



Inland Regional Energy Network I-REN Executive Committee

REVISED AGENDA

Tuesday, January 16, 2024
2:00 PM

WRCOG
3390 University Avenue, Suite 200
Riverside, CA 92501

Remote Meeting Locations

CVAG
74-199 El Paseo
West Building, Suite 100
Palm Desert, CA 92260

Town of Apple Valley
14955 Dale Evans Parkway
Apple Valley, CA 92307

Committee members are asked to attend this meeting in person unless remote accommodations have previously been requested and noted on the agenda. The below Zoom link is provided for the convenience of members of the public, presenters, and support staff.

[Public Zoom Link](#)

Meeting ID: 835 4047 4339
Passcode: 428570
Dial in: 669 444 9171 U.S.

In compliance with the Americans with Disabilities Act and Government Code Section 54954.2, if special assistance is needed to participate in the I-REN Executive Committee meeting, please contact WRCOG at (951) 405-6702. Notification of at least 48 hours prior to meeting time will assist staff in

assuring that reasonable arrangements can be made to provide accessibility at the meeting. In compliance with Government Code Section 54957.5, agenda materials distributed within 72 hours prior to the meeting which are public records relating to an open session agenda item will be available for inspection by members of the public prior to the meeting at 3390 University Avenue, Suite 200, Riverside, CA, 92501.

In addition to commenting at the Committee meeting, members of the public may also submit written comments before or during the meeting, prior to the close of public comment to jleonard@wrcog.us.

Any member of the public requiring a reasonable accommodation to participate in this meeting in light of this announcement shall contact Janis Leonard 72 hours prior to the meeting at (951) 405-6702 or jleonard@wrcog.us. Later requests will be accommodated to the extent feasible.

The Committee may take any action on any item listed on the agenda, regardless of the Requested Action.

1. CALL TO ORDER (Crystal Ruiz, Chair)

2. PLEDGE OF ALLEGIANCE

3. ROLL CALL

4. PUBLIC COMMENTS

At this time members of the public can address the Committee regarding any items within the subject matter jurisdiction of the Committee that are not separately listed on this agenda. Members of the public will have an opportunity to speak on agendized items at the time the item is called for discussion. No action may be taken on items not listed on the agenda unless authorized by law. Whenever possible, lengthy testimony should be presented to the Committee in writing and only pertinent points presented orally.

5. CONSENT CALENDAR

All items listed under the Consent Calendar are considered to be routine and may be enacted by one motion. Prior to the motion to consider any action by the Committee, any public comments on any of the Consent Items will be heard. There will be no separate action unless members of the Committee request specific items be removed from the Consent Calendar.

A. Action Minutes from the November 21, 2023, Special I-REN Executive Committee Meeting

Requested Action(s): 1. Approve the Action Minutes from the November 21, 2023, Special I-REN Executive Committee meeting.

B. I-REN Regulatory and Reporting Activities Update

Requested Action(s): 1. Receive and file.

6. REPORTS / DISCUSSION

Members of the public will have an opportunity to speak on agendized items at the time the item is called for discussion.

A. Public Sector Technical Assistance Resource Allocation Policy

Requested Action(s): 1. Approve an I-REN policy for the Public Sector Technical Assistance Program by allowing a maximum of two energy efficiency projects per agency at a time and reserve funding for all eligible agencies, with a maximum of four projects at a time for both counties.

B. Workforce Education & Training Update - Professional Services Agreements for On-Call Workforce Service

Requested Action(s):

1. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a new On-Call Professional Services Agreement between WRCOG and The Energy Coalition for support to I-REN with workforce assessment and working group implementation and facilitation services in an amount not-to-exceed \$175,000, for a term through June 30, 2026, with options for one-year extensions through 2027.
2. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a new On-Call Professional Services Agreement between WRCOG and Riverside Community College District for support to I-REN with workforce assessment, working group implementation and facilitation services, and other support services in an amount not-to-exceed \$195,000, for a term through June 30, 2026, with options for one-year extensions through 2027.
3. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a new On-Call Professional Services Agreement between WRCOG and Chino Valley Chamber of Commerce for support to I-REN with workforce assessment, working group implementation and facilitation services, and other support services in an amount not-to-exceed \$195,000, for a term through June 30, 2026, with options for one-year extensions through 2027.

C. I-REN Strategic Planning Activities Update

Requested Action(s):

1. Approve the 2023-2027 I-REN Strategic Plan.

7. REPORT FROM THE EXECUTIVE COMMITTEE CHAIR

Crystal Ruiz, WRCOG

8. ITEMS FOR FUTURE AGENDAS

Members are invited to suggest additional items to be brought forward for discussion at future Committee meetings.

9. GENERAL ANNOUNCEMENTS

Members are invited to announce items / activities which may be of general interest to the Committee.

10. NEXT MEETING

The next I-REN Executive Committee meeting is scheduled for Tuesday, April 16, 2023, at 2:00 p.m., at the WRCOG office located at 3390 University Avenue, Suite 200, Riverside.

