-B1), which provides EE project development support, and the Distributed Energy Resources Disadvantaged Communities Program (SCR-PUBL-B2), which provides EE and DER technical assistance to public facilities located in underserved communities.

This combination of programs ensures public agencies can pursue efficiency, DER integration, and load flexibility in a seamless manner across the full SoCalREN portfolio. The program also interacts with SoCalREN's Revolving Savings Fund (SCR-FIN-C1), which provides bridge financing to underserved public agencies to finance EE equipment upgrades or controls work required to participate in the Load Flexibility Program.

Program Name: Public Sector Load Flexibility Program	
Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Examples could include homes electrified, WE&T trainings held, etc.) Metrics and indicators include: TSB; kWh shifted out of peak hours; Number of participating public agencies (underserved and non-underserved); Number of projects by technology type (e.g. HPWH, BESS, TES, EV charging); Number of sites receiving technical assistance & commissioning support; Number of agencies educated on VPP program readiness; Number of case studies developed. This program will also report out on applicable Common Metrics, Market Support indicators, Equity segment indicators, and UVMs.	
Does this program utilize Integrated Demand Side Management (IDSM)? EE and Multi-DER IDSM	**Link to Existing Implementation Plan, if existing:** N/A

5. Rural Hard-to-Reach Public Agency Direct Install Program

<table>
<tr><td colspan="3">Program Name: Rural-HTR Public Agency Direct Install Program</td></tr>
<tr><td colspan="3">Program ID: SCR-PUB-B5

New / Existing: Existing

Expected Program Duration: 2028 - onwards</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Equity</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

REN (Third-Party Implementer)</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)

Public</td><td>Customer Group(s):

Cities, Counties, Tribes, School Districts, Community Colleges, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencies</td></tr>
<tr><td colspan="2">Sector Challenges:

Resource acquisition programs have historically excluded smaller, rural, and hard-to-reach public agencies due to their low energy savings potential and limited cost-effectiveness. In particular, smaller facilities with minimal energy use often encounter limited energy opportunities, as they frequently lack the capital and staff capacity to pursue energy efficiency upgrades.</td><td>Sector Opportunities (Expected Outcome(s)):

Through a direct install approach, the program unlocks stranded energy savings for smaller, rural, hard-to-reach public agencies whose projects might otherwise be left behind in the clean energy transition. The program increases the number of EE projects implemented in underserved and hard-to-reach communities and promotes the adoption of EE measures that benefit the grid.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The Rural-HTR Public Agency Direct Install (Rural-HTR DI) Program targets small public agency facilities with less than 50kW or 50,000 therms of peak demand usage to help accelerate the public sector's transition to a clean energy future. The program offers no-cost energy efficiency installations and end-to-end project management support to remove barriers such as staffing and budget constraints.</td></tr>
<tr><td colspan="2">Known Equity Concerns in the Selected Markets (if applicable):

Limited funding, technical resources, and knowledge of energy efficiency and electrification opportunities.</td><td>Proposed Solutions to Equity Concerns (if applicable):

The Rural-HTR DI Program provides no-cost, hands-on project management support from project identification through installation and realization of energy savings. The program streamlines the implementation of EE measures at qualified sites to yield energy and peak demand savings.</td></tr>
</table>

Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information) *Direct Install*	**Delivery Type:** (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream-Direct Install, Codes & Standards, etc.) *Downstream – Direct Install*
Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other) Deemed	**Program Total System Benefit (TSB) for 2028-2031:** **TSB:** $13,462,580.92
Annual Budgets for 2028-2031: **2028:** $3,852,760 **2029:** $4,238,035 **2030:** $4,661,825 **2031:** $5,128,023	**Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:** **TRC:** 0.86 **PAC:** 0.86
Anticipated directional and scale changes in budget for years 2032-2035:	**Market Actors necessary for success:** Public agency staff, trade allies (qualified direct installation contractors supporting the program's target measures), and Regional Partners.
High-level description of delivery workforce including necessary scale and its risks: The program supports workforce development initiatives by measuring and reporting on job creation metrics. Supported installations must comply with the HVAC/Advanced Lighting Controls Program and CPUC Workforce Standards as stipulated in D.18-10-008. Sufficient contractors are needed in the market to support EE installations. Risks of identifying contractors for lower population areas across the 13 counties in Southern California.	
Near-term Program Output(s) (1-4 years): Increased underserved public agency enrollment in EE offerings; Simplified EE process for public agencies; Streamlined turnaround time for energy savings realization; Agencies are engaged and educated about sustainability strategies; Increased program participation by smaller public sector customers and regional contractors; Increased collaboration with Regional Partners	
Long Term Outcome (5-10 years): Expand service delivery to all underserved eligible public agencies; Increased penetration of EE at the facility and management levels; Support California's long-term strategic energy and climate goals, including energy code changes; Long-term energy savings delivered in underserved and hard-to-reach areas.	
Does this program interact with other programs in this PA portfolio? If so, describe:	