11. ADJOURNMENT

12. AGENCY ACRONYMS

Inland Regional Energy Network Acronym Guide

3C-REN – Tri-County Regional Energy Network (Counties of Ventura, Santa Barbara, and San Luis Obispo)
ABAL – Annual Budget Advice Letter
AHJ – Authority Having Jurisdiction
AVCE – Apple Valley Choice Energy
BayREN – Bay Area Regional Energy Network (nine county REN in Northern California)
BUC – Building Upgrade Concierge
C&S – Codes & Standards
CAEECC – California Energy Efficiency Coordinating Committee
CalChoice – California Choice Energy Authority
Cal ISO – California Independent System Operator
CARB – California Air Resources Board
CCA – Community Choice Aggregator
CCEC – California Climate & Energy Collaborative
CEC – California Energy Commission
COG - Council of Government
CPA – Clean Power Alliance
CPUC – California Public Utilities Commission
CVAG – Coachella Valley Association of Governments
DAC – Disadvantaged Communities
DACAG – Disadvantaged Communities Advisory Group
DCE – Desert Community Energy
DER – Distributed Energy Resources
DOE – U.S Department of Energy
EE – Energy Efficiency
EM&V – Evaluation, Measurement, and Verification
EV – Electric Vehicle
GHG – Greenhouse gas
HTR – Hard To Reach communities
IID – Imperial Irrigation District
IOU – Investor-Owned Utility
I-REN – Inland Regional Energy Network
JCM – Joint Cooperation Memorandum
LGSEC – Local Government Sustainable Energy Coalition
LGP – Local Government Partnership
MOA – Memorandum of Agreement
NEBs – Non-energy Benefits
NMEC – Normalized Metered Energy Consumption
NREL – U.S Department of Energy National Renewable Energy Laboratory
PG&E – Pacific Gas & Electric
PA – Program Administrator
POU – Publicly Owned Utility
REN – Regional Energy Network
RMEA – Rancho Mirage Energy Authority
RPU – Riverside Public Utilities
SBCOG – San Bernardino Council of Governments
SCE – Southern California Edison
SCG / SoCalGas – Southern California Gas Company
SDG&E – San Diego Gas & Electric
SJP – San Jacinto Power
SoCalREN – Southern California Regional Energy Network (all of southern California, administered by Los Angeles County)

TA – Technical Assistance
TOU – Time of use
TRC – Total Resources Cost
V2G – Vehicle to Grid
WE&T – Workforce Education & Training
WRCOG – Western Riverside Council of Governments

I-REN Executive Committee

Action Minutes

1. CALL TO ORDER

The special meeting of the I-REN Executive Committee was called to order by Chair Crystal Ruiz at 2:00 p.m. on November 21, 2023, at the WRCOG office, 3390 University Avenue, Suite 200, Riverside.

2. PLEDGE OF ALLEGIANCE

Chair Ruiz led the Committee members and guests in the Pledge of Allegiance.

3. ROLL CALL

CVAG

- City of Indio - Oscar Ortiz

SBCOG

- City of Rialto - Deborah Robertson
- County of San Bernardino - Curt Hagman
- Town of Apple Valley - Art Bishop

WRCOG

- City of Corona - Jacque Casillas*
- City of San Jacinto - Crystal Ruiz (Chair)

* Arrived after roll call

Absent:

- City of Jurupa Valley - Chris Barajas

4. PUBLIC COMMENTS

There were no public comments.

5. CONSENT CALENDAR

RESULT:	APPROVED AS RECOMMENDED
MOVER:	Hagman
SECONDER:	Bishop
AYES:	Ortiz, Robertson, Hagman, Bishop, Ruiz

A. Action Minutes from the October 17, 2023, Executive Committee Meeting

Action:

1. Approved the Action Minutes from the October 17, 2023, Executive Committee meeting.

6. REPORTS / DISCUSSION

A. Climate Pollution Reduction Grants Funding Opportunity

Action:

1. Received and filed.

7. REPORT FROM THE EXECUTIVE COMMITTEE CHAIR

Chair Ruiz hopes everyone had a happy Veterans Day, and wished everyone a happy Thanksgiving and a merry Christmas.

8. ITEMS FOR FUTURE AGENDAS

Committee member Deborah Robertson asked for a report on microgrid farms and battery farms, and how they are helping energy efficiency and greenhouse gas reduction. She also asked to quantify the number of brown-outs and how they impact businesses with loss of revenue.

9. GENERAL ANNOUNCEMENTS

Committee member Art Bishop wished everyone a happy Thanksgiving.

Casey Dailey, WRCOG Director of Energy and Environmental Programs, announced that the True Up advice letter sent to the CPUC was accepted, so the I-REN budget will see a nominal increase in the next few years.

Committee member Robertson recommended that Committee members look into the SCAG presentation regarding the money coming out and available projects. She suggested aligning with the EPA.

10. NEXT MEETING

The I-REN Executive Committee is dark for the month of December 2023. The next I-REN Executive Committee meeting is scheduled for Tuesday, January 16, 2024, at 2:00 p.m., in WRCOG's office located at 3390 University Avenue, Suite 200, Riverside.

11. ADJOURNMENT

The meeting was adjourned at 3:21 p.m.



Inland Regional Energy Network

I-REN Executive Committee

Staff Report

Subject: I-REN Regulatory and Reporting Activities Update

Contact: David Freedman, CVAG Energy & Sustainability Program Manager,
dfreedman@cvag.org, (760) 346-1127

Date: January 16, 2024

Recommended Action(s):

1. Receive and file.

Summary:

The purpose of this item is to provide an update on I-REN's regulatory and reporting activities. In 2023, I-REN was a party on various California Public Utilities Commission (CPUC) Proceedings, including Energy Efficiency, REN Business Plan Applications, CalChoice Petition for Modification, Integrated Distributed Energy Resources, and Clean Energy Financing Options. I-REN is also monitoring other proceedings including CPUC Building Decarbonization, CPUC Self-Generation Incentive Program (SGIP), California Energy Commission (CEC) 2025 Energy Code Pre-Rulemaking, and CEC Equitable Building Decarbonization (EBD) Program. By participating in and monitoring CPUC and CEC proceedings, I-REN is able to stay up to date on relevant regulatory events impacting I-REN. I-REN has also outlined a schedule for 2024 to comply with CPUC reporting requirements including, annual, monthly and quarterly reports, and other required advice letters.