SoCalREN's PDP (SCR-PUBL-B1) and DER DAC (SCR-PUBL-B2) programs provide engagement and project identification support, serving as an entry point for agencies to access the Rural-HTR DI program. Rural HTR-DI will support SoCalREN's WE&T E-Contractor Academy (SCR-WET-D6) to develop a workforce development pipeline for Small Minority Women Disabled Veteran Business Enterprise (SMWDVBE) contractors to participate in EE programs.	
Program Metrics and Indicators (KPIs): Metrics and Indicators include: TSB; First year annual and lifecycle gas, electric, and demand savings; Agency engagements; Applications submitted and reviewed; Applications approved; Customer agreements signed; GHG Reductions; and Projects installed.	
Does this program utilize Integrated Demand Side Management (IDSM)? None.	**Link to Existing Implementation Plan, if existing:** https://cedars.cpuc.ca.gov/programs/SCR-PUBL-B5/details/

6. Streamlined Savings Pathway (SSP) Program

<table>
<tr><td colspan="3">Program Name: Streamlined Savings Pathway (SSP) Program</td></tr>
<tr><td colspan="3">Program ID: SCR-PUBL-B4

New / Existing: Existing

Expected Program Duration: 2028 - onwards</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Resource Acquisition</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

REN (Third-Party Implementer)</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)

Public</td><td>Customer Group(s): Cities, Counties, Tribes, School Districts, Community Colleges, Public Universities, Special Districts, Federal and State Agencies, Water and Wastewater Agencies</td></tr>
<tr><td colspan="2">Sector Challenges:

Public agencies often lack the funding resources and technical capacity needed to identify and implement EE projects. Strict procurement protocols and lengthy project timelines further complicate delivery requiring dedicated resources to move and complete projects.</td><td>Sector Opportunities (Expected Outcome(s)):

While public agencies often lack the resources to invest in EE without program support, they oversee a substantial building stock with significant energy savings potential. SSP provides targeted offerings that lead to increased adoption of EE measures that benefit the grid and deliver meaningful bill savings to participating agencies.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The program provides incentives for qualifying EE upgrades through deemed, custom, and site-NMEC pathways to public facilities and EE upgrades to water production, distribution, and treatment systems previously offered through the Water Infrastructure Program (SCR-PUBL-B10). To help public agencies overcome common barriers to EE, the program provides technical support and project management assistance, as well as financial incentives based on total system benefit (TSB). These services enable public agencies to implement impactful upgrades that achieve long-term reductions in electricity, natural gas, and greenhouse gas emissions across Southern California, contributing to statewide clean energy goals.</td></tr>
<tr><td colspan="2">Known Equity Concerns in the Selected Markets (if applicable):

Traditional programs often lack incentives to encourage participation from public agencies in DACs. Small cities, tribal governments, and rural areas often face technical, funding, and administrative capacity deficiencies, resulting in delays in transitioning to energy efficiency,</td><td>Proposed Solutions to Equity Concerns (if applicable):

The program provides monetary incentives, expedited project approvals, and no-cost technical assistance and project management support to help public agencies, particularly those serving</td></tr>
</table>

Program Name: Streamlined Savings Pathway (SSP) Program	
particularly in underserved and hard-to-reach communities.	underserved communities, overcome barriers to EE implementation.
Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information) *Direct Install, Technical Assistance, Marketing and Outreach, Incentive/Rebate, Audit, Training*	**Delivery Type:** (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.) *Downstream*
Measurement and Verification Methods: *(e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)* Deemed, Custom, NMEC – Site	**Program Total System Benefit (TSB) for 2028-2031:** **$**53,781,439
Annual Budgets for 2028-2031: **2028:** $6,596,216 **2029:** $7,255,838 **2030:** $7,981,398 **2031:** $8,779,564	**Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:** **TRC:** 1.10 **PAC:** 1.71
Anticipated directional and scale changes in budget for years 2032-2035:	**Market Actors necessary for success:** Public Agencies, Implementers (including outreach staff and energy engineers), qualified Trade Allies (contractors)
High-level description of delivery workforce including necessary scale and its risks: Compliance with HVAC/Advanced Lighting Controls Program and CPUC Workforce Standards as stipulated in D.18-10-008. Sufficient contractors in the market to support EE installations across multiple counties in California. Risks of finding contractors for lower population areas.	
Near-term Program Output(s) (1-4 years): Expand the project pipeline to achieve measurable energy and greenhouse gas savings, while increasing equitable participation by underserved public agencies; Participating Trade Allies stock and promote higher efficiency equipment to other stakeholders; Customers understand the energy cost in their building and water systems and install EE projects that reduce energy consumption	
Long Term Outcome (5-10 years): Operate a reliable program that delivers increased adoption of EE measures at both site and market levels, with a focus on underserved communities; achieve measurable reductions in kWh, kW, fossil gas emissions,	