Discussion:

Initiated in 2019, the Inland Regional Energy Network (I-REN) is a consortium of the Western Riverside Council of Governments, the Coachella Valley Association of Governments, and the San Bernardino Council of Governments, that serve the Counties of Riverside and San Bernardino in the implementation of energy efficiency programs and services to support member agencies and the public. These partners joined together and submitted a Business Plan to the California Public Utilities Commission (CPUC) to establish locally administered, designed, and delivered energy efficiency programs.

On November 18, 2021, the CPUC formally approved the I-REN Business Plan through program year 2027. As presented to the Executive Committee at its March 21, 2023, meeting, WRCOG, on behalf of I-REN, is party to several relevant CPUC proceedings, as required by the CPUC when it approved I-REN's Business Plan in November 2021. In these proceedings, I-REN provides feedback to the CPUC on the matters under consideration in the proceeding and serves as a voice for the member agencies and stakeholders in I-REN's region. In addition, I-REN staff monitors CPUC and California Energy Commission proceedings that I-REN is not a party to but that could affect I-REN. Finally, I-REN is required to provide periodic reporting to the CPUC.

Attachment 1 to this Staff Report provides an overview of I-REN's regulatory proceedings, summarizing the proceedings to which WRCOG, on behalf of I-REN, is a party, as well as the proceedings that I-REN is monitoring. The table in Attachment 2 to this Staff Report illustrates the various reports that I-REN must file with the CPUC throughout the year.

Prior Action(s):

August 15, 2023: The Executive Committee received and filed.

May 16, 2023: The Executive Committee received and filed.

March 21, 2023: The Executive Committee authorized WRCOG, on behalf of I-REN, to provide comments on CPUC proceedings that I-REN is a party to, when the required deadline to provide comments does not allow sufficient time for presentation to the IREN Executive Committee and report the comments at the next meeting of the I-REN Executive Committee.

Financial Summary:

All costs associated with regulatory monitoring and reporting are included in WRCOG's adopted Fiscal Year 2023/2024 Agency Budget under the Energy & Environmental Department.

Attachment(s):

[Attachment 1 - I-REN Regulatory Proceedings Overview](#)

[Attachment 2 - I-REN Required CPUC Reporting](#)

Attachment

I-REN Regulatory Proceedings Overview

I-REN Regulatory Proceedings Overview

I. Proceedings to Which WRCOG on Behalf of I-REN Is a Party

A. CPUC Energy Efficiency Proceeding ([R.13-11-005](#))

1. Proceeding Overview

This proceeding provides a venue for policy changes and regulatory oversight by the California Public Utilities Commission (CPUC) associated with the energy efficiency programs of the large investor-owned electric and natural gas utilities (IOUs), community choice aggregators (CCAs), and regional energy networks (RENs). This includes how Inland Regional Energy Network (I-REN) and other RENs are funded and evaluated.

2. Key I-REN Issues

- I-REN has championed the concept of an Inland REN made up of local governments to help expand equity and energy efficiency in the region, and the important role of local government program administrators.
- The Inland Empire region faces significant challenges, with vast territory and demographics that I-REN's geography represents, and large tracts of disadvantaged communities and income levels that are significantly below the statewide average.
- I-REN shares the CPUC's urgency regarding the need to focus on disadvantaged and underserved populations.
- Access to customer data is a crucial component of successful program implementation, and therefore I-REN supports data sharing between IOUs and RENs and their agents.

3. Key Decisions

- [D.21-11-013](#) (November 18, 2021) – Approves I-REN's energy efficiency business plan, beginning in 2022 and continuing through 2027, with a total budget of approximately \$65 million over this period.
- [Assigned Commissioner and Administrative Law Judges' Amended Scoping Ruling](#) (December 23, 2021) – Sets forth an amended scope and schedule for this proceeding to address new and outstanding issues concerning the CPUC's energy efficiency policy and programs.
- [D.23-02-002](#) (February 2, 2023) – Addresses several topics important to the ongoing success of the CPUC's energy efficiency portfolio, including improvements to the third-party solicitation process, allowing the use of strategic energy management approaches beyond the industrial sector, and adopting data sharing requirements for CPUC-authorized energy efficiency programs.
- [D.23-04-009](#) (April 6, 2023) – Grants the motion of Southern California Regional Energy Network, on behalf of the California Energy Efficiency Coordinating Committee (CAEECC), requesting authorization for the energy efficiency program administrators to use unspent and uncommitted energy efficiency funds up to \$185,000 to fund a

compensation pilot recommended in the Final Report of the CAEECC Compensation Task Force.

- [Administrative Law Judge's Ruling](#) (April 17, 2023) – Provides notice of a draft 2023 Potential and Goals Study (P&G Study) that will inform the CPUC's adoption of energy efficiency goals for 2024 and beyond. Parties were invited to file comments on the draft study, and address the questions included in this ruling, no later than May 8, 2023, and reply comments no later than May 18, 2023. WRCOG on behalf of I-REN filed reply comments noted below.
- [Assigned Commissioner and Administrative Law Judges' Amended Scoping Memo and Ruling](#) (May 11, 2023) – Sets forth an amended scope and schedule to address new and outstanding issues concerning the CPUC's energy efficiency policy and programs, including CAEECC compensation issues and natural gas incentive issues.
- [Decision 23-08-005](#) (August 10, 2023) – Adopts total system benefit and energy savings goals for ratepayer-funded energy efficiency portfolios for 2024 – 2035 based on the 2023 P&G Study. The P&G Study historically (and continuing with the 2023 P&G Study) has provided data and analysis at the IOU Program Administrator (PA) level and is used to set savings goals for the IOU PAs. The Potential and Goals Study does not set goals for RENs and CCA PAs. There is a separate goal-setting process for non-IOU PAs as outlined in D.21-09-037. However, there are useful insights that can be gained from reviewing the P&G Study, e.g., trends in technologies and policy implications, which could inform I-REN program offerings. WRCOG on behalf of I-REN filed comments on the Proposed Decision noted below.
- [Administrative Law Judge's Ruling](#) (November 17, 2023) – Provides notice and opportunity to comment on draft revisions to the rulebook for normalized metered energy consumption (NMEC Rulebook). Parties are invited to provide comments on the draft revised Rulebook and to address the questions set out in the Ruling, no later than no later than February 29, 2024. Reply comments are due no later than March 15, 2024. WRCOG on behalf of I-REN expects to file comments.

4. Status Update

- May 18, 2023 – WRCOG on behalf of I-REN filed reply comments on the ALJ's Ruling of April 17, 2023, recommending that public sector-specific results be included in P&G Studies in future years, as suggested by Southern California Regional Energy Network (SoCalREN).
- July 31, 2023 – WRCOG on behalf of I-REN filed a reply on the P&G Study and provided the following comments:
 - Reporting of Inflation Reduction Act funding should not be mandatory; the emphasis should remain on PAs documenting implementers' outreach activities, rather than tracking and reporting on actual tax credits or direct payments to the customer.
 - I-REN supports comments by PG&E requesting changes to the P&G Study update process to (1) allow for early stakeholder

feedback via an accessible existing tool such as the Public Document Area, and (2) grant additional time for PAs and their implementers to adjust True-Up Advice Letter and Mid-Cycle Advice Letter filings based on the final P&G decision.

5. Upcoming Filings / Decisions / Meetings

- 1st Quarter 2024 and ongoing – 2024-2027 Portfolio Oversight
- February 29, 2024 – Comments on draft revised NMEC Rulebook
- March 15, 2024 – Comments on draft revised NMEC Rulebook

B. CPUC REN Business Plan Applications ([A.22-02-005 et al.](#))

1. Proceeding Overview

The scope of this proceeding is to evaluate the reasonableness of the 2024-2027 portfolio proposals and the 2024-2031 business plan proposals by PAs, including IOUs, two CCAs and RENs. This includes analyzing the reasonableness of the programmatic aspects of the proposals, as well as the budgets, savings estimates, and cost-effectiveness and total system benefit calculations.

2. Key I-REN Issues

- I-REN's business plan was approved in D.21-11-013, so it is not required to submit a business plan in this proceeding.
- The REN evaluation framework established in this proceeding may have implications for I-REN's current portfolio and will determine how I-REN will be evaluated when it applies for CPUC approval of its next business plan for the period beginning 2028.

3. Key Decisions

- [Assigned Commissioner's Scoping Memo and Ruling](#) (June 24, 2022) – Sets forth the issues, need for hearing, schedule, category, and other matters necessary to scope this proceeding.
- [Administrative Law Judge's Ruling](#) (August 2, 2022) – Invites comments on two topics pertaining to the 2024-2031 business plan and 2024-2027 portfolios under consideration in this proceeding: (1) staff proposal to phase out gas energy efficiency incentives, and (2) codes and standards sub-programs and budgets.
- [Administrative Law Judges' Ruling](#) (August 26, 2022) – Provides specific questions for which the CPUC seeks responses in intervenors' prepared testimony. The questions are on: (1) advancement of the Environmental and Social Justice Action Plan; (2) opportunity for energy efficiency (EE) innovation; (3) alignment with external EE funding; and (4) EE integration with integrated demand-side management.
- [D.23-04-035](#) (April 6, 2023) – Addresses a CPUC staff proposal for reducing ratepayer-funded incentives for natural gas EE measures.

This Decision also: (1) establishes a framework that defines and allows continued funding of “exempt measures” — measures that result in gas savings but do not burn gas; (2) establishes a means to determine whether a given measure is (or is not) cost-effective; and (3) provides for working groups to examine and recommend technical guidance for identifying a viable electric alternative (for a given gas measure) and further criteria for custom projects. It has near-term implications for I-REN regarding required participation in a stakeholder process to develop a technical guidance document, plus required additions to 2028 portfolio filings to be submitted in 2026, and potentially other reporting implications.

- [D.23-06-055](#) (June 29, 2023) – Addresses the applications for EE portfolios during the period 2024-2027 and the business plans for 2024-2031 from nine PAs. The Decision also (1) makes adjustments to the allocation of costs for statewide programs and some changes to the statewide portfolio to eliminate some obsolete programs and introduce new ones; (2) approves the Bay Area Regional Energy Network (BayREN) as the first non-utility administrator of a statewide program; (3) approves a new REN called Rural REN, to deliver energy efficiency benefits to underserved customers and communities in the rural areas all over California in four different regions; (4) includes a number of elements addressed to the equity and market support segments of the EE portfolios, including better defining underserved and hard-to-reach customers and communities, as well as adopting success indicators and a process for identifying metrics and goals associated with the indicators to be measured; (5) includes several measures to improve portfolio oversight, including guidance for continued coordination among PAs; and (6) includes guidance for continued emphasis on the market access approach, the use of normalized metered energy consumption methods for estimating energy savings, and the integration of demand-side management opportunities beyond EE into the portfolios.