Program Name: Streamlined Savings Pathway (SSP) Program	
and GHGs; EE processes and technologies become standard practice in this customer segment; increased market penetration of higher efficiency equipment.	
Does this program interact with other programs in this PA portfolio? If so, describe: Yes, this program works in conjunction with the Underserved Communities Strategic Energy Management Program (SCR-PUBL-B8) and the Rural-HTR Public Agency Direct Install Program (SCR-PUBL-B5) to offer comprehensive solutions for public sector facilities that would otherwise be ineligible under traditional EE programs. Both programs regularly coordinate, share best practices, and align efforts through weekly coordination calls. The Project Delivery Program (PDP, SCR-PUBL-B1) channels projects into this program through its outreach activities, while the Distributed Energy Resource Disadvantaged Community (SCR-PUBL-B2) program helps public agencies build upon the energy savings achieved in this program to reach their decarbonization goals.	
Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Examples could include homes electrified, WE&T trainings held, etc.) Metrics and Indicators include: TSB; First year annual and lifecycle gas, electric, and demand savings; Number of agencies introduced to program services, Number of underserved and non-underserved agencies participating in program, Number of applications submitted, reviewed, and approved, Number of completed projects, Number of completed projects approved, Amount of incentive dollars used, and lifecycle GHG emissions avoided. For NMEC specifically, the average annual percentage of energy savings achieved at the meter, the number of projects screened, and the number of projects approved for NMEC eligibility are also tracked.	
Does this program utilize Integrated Demand Side Management (IDSM)? While this program does not anticipate utilizing IDSM funds, the program does support the implementation of flexible load technologies, including programmable heat pump water heaters. The Program partners with the Distributed Energy Resource Disadvantaged Community (SCR-PUBL-B2) program to assist customers with IDSM projects.	**Link to Existing Implementation Plan, if existing:** https://cedars.cpuc.ca.gov/programs/SCR-PUBL-B4/details/

7. Underserved Communities SEM Program

<table>
<tr><td colspan="3">Program Name: Underserved Communities SEM Program</td></tr>
<tr><td colspan="3">Program ID: SCR-PUBL-B9

New / Existing: New

Expected Program Duration: 2028 - Onwards</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Equity</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

REN (Third-Party Implementer)</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)

Public</td><td>Customer Group(s):

Cities, Counties, Tribes, School Districts, Community Colleges, Public Universities, Water and Wastewater Districts, Special Districts, Federal and State Agencies</td></tr>
<tr><td colspan="2">Sector Challenges:

Public agencies, particularly those serving underserved and hard-to-reach communities, are often understaffed and underfunded, resulting in limited staff capacity, technical expertise, and funding to implement energy efficiency upgrades.

Additionally, public agencies have unique governance structures and budgeting cycles, and are generally risk-averse, making them more prone to late adoption of new EE technologies and operational best practices.</td><td>Sector Opportunities (Expected Outcome(s)):

While public agencies face barriers to taking energy action, they operate a significant portion of California’s building stock, including facility types well-suited for a strategic energy management approach, including:

● K-12 schools
● Water and wastewater treatment plants
● Office and administration buildings

The UCSEM program will address capacity and funding limitations by:

● Provide training and support to public agency staff to increase their knowledge of energy efficiency programs and energy management systems
● Support public agencies in identifying energy efficiency opportunities and taking action that will reduce emissions and improve air quality in underserved communities

Expected outcomes include:
● Increased public sector awareness of EE opportunities</td></tr>
</table>

Program Name: Underserved Communities SEM Program	
	● Increased implementation of low to no-cost operational and behavioral EE measures ● Bill savings generated for reinvestment in facility maintenance, more capital-intensive energy upgrades, or other critical community services

Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The UC-SEM Program supports underserved and hard-to-reach public agencies in implementing and sustaining energy efficiency and load management strategies through a six-year engagement. By integrating the core SEM elements —educational modules and site-specific activities— with ongoing technical support and project management, the program empowers under-resourced public agency staff to lower energy use and peak demand charges through behavioral conservation, operational improvements, smart controls, equipment upgrades, and distributed energy resource (DER) strategies. The program will prioritize low- and no-cost energy projects, allowing customers to reduce their energy bill costs and encouraging greater staff engagement toward common goals of improved site efficiency and lower utility costs. The UC-SEM program will alleviate capacity barriers while ensuring program alignment with the rigorous SEM standards outlined in the SEM Design Guide V2.0 through key program innovations, including:

- Development of energy manager tools for participating facilities, including signage with energy management tips that can be posted in strategic areas to encourage behavioral conservation (e.g., near thermostats).
- Milestone incentives for activities that set participants up for future success, including incentives for forming energy teams, conducting treasure hunts (hosted by SEM Energy Coaches).

Savings are measured using the CA SEM Design Guide V2.0 and M&V Guide V4.0.

Known Equity Concerns in the Selected Markets (if applicable):	**Proposed Solutions to Equity Concerns (if applicable):**
Public agencies serving underserved and hard-to-reach communities are historically under-resourced. Underfunding leads to limited budgets and a reduced capacity to prioritize efficient energy management and capitalize on energy savings opportunities. Public buildings and infrastructure in these communities, including schools, administrative buildings, and water treatment facilities, may suffer from decades of disinvestment and deferred maintenance.	The program is structured to generate early successes that foster organizational buy-in and guide participants toward low-capital, high-impact opportunities. Incentives are provided to offset implementation costs and sustain momentum, thereby easing the financial burden. UCSEM will: ● Provide education and ongoing support to public agencies that builds staff capacity, raises awareness among building managers and occupants, and strengthens the agency's overall focus on energy efficiency.

<table>
<tr><th colspan="2">Program Name: Underserved Communities SEM Program</th></tr>
<tr><td></td><td>

Provide expert energy coaches to serve as an extension of staff, supporting participants in developing their energy teams, establishing clear plans, overcoming bureaucratic challenges, and maintaining program momentum.
Work directly with each participant to develop a customized SEM Action Plan. Conduct treasure hunts to identify, prioritize, and implement short-, medium-, and long-term opportunities.
Provide the necessary tools, templates, and guidance to support public agencies in developing their SEM Action Plans in alignment with the CA SEM Design Guide and M&V Guide.

</td></tr>
<tr><td>Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

SEM, Incentive/rebate, Training, Technical Assistance</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)

Downstream</td></tr>
<tr><td>Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)

SEM M&V</td><td>Program Total System Benefit (TSB) for 2028-2031:

$13,076,626</td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $3,601,713

2029: $3,961,885

2030: $4,358,060

2031: $4,793,880</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

TRC: 0.40

PAC: 0.80</td></tr>
<tr><td>Anticipated directional and scale changes in budget for years 2032-2035:</td><td>Market Actors necessary for success:

Public Agency Energy Teams, Implementers, Utility Partners, Regional Partners</td></tr>
</table>

Program Name: Underserved Communities SEM Program

High-level description of delivery workforce including necessary scale and its risks:

To scale, the UC-SEM program requires engaged public agencies that are eager to reduce their energy consumption through long-term engagement with the program. Public agencies serving underserved or hard-to-reach communities often face staffing shortages, deferred maintenance, and limited resources for implementing new initiatives. Hands-on program support is necessary to meet SEM participants where they are and ensure sustained success in the program. This program helps build the capacity of participating staff while generating energy bill savings that can be reinvested back into deeper energy upgrades or other critical community services.

Near-term Program Output(s) (1-4 years):

Engage and educate public agency staff on operations, maintenance, and behavioral energy strategies alongside load shifting and demand response (DR) strategies, and savings opportunities; Leverage collected energy and process data to target capital measures; Develop a project pipeline to achieve measurable energy and greenhouse gas savings.

Long Term Outcome (5-10 years):

Operate a successful SEM program for under-resourced public agencies that delivers increased adoption of EE and DR measures at the site and market level; Achieve reductions in kWh, kW, fossil gas emissions, and GHGs; Cultivate public sector energy leaders in underserved, rural, and hard-to-reach communities; Support the long-term strategic goals of SoCalREN.

Does this program interact with other programs in this PA portfolio? If so, describe:

Yes, UC-SEM will interact with other programs in the SoCalREN portfolio, including SoCalREN's DER DAC Program (SCR-PUBL-B2), ACES Pathway Program (SCR-WET-D2), and Kits for Kids (SCR-RES-A4). Particularly, UC-SEM will:

- Connect participants to the DER DAC (SCR-PUBL-B2) program if they are interested in receiving additional energy services, such as benchmarking, financial proposal support, procurement support, and IDSM measure support, including on-site energy generation and energy storage.
- Empower local paid interns from the ACES Pathway Program (SCR-WET-D2) to serve as Assistant Energy Coaches, supporting program educational modules and on-site activities while gaining hands-on experience in the clean energy sector.
- Refer K-12 school participants to the Kits for Kids (SCR-RES-A4) program when they are interested in engaging third- and fourth-grade students in helping their homes become more energy-efficient.

Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Examples could include homes electrified, WE&T trainings held, etc.)

TSB; annual (after first year) and lifecycle gas, electric, and demand savings; Count of participants, facilities, educational modules, SEM Action Plans delivered, and project opportunities developed by the program; sum of GHG reductions (in carbon equivalents); median of participants' expected first year bill savings.