4. Status Update

D.23-06-055 closed the proceeding. Any additional or ongoing EE policy issues related to the delivery of the portfolios approved in the Decision will be addressed in the EE proceeding noted above, R.13-11-005.

5. Upcoming Filings / Decisions / Meetings

D.23-06-055 directs the development of a non-energy benefits (NEBs) study, to be led by one of the IOUs and involving all PAs and overseen by CPUC Energy Division staff, to identify or develop quantification/estimation methods for NEBs for equity segment customers. The output(s) of this study should be used to update and improve quantification of NEBs as an indicator for equity segment program performance, as well as for consideration by PAs, stakeholders, and Energy Division staff in the equity goals development process. The Decision sets a due date of October 1, 2026, for the NEBs study to be completed. SoCalGas is the lead IOU, and Frontier Energy is participating in the NEBs working group on behalf I-REN.

C. CPUC CalChoice Petition for Modification [\(R.09-11-04\)](#)

1. Proceeding Overview

On May 15, 2023, California Choice Energy Authority (CalChoice) filed a petition requesting the CPUC to modify Decision (D.)14-01-033. This Decision implemented Senate Bill 790, which authorized CCAs to invoke an “elect to administer” (ETA) option for administering certain energy efficiency programs funded by CCA customers. CalChoice believes modification of D.14-01-033 is necessary to ensure that funding for ETA programs is consistent with the Legislature’s intent that CCAs have meaningful opportunities to administer ETA programs. CalChoice proposes that D.14-01-033 be modified to set a minimum 4 percent funding threshold for ETA programs.

2. Key I-REN Issues

- Three of the CalChoice CCAs are located in I-REN territory: Apple Valley Choice Energy, Rancho Mirage Energy Authority and San Jacinto Power. I-REN territory also includes Desert Community Energy, a CCA whose members are the Cities of Palm Desert and Palm Springs with shared staff at CVAG.
- For the I-REN region, meaningful opportunities for CCAs to offer ETA energy efficiency programs represent a reinvestment in communities that historically have suffered from disinvestment—a return of benefits to communities of ratepayers who have faithfully paid the public good charges intended to fund energy efficiency projects across the state.

3. Key Decisions

None.

4. Status Update

- June 14, 2023 – WRCOG on behalf of I-REN filed a Motion for Party Status, which was granted by email ruling the same day.
- August 3, 2023 – CalChoice met with Cheryl Wynn, Chief of Staff for Commissioner Genevieve Shiroma (Assigned Commissioner on the CPUC energy efficiency proceedings) to discuss the petition for modification of D.14-01-033 filed by CalChoice in this proceeding.

5. Upcoming Filings / Decisions / Meetings

None pending.

D. **CPUC Integrated Distributed Energy Resources Proceeding [\(R.22-11-013\)](#)**

1. Proceeding Overview

The CPUC opened this rulemaking to achieve consistency of cost effectiveness assessments, improve data collection and use, and consider equipment performance standards for Distributed Energy Resource (DER) customer programs. This rulemaking serves as a procedural framework for advancing the vision articulated in the customer programs track of the DER Action Plan recently adopted by the CPUC.

2. Key I-REN Issues

- Whether to adopt the Societal Cost Test (SCT) and submitting input on the questions outlined in the Administrative Law Judge ruling issued on February 13, 2023, referred to below.
- Continuing to improve the DER cost-effectiveness process.
- Taking part in the Data Working Group (DWG) activities as described in Track Two of this proceeding, including recommending goals and objectives for expanded use of available data; developing recommendations regarding data sharing, access, and use; developing recommendations regarding data collection and reporting tools; and developing recommendations for data collection in support of equity programs.

3. Key Decisions

- [Order Instituting Rulemaking](#) (November 23, 2022) – Sets forth the issues, need for hearing, schedule, category, and other matters necessary to scope this proceeding.
- [Administrative Law Judge's Ruling](#) (February 13, 2023) – Seeks comments from parties on whether the CPUC should use an SCT or apply recent air quality research results when evaluating the cost effectiveness of DER.
- [Assigned Commissioner's Scoping Memo and Ruling](#) (May 31, 2023) – Sets forth the issues, need for hearing, schedule, category, and other matters necessary to scope this proceeding. This proceeding has two phases. Phase One focuses on issues related to cost-effectiveness of customer DER programs, and policies on improving data usage and access to help customers make informed decisions about adoption, evaluation, and utilization of DERs. There are two tracks in Phase One. Track One examines how to make cost-effectiveness assessments more accurate and consistent across DER programs. Track Two examines the rules and requirements to improve data access to facilitate adoption, evaluation, and utilization of DERs by customers and other entities and to improve DER integration with the grid. Phase Two focuses on developing equipment performance standards.
- [Administrative Law Judge's Ruling](#) (July 17, 2023) – Requests party comments on the draft scope of work for the consultant the CPUC

intends to hire to facilitate, coordinate and manage the work of the Data Working Group, the scope of work for the DWG, and formation of the DWG (e.g., membership).