Program Name: Underserved Communities SEM Program	
Does this program utilize Integrated Demand Side Management (IDSM)? While this program does not anticipate utilizing IDSM funds, the program does introduce EE/DR and multi-DER principles and coordinate with the DER DAC program to support program participants' DER projects.	**Link to Existing Implementation Plan, if existing:** This program will evolve from SoCalREN's current SEM offerings. IPs are linked below: ● Underserved Schools SEM ● Water & Wastewater SEM

G. Residential Sector

1. SoCalREN Rural Hard To Reach Direct Install

<table>
<tr><th colspan="3">Program Name: SoCalREN Rural Hard To Reach Direct Install</th></tr>
<tr><td colspan="3">Program ID: SCR-RES-A5

New / Existing: New

Expected Program Duration: 2025-Onwards</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Equity</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

Third-Party Implementer</td><td>Third-Party Program Implementer (applicable to IOUs only):

ICF</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.)

Residential</td><td>Customer Group(s):

Multifamily property owners

Multifamily contractors</td></tr>
<tr><td colspan="2">Sector Challenges:

Customer experiences and concerns around control versus comfort and willingness to allow third-party control of their assets. Limited information about available incentives and funding opportunities. No dedicated program for small property owners.</td><td>Sector Opportunities (Expected Outcome(s)):

We will conduct customer and property owners’ surveys to identify opportunities for program improvement. We will guide customers to participate in specific incentive programs that can provide various benefit including resiliency, energy savings, comfort/security reduced GHG emissions. We will engage with property owner participants of multifamily programs and develop feature case studies.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

Provides turnkey installation of energy efficiency measures that will reduce electric, natural gas, and water consumption of small (50 units or fewer) apartment buildings that are classified as Hard-to-Reach (HTR) or are located within Disadvantaged Communities (DACs). The program will include outreach needed to enroll buildings in the program, basic energy awareness training for tenants and owners, training and management of direct install contractors, and opportunities for contractors to provide employment and training for disadvantaged workers.</td></tr>
<tr><td colspan="2">Known Equity Concerns in the Selected Markets (if applicable):

High population of HTR customers spread over a broad geographic region. Other programs not currently designed for small property owners.</td><td>Proposed Solutions to Equity Concerns (if applicable):

Created SoCalREN direct install program to immediately help with relief for small property owners.</td></tr>
</table>

Program Name: SoCalREN Rural Hard To Reach Direct Install	
Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information) *Direct install – marketing and outreach*	**Delivery Type:** (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.) *Downstream, Downstream – Direct Install*
Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other) *Deemed*	**Program Total System Benefit (TSB) for 2028-2031:** $ 11,664,848
Annual Budgets for 2028-2031: **2028:** $2,322,440 **2029:** $2,554,684 **2030:** $2,810,144 **2031:** $3,091,168	**Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:** **TRC:** 1.08 **PAC:** 1.27
Anticipated directional and scale changes in budget for years 2032-2035: Anticipate an increase in budget for this program for the 2032-2035 period, dependent on program performance.	**Market Actors necessary for success:** Small multifamily contractors, QA/QC inspectors, regional account manager team
High-level description of delivery workforce including necessary scale and its risks: Workforce requirements include small multifamily contractors, quality contractors must deliver safe and reliable installation directly to customers. Must be state licensed and vetted for quality work. Lack of these contractors will reduce participation. Lack of quality contractors will provide QA/QC issues. Inspectors reduce risk from direct install installations and is needed to reduce liability issues. Regional account management team required to ensure equity goals are met and that all audiences within SoCalREN territory are reached.	
Near-term Program Output(s) (1-4 years): Install EE equipment in small multifamily buildings during program implementation period.	
Long Term Outcome (5-10 years): Move portion of small multifamily market to high efficiency equipment and create lasting awareness.	
Does this program interact with other programs in this PA portfolio? If so, describe: Yes, this PA offers two programs in the residential sector. This example residential program is complemented by the Comprehensive Multifamily Program. Both programs are coordinating and sharing best practices on monthly program management calls.	

Program Name: SoCalREN Rural Hard To Reach Direct Install	
Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Examples could include homes electrified, WE&T trainings held, etc.) TSB, KwH, Therms, number of properties in hard-to-reach counties, number of contractors onboarded	
Does this program utilize Integrated Demand Side Management (IDSM)? EE/DR	**Link to Existing Implementation Plan, if existing:** Link to CEDARS IP

2. Kits for Kids

<table>
<tr><td colspan="3">Program Name: Kits for Kids</td></tr>
<tr><td colspan="3">Program ID: SCR-RES-A4

New / Existing: Existing

Expected Program Duration: 2021- onwards</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Market Support</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

Third-Party Implementer</td><td>Third-Party Program Implementer (applicable to IOUs only):

N/A</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered)

Residential</td><td>Customer Group(s):

Classrooms</td></tr>
<tr><td colspan="2">Sector Challenges:

The COVID-19 pandemic has led to increased residential energy use—up 130% between February and December 2021—as families spend more time at home.

Economic hardship and unemployment have strained household budgets, making energy costs more burdensome.

Reduced tax revenues have impacted state and local governments, leading to budget cuts in school districts and fewer resources for classrooms.

Climate change continues to pose serious threats, with rising temperatures and declining water reserves creating resiliency issues across California</td><td>Sector Opportunities (Expected Outcome(s)):

The SoCalREN Kits for Kids Program offers families no-cost energy-saving measures to help reduce monthly utility bills.

The program supports classrooms with an innovative incentive structure, providing additional resources during a time of financial strain.

It promotes long-term climate action by educating students and families about energy efficiency, encouraging behavior change from youth to adulthood.

The program drives measurable energy savings and builds awareness in residential communities, aligning with broader environmental and educational goals.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

The SoCalREN Kits for Kids Program targets third and fourth grade classrooms, prioritizing schools in Disadvantaged Communities and Hard-to-Reach areas. Students receive free energy efficiency kits and complete at-home activities with their families. The program uses teacher-led enrollment, multilingual materials, and online tools to promote energy savings and awareness. Outcomes include reduced household energy costs, increased energy literacy, and classroom incentive grants based on participation.</td></tr>
</table>

Program Name: Kits for Kids	
Known Equity Concerns in the Selected Markets (if applicable): Many participating schools are located in Disadvantaged Communities (DAC) or meet Hard-to-Reach (HTR) criteria, where families face financial hardship and limited access to energy efficiency programs. Language barriers and lack of internet access further limit engagement, making inclusive, in-language, and offline materials essential for equitable participation.	**Proposed Solutions to Equity Concerns (if applicable):** The program provides multilingual materials and offline activity booklets to support families with limited internet access or language barriers. Schools in DAC and HTR areas are prioritized, and classroom incentives help address resource gaps. These strategies ensure inclusive participation and equitable access to energy efficiency education and benefits.
Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information) Direct Install – Families install energy-saving measures from the kits. Incentive – Classrooms receive voucher rewards based on participation. Training – Teachers guide students through energy efficiency activities. Marketing and Outreach/Information – Materials and activities educate families and promote energy-saving behaviors.	**Delivery Type:** (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.) Downstream/ market support
Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other) Deemed, No savings collected equity program	**Program Total System Benefit (TSB) for 2028-2031:** N/A
Annual Budgets for 2028-2031: **2028:** $1,948,860 **2029:** $2,143,746 **2030:** $2,358,114 **2031:** $2,593,933	**Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:** TRC: N/A PAC: N/A
Anticipated directional and scale changes in budget for years 2032-2035:	**Market Actors necessary for success:** Kit vendor

Program Name: Kits for Kids	
Anticipate an increase in number of kits and cost of kits , classroom sizes may increase	Outreach representatives

High-level description of delivery workforce including necessary scale and its risks:

The program relies on a turnkey vendor and certified diversity supplier, to manufacture, assemble, and distribute energy efficiency kits. The vendor manages logistics, inventory, and shipping from U.S. and international facilities. Risks include tariff-related price increases, long lead times (100–120 days), and potential delays due to customs or supply chain disruptions. Outreach representatives are needed to educate teachers and school districts about available resources.

Near-term Program Output(s) (1-4 years):

Distribution of energy efficiency kits to thousands of households via enrolled classrooms

Enrollment of over 1,000 third and fourth grade classrooms across DAC and HTR schools

Verified installation of energy-saving measures in homes

Delivery of classroom incentive grants based on participation

Increased energy literacy among students and families through educational activities

Long Term Outcome (5-10 years):

Increased energy literacy among students and families through educational activities

Increased participation in energy efficiency programs by participating families now, long term EE behavior by participating students

Does this program interact with other programs in this PA portfolio? If so, describe:

Yes, the Kits for Kids Program operates under the Residential sector of the PA portfolio, as a result all kits include QR code which includes link to family portal. The family portal gives access to the other programs like Multifamily and Hard-to-Reach Direct Install (HTRDI) programs. Additionally, we are collaborating with SoCalREN Public sector programs. Coordination across these programs supports shared outreach strategies, leverages regional partnerships, and enhances service delivery to underserved communities.

Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Examples could include homes electrified, WE&T trainings held, etc.)