- [Assigned Commissioner's Ruling](#) (December 1, 2023) – Sets forth (1) the Scope of Work for the Consultant, (2) Scope of Work for the DWG, and (3) guidance for the formation of the DWG. The CPUC will hire a consultant to facilitate, coordinate and manage the work of the DWG, who will report to Energy Division staff and work under their direction and guidance. The work of the DWG should include providing actionable recommendations or solutions on the topics set out in the Ruling.

4. Status Update

- January 9, 2023 – Comments on the Order were filed by the parties, including BayREN, Tri-County Regional Energy Network (3C-REN) and various CCAs.
- February 16, 2023 – WRCOG on behalf of I-REN filed a Motion for Party Status.
- March 14, 2023 – WRCOG Motion for Party Status is granted.
- March 29, 2023 – Pre-hearing Conference. WRCOG on behalf of I-REN participated and gave the following testimony:
 - I-REN agrees that equity should be scoped broadly and considered across all phases and tracks.
 - I-REN is generally supportive of exploring the SCT at least on an informational basis as a possible way to better quantify and implement non-energy benefits.
 - Of particular importance to I-REN are non-energy benefits such as family health and safety and comfort given the disproportionate impacts of climate change on I-REN territory.
 - I-REN is reviewing the staff report and preparing to respond to the ALJ Ruling with additional thoughts and comments on this topic.
- April 27, 2023 – WRCOG on behalf of I-REN filed a response to the ALJ Ruling of February 13, 2023, and provided the following comments:
 - I-REN supports the adoption of an SCT for informational purposes. Having the SCT as an additional reference point will provide a more comprehensive view of the benefits and costs of DERs such as energy efficiency. The adopted SCT could be used for informational purposes across all DER proceedings and should retain flexibility to continue being iterated as new methodologies and new data sets become available.
 - I-REN believes that the methodology used in the Quantifying the Air Quality Impacts of Decarbonization and Distributed Energy Programs in California study is reasonable and accurate. The results of this study could provide valuable inputs to an SCT, particularly given its granular approach to modeling air quality impacts compared to the Air Quality Adder described in the SCT impact evaluation and should be considered when evaluating the cost-effectiveness of DER programs, particularly in the context of

societal benefits that are not captured by current cost-effectiveness testing.

- August 11, 2023 – Comments on the ALJ Ruling of July 17, 2023, were filed by parties, including SoCalREN, BayREN and 3C-REN. SoCalREN noted that the RENs should be explicitly included among the list of the stakeholders participating in the Data Working Group. BayREN and 3C-REN in their joint comments noted that they will collaborate with other RENs to ensure REN representation in DWG cohort.

5. Upcoming Filings / Decisions / Meetings

- Phase One Track One:
 - TBD – Proposed Decision for the SCT, or Air Quality Research Result
 - January 23-25, 2024 – Evidentiary hearing
 - February 21, 2024 – Opening briefs
 - March 13, 2024 – Reply briefs (Track One submitted)
 - June 2024 – Proposed Decision
- Phase One Track Two:
 - TBD – Workshops for the DWGs
 - The IOUs are directed to serve a summary of the DWG progress on the service list of the proceeding every three months from the date of the first DWG working group meeting.
 - Approximately 12 months after the first workshop is held – Recommendations from DWGs are served
 - Within two weeks after Recommendations from the DWGs are served – Ruling requesting Party Comments on the Recommendations from the DWGs
 - TBD – Workshops, if necessary, to discuss Recommendations from the DWGs
 - Three weeks after the conclusion of workshops – Party Comments on the Recommendations from the DWG, filed (Track Two submitted)
 - No later than 90 days after Party Comments on DWG Recommendations are filed – Proposed Decision(s) addressing Recommendations from the DWGs

E. CPUC Clean Energy Financing Options Proceeding [\(R. 20-08-022\)](#)

1. Proceeding Overview

Provides a venue for investigating and designing mechanisms that can help customers finance all the energy investments (EE/DER/demand response) they might wish to make on their properties without artificial barriers, such as those caused by regulatory rules related to funding source. The CPUC proposes to build a cohesive and comprehensive strategy for helping

customers finance energy improvements to their homes and buildings across various DERs.

2. Key I-REN Issues

- This proceeding is an opportunity for I-REN to continue to stay involved with the financing options that are being discussed and align its programming with those options.
- I-REN's portfolio includes commercial and financing programs. The issues in this proceeding touch on I-REN's role as a PA with a robust EE portfolio as well as a collaboration of local governments responsible for helping to meet state and local goals. The availability of financing options plays a critical role in the success of meeting these goals.

3. Key Decisions

- [Order Instituting Rulemaking](#) (August 27, 2020) – Institutes this rulemaking to examine options to assist electricity and natural gas customers with investments in residential and commercial buildings and at industrial and agricultural sites designed to decrease energy use, reduce greenhouse gas (GHG) emissions, and/or produce clean energy to support customers' on-site needs.
- [Administrative Law Judges' Ruling](#) (March 22, 2023) – Seeks additional comment regarding proposals from the IOUs to expand their non-residential on-bill financing (OBF) programs, to better assess the IOUs' proposals regarding the OBF programs.
- [Decision 23-08-026](#) (August 10, 2023) – Authorizes the expansion of the OBF programs administered by the IOUs for non-residential customers to support clean energy technologies beyond EE and approves the proposal of the California Alternative Energy and Advanced Transportation Financing Authority to expand the clean energy technologies eligible under the California Hub for Energy Efficiency Financing programs.

4. Status Update

- March 11, 2021 – WRCOG filed a Motion for Party Status.
- March 12, 2021 – WRCOG Motion for Party Status is granted.
- [D.23-03-011](#) (March 16, 2023) – Extends the statutory deadline in this proceeding until June 30, 2024.

5. Upcoming Filings / Decisions / Meetings

D.23-08-206 directs the IOUs to establish a Tariff On-Bill (TOB) Working Group within 45 days of the issuance of the Decision to further develop a record and consider proposals, which would enable residential customers to finance EE or other clean energy technologies through a utility tariff. The

IOUs must file a Joint TOB Proposal in this proceeding within 270 days of the issuance of the Decision.

II. Proceedings That I-REN Is Monitoring

1. CPUC Building Decarbonization Proceeding [\(R.19-01-011\)](#)

1. Proceeding Overview

On January 31, 2019, pursuant to SB 1477, the CPUC initiated this rulemaking to support the decarbonization of buildings in California. The proceeding is designed to be inclusive of any alternatives that could lead to the reduction of greenhouse gas emissions associated with energy use in buildings [related]... to the State's goals of reducing economy-wide GHG emissions 40% below 1990 levels by 2030 and achieving carbon neutrality by 2045 or sooner.

2. Key I-REN Issues

- Ensure coordination of I-REN programs with state building decarbonization policies.
- Southern California Edison (SCE) is the contracting agent for the Technology and Equipment for Clean Heating (TECH) Initiative, and Frontier Energy, I-REN's Codes & Standards program implementer, is part of the TECH Initiative implementation team.

3. Key Decisions

- [D.20-03-027](#) (March 26, 2020) – Established the TECH Initiative administered by the CPUC addressing space/water heating technologies and the Building Initiative for Low-Emissions Development (BUILD) Program administered by the California Energy Commission (CEC) addressing residential new construction electrification, with total budgets of \$120 million and \$80 million, respectively.
- [D.21-11-002](#) (November 4, 2021) – This decision: (1) adopted certain principles for the application of incentives; (2) established a new Wildfire and Natural Disaster Resiliency Rebuild program; (3) provided guidance on data sharing; (4) directed the study of bill impacts and required utilities to propose rate adjustments in some cases; and (5) directed utilities to collect data on fuels used to power various appliances, including propane.
- [D.22-09-026](#) (September 15, 2022) – Eliminated gas line extension allowances, refunds, and discounts regarding all new applications for gas line extensions submitted on or after July 1, 2023, for all customers in all customer classes.
- [D.23-02-005](#) (February 2, 2023) – Authorizes the transfer of \$50 million appropriated by AB 179 to fund the continued implementation of the TECH Initiative. The new funding became available in mid-April 2023.

- [Assigned Commissioner's Amended Scoping Memo and Ruling](#) (July 26, 2023) – Opens and sets forth the scope and schedule for Phase 3B of this proceeding to further fulfill the goals set out in R.19-01-011. In particular, Phase 3B will consider building decarbonization efforts regarding the reasonableness of modifying or ending electric line extension allowances, refunds, and discounts for “mixed-fuel” new construction (i.e., building projects that use gas and/or propane in addition to electricity). The ruling attaches a staff proposal regarding subsidies for electric line extensions in mixed-fuel new construction.
- [D.23-12-037](#) (December 14, 2023) – Eliminates electric line extension subsidies for all mixed-fuel new construction (building projects that use gas and/or propane in addition to electricity) effective July 1, 2024. Additionally, the new rules adopted therein require all mixed-fuel new construction projects to use actual cost billing of an electric line extension rather than estimated cost billing effective January 1, 2025. To track the progress of the rule changes and to monitor savings from the elimination of electric line extension subsidies for all mixed-fuel new construction, the Decision establishes an annual reporting requirement for California’s three largest electric IOUs beginning May 1, 2024.

4. Status Update

[D.23-12-037](#) (December 14, 2023) – Extends the statutory deadline in this proceeding until December 31, 2025.

5. Upcoming Filings / Decisions / Meetings

Beginning with the second quarterly report in 2023, SCE as the TECH Initiative implementer shall include within its quarterly public reporting strategies and funding for workforce training targeted towards serving equity customers, among other information.

2. CPUC Self-Generation Incentive Program (SGIP) Proceeding ([R. 20-05-012](#))

1. Proceeding Overview

The SGIP was established in 2001 and provides financial incentives for the installation of eligible behind-the-meter distributed generation and energy storage technologies that meet all or a portion of a customer’s electricity needs, including heat pump water heaters (HPWH). The proceeding helps define those technologies, incentives, and rules.

2. Key I-REN Issues

Ensure coordination of I-REN programs with SGIP and improving participation of tribal customers in SGIP.

3. Key Decisions

- [D.22-04-036](#) (April 7, 2022) – Adopts final budgets, incentive levels and other program requirements for the SGIP HPWH program, including training, inspection, and workforce development requirements.
- [Assigned Commissioner’s Ruling](#) (October 26, 2022) – Seeks comments from parties on issues related to improving outcomes for low-income customers under the SGIP and a variety of implementation issues related to the funding authorized by Assembly Bill (AB) 209.
- [Assigned Commissioner’s Ruling](#) (July 12, 2023) – Seeks comments from parties to supplement the proceeding record regarding: (1) improving outcomes for low-income customers under the SGIP; and (2) expanding the SGIP HPWH Program to make a larger number of customers eligible.
- [Administrative Law Judge’s Ruling](#) (July 12, 2023) – Seeks comments from parties to supplement the proceeding record regarding the funding authorized by AB 209 and improving outcomes for low-income customers under the SGIP.
- [D.23-12-004](#) (December 14, 2023) – Modifies the existing HPWH program in D.22-04-036 to expand program eligibility. The Decision also revises the current definition of a qualifying demand response program and revises the eligible software that can be used to model central HPWHs. SGIP Program Administrators (PAs) may use any software approved by the CEC for modeling central heat pump water heaters for compliance with the California Energy Code.