Number of classrooms enrolled (targeting 250–360 annually)

Number of kits distributed and installed

Verified energy-saving measures installed (via postcard returns)

Classroom incentive grants awarded

Participation rates in DAC and HTR schools

Program Name: Kits for Kids	
Availability and use of multilingual and offline materials Household energy savings (kWh and therms) Student and family engagement in energy efficiency education	
Does this program utilize Integrated Demand Side Management (IDSM)? EE/DR, Multi-DER IDSM, other or none	**Link to Existing Implementation Plan, if existing:** Link to CEDARS IP

3. Multifamily

<table>
<tr><th colspan="3">Program Name: Comprehensive Multifamily Program</th></tr>
<tr><td colspan="3">Program ID: SCR-RES-A1: Multifamily Program

New / Existing: Existing

Expected Program Duration: 2028 - onwards</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Resource Acquisition</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

Third-Party Implementer</td><td>Third-Party Program Implementer (applicable to IOUs only):

ICF</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered):
Residential</td><td>Customer Group(s):

Multifamily property owners, managers, tenants (including income-qualified households)</td></tr>
<tr><td colspan="2">Sector Challenges: High upfront costs for electrification and high efficiency technologies despite strong state policy direction; rising equipment, material, and labor costs; split incentives between owners and tenants; aging building stock not designed for electrification; limited access to capital for comprehensive upgrades; concerns about tenant disruption; and complex decision making across ownership, financing, and regulatory structures.-efficiency technologies despite strong state policy direction; rising equipment, material, and labor costs; split incentives between owners and tenants; aging building stock not designed for electrification; limited access to capital for comprehensive upgrades; concerns about tenant disruption; and complex decision-making across ownership, financing, and regulatory structures.</td><td>Sector Opportunities (Expected Outcome(s)):

Increased participation in EE program and adoption of EE measures. Cost-effective, whole-building energy savings; improved comfort and health outcomes; reduced utility bills; scalable retrofits across large portfolios.</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

Multifamily Program delivers comprehensive energy efficiency upgrades to existing multifamily properties across Southern California. The program targets deed-restricted affordable housing and market-rate multifamily buildings, with an emphasis on hard-to-reach and underserved communities. Program strategies include no-cost or low-cost energy audits, technical assistance, direct install measures, and performance-based incentives for deeper retrofits. Expected outcomes include measurable energy savings, reduced operating costs, improved tenant comfort, and long-term market transformation in the multifamily sector.</td></tr>
</table>

<table>
<tr><th colspan="2">Program Name: Comprehensive Multifamily Program</th></tr>
<tr><td>Known Equity Concerns in the Selected Markets (if applicable):

High population of HTR customers spread over a broad geographic region. Limited owner access to upfront capital; risk of tenant displacement during upgrades. Lack of access to local trade allies in deeply rural areas.</td><td>Proposed Solutions to Equity Concerns (if applicable):

Prioritize deed-restricted and disadvantaged communities; offer no-cost audits and direct install measures; provide multilingual outreach and contractor coordination; align with tenant protection requirements and affordability preservation. Create and build diverse trade ally network.</td></tr>
<tr><td>Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information)

Marketing & Outreach, Audit, and Rebate</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)

Downstream</td></tr>
<tr><td>Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other)

Deemed, Custom</td><td>Program Total System Benefit (TSB) for 2028-2031:

$ 70,927,652</td></tr>
<tr><td>Annual Budgets for 2028-2031:

2028: $10,635,587
2029: $12,011,646
2030: $13,112,775
2031: $14,324,092</td><td>Cost Effectiveness (TRC and PAC Test Ratios) for 2028-2031:

TRC: 1.63

PAC: 1.31</td></tr>
<tr><td>Anticipated directional and scale changes in budget for years 2032-2035:

Anticipate an increase in budget for this program for the 2032-2035 period, dependent on program performance.</td><td>Market Actors necessary for success:

Multifamily property owners and managers; Trade Ally Network; engineering firms; local jurisdictions; community-based organizations.</td></tr>
<tr><td colspan="2">High-level description of delivery workforce including necessary scale and its risks:

Delivery relies on a network of qualified multifamily contractors, energy auditors, engineers, and program support staff. Workforce risks include contractor capacity constraints, supply chain disruptions, and regional labor shortages, particularly for specialized measures.</td></tr>
<tr><td colspan="2">Near-term Program Output(s) (1-4 years):

Incentive-supported retrofit projects completed across participating multifamily properties.</td></tr>
<tr><td colspan="2">Long Term Outcome (5-10 years):</td></tr>
</table>

Program Name: Comprehensive Multifamily Program	
Sustained reduction in multifamily energy use; improved building performance; increased adoption of high-efficiency technologies; contribution to regional climate and equity goals	
Does this program interact with other programs in this PA portfolio? If so, describe: Yes, this PA offers two programs in the residential sector. This example residential program is complemented by the Small Multifamily Hard to Reach program. Both programs are coordinating and sharing best practices on monthly program management calls.	
Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Number of properties served; dwelling units upgraded; kWh and therm savings; participation in disadvantaged communities; measure installation counts.	
Does this program utilize Integrated Demand Side Management (IDSM)? IDSM	**Link to Existing Implementation Plan, if existing:** https://cedars.cpuc.ca.gov/documents/history/875/

4. Residential Resiliency

<table>
<tr><td colspan="3">Program Name: Residential Resiliency Program</td></tr>
<tr><td colspan="3">Program ID: SCR-RES-A6

New/Existing: New

Expected Program Duration: 2028 - onwards</td></tr>
<tr><td>Portfolio Segment: (Resource Acquisition, Market Support, Equity, Codes and Standards)

Resource Acquisition</td><td>Program Implementer Type: (IOU Core, Third-Party Solicited, REN, CCA)

Third-Party Implementer</td><td>Third-Party Program Implementer (applicable to IOUs only):

ICF</td></tr>
<tr><td colspan="2">Applicable Sector: (e.g., Residential, commercial, industrial, agricultural, public, or cross-cutting, etc.) If multi-sector, provide a list of each sector covered):

Residential</td><td>Customer Group(s):

Single Family Residential</td></tr>
<tr><td colspan="2">Sector Challenges:

Existing single-family homes remain inefficient and costly to implement</td><td>Sector Opportunities (Expected Outcome(s)):

Increased participation in EE program and adoption of EE measures</td></tr>
<tr><td colspan="3">Brief Program Description: (Including customer target, program strategies employed, expected program outcome):

This program serves single family residential customers by delivering energy efficiency upgrades through a combination of incentives, audits, and leveraged capital. The program emphasizes customer education and behavioral interventions to support long term energy savings. Eligible measures may include heat pump water heaters, insulation, smart thermostats, and other high efficiency technologies. Targeted outreach, enhanced incentives, and relationships with financial lending institutions will be used to drive participation.</td></tr>
<tr><td colspan="2">Known Equity Concerns in the Selected Markets (if applicable):

Disproportionate energy burden for low income and disadvantaged households. Limited access to capital and financing options. Language, trust, and access barriers in priority communities</td><td>Proposed Solutions to Equity Concerns (if applicable):

Build up trade ally network ready to serve this region</td></tr>
<tr><td colspan="2">Intervention Strategy: (e.g., SEM, MAP, Direct Install, Incentive/rebate, Finance, Audit, Technical Assistance, Advocacy, Training, Marketing and Outreach/Information):
Incentive, Finance, Marketing and Outreach</td><td>Delivery Type: (e.g., Manufactured Upstream, Midstream-Distributor, Midstream-Retail, Downstream, Downstream - Direct Install, Codes & Standards, etc.)</td></tr>
</table>

Program Name: Residential Resiliency Program	
	Downstream
Measurement and Verification Methods: (e.g., Deemed, Custom, NMEC – Population, NMEC – Site, SEM M&V, Randomized Controlled Trial (RCT), Other) *Deemed, Custom*	**Program Total System Benefit (TSB) for 2028-2031:** $ 24,007,237.27
Annual Budgets for 2028-2031: **2028:** $6,035,988 **2029:** $6,639,587 **2030:** $7,303,546 **2031:** $8,033,900	**Cost Effectiveness (TRC and PAC Test Ratios)** for 2028-2031: **TRC:** 0.81 **PAC:** 0.92 **TRC 2028:** .55 **TRC 2029:** .70 **TRC 2030:** .85 **TRC 2031:** 1.00
Anticipated directional and scale changes in budget for years 2032-2035: Anticipate an increase in budget for this program for the 2032-2035 period, depending on program performance	**Market Actors necessary for success:** Trade Ally Network (Contactors, Distributors, Manufacturers) and Financial Lending Institutions
High-level description of delivery workforce including necessary scale and its risks: The program relies on a large, distributed workforce of licensed contractors, installers, and support staff. Workforce risks include labor shortages, contractor capacity constraints, and potential disruptions to supply chains or retail distribution channels.	
Near-term Program Output(s) (1-4 years): Install EE equipment and show different pathways to DERs for over 500 single family homes during program implementation period.	
Long Term Outcome (5-10 years): Move more of the single-family market to high efficiency equipment and DERs	
Does this program interact with other programs in this PA portfolio? If so, describe:	

Program Name: Residential Resiliency Program	
N/A	
Program Metrics and Indicators (KPIs): (These could include metrics tracked in program contracts and can be inclusive of Equity or Market Support Indicators and other program KPIs). Homes Electrified, Trade Ally Trainings, HTR/DAC customers, Amount Financed	
Does this program utilize Integrated Demand Side Management (IDSM)? EE and Multi-DER IDSM	**Link to Existing Implementation Plan, if existing:**