4. Status Update

SGIP PAs have submitted Advice Letter 2-E on May 16, 2023, and a supplemental Advice Letter 2-EA on September 12, 2023, to be reviewed by Energy Division staff. Once approved, the SGIP HPWH program handbook will become effective and should be used by PAs to comply with SGIP HPWH program rules. Going forward, PAs must refer to the most recent SGIP Handbook approved by the CPUC’s advice letter process.

5. Upcoming Filings / Decisions / Meetings

None pending.

3. CEC 2025 Energy Code Pre-Rulemaking [\(22-BSTD-01\)](#)

1. Proceeding Overview

This docket is used to document public interaction regarding preliminary rulemaking activities for the 2025 California Energy Code. This includes the research and gathering of information necessary to develop the documents required to conduct a formal rulemaking proceeding.

2. Key I-REN Issues

- Energy Code enforcement has historically been difficult for local jurisdictions, particularly smaller communities with fewer resources.
- Track and provide information on California Energy Code.
- Perform updates to training curriculums to reflect adopted changes to California Energy Code.

3. Key Decisions

This is not a formal rulemaking docket. A separate formal rulemaking docket will be established to support the development of the 2025 Energy Code.

4. Status Update

- January - March 2023 – Utility-sponsored stakeholder meetings
- May 3, 2023 – The first five draft Codes and Standards Enhancement (CASE) Reports have been published and are ready for stakeholder comments by May 30.
- May 26, 2023 – Six additional CASE reports were published.
- August 2023 – Final CASE Reports submitted to CEC.
- July - September 2023 – CEC pre-rulemaking workshops.
- November 3, 2023 – CEC published 2025 Energy Code Draft Updates (Draft Express Terms)

5. Upcoming Filings / Decisions / Meetings

- January 2023 - June 2024 – CEC Rulemaking for 2025 Energy Code.
- June 2024 – 2025 Energy Code CEC Business Meeting adoption.
- December 2024 – Building Standards Commission approval of 2025 Energy Code.
- January 1, 2026 – 2025 Energy Code effective date.

4. CEC Equitable Building Decarbonization (EBD) Program [\(22-DECARB-03\)](#)

1. Proceeding Overview

AB 209 directed the CEC to develop the EBD Program. The EBD Program will include a direct install program for low- and moderate-income households, which is a type of program that provides and installs energy efficient electric appliances, energy efficiency measures, and related upgrades directly to consumers at minimal or no cost. The EBD Program will also include a statewide incentive program to accelerate deployment of low-carbon building technologies. The primary goals of the program are to reduce greenhouse gas emissions and advance energy equity. The direct install program will include a statewide direct install program and a tribal direct install program. The statewide direct install program will be administered separately in Northern, Central, and Southern California by competitively selected program administrators who will partner with

community-based organizations for culturally appropriate outreach, education, and support for participating households and communities. The state intends to allocate \$783 million for the EBD Program. The Legislature has thus far approved a combined \$494 million for FY 2022-23 and FY 2023-24. The CEC has proposed that 58% of budgeted amounts go to Southern California, based on its population of under resourced communities at 13.6 million people.

2. Key I-REN Issues

- SoCal REN is interested in applying to be the PA for the entire Southern California area, which includes I-REN's region. I-REN and SoCal REN staff have begun preliminary discussions about I-REN's participation in SoCal REN's application.
- I-REN's Business Plan does not include a residential sector. However, I-REN's member agencies have asked for programs to serve their residents. The EBD Program is statewide, so it will be available in the Inland Empire.
- Through its Workforce Education & Training sector, I-REN will be working closely with contractors who provide decarbonization services within the residential sector in the Inland Empire. WE&T resources will be provided to develop local skilled workers.

3. Key Decisions

- [Request for Information](#) (December 9, 2022) – Seeks input and comment to inform the development of the EBD Program. To facilitate recommendations, CEC staff developed a list of questions. Individuals were invited to provide input on staff's questions and program-related topics not posed. Comments were due by January 20, 2023.
- [Equitable Building Decarbonization Direct Install Program Draft Guidelines](#) (May 4, 2023) – Proposes the initial rules and requirements for the program, including funding allocations, household and property eligibility requirements, and eligible measures.
- [Questions on Draft Guidelines](#) (May 4, 2023) – Seeks input and comments on the Draft Equitable Building Decarbonization Direct Install Program Guidelines. To facilitate input, CEC staff developed a list of questions. Comments were welcome in response to these questions and on any other topic related to the EBD Program. Comments were due by June 30, 2023. BayREN and 3C-REN were among the groups submitting comments.
- [Equitable Building Decarbonization Direct Install Program Guidelines \(Adopted\)](#) (October 18, 2023) – The guidelines for the Equitable Building Decarbonization Direct Install Program outline the initial rules and requirements for the program, including funding allocations, household and property eligibility requirements, and eligible measures.

4. Status Update

- May 17, 2023 – Staff Workshop on Draft Equitable Building Decarbonization Direct Install Program Guidelines.
- June 6 - 21, 2023 – Staff Regional Workshops on Equitable Building Decarbonization Direct Install Program and Coordination with Other Building Decarbonization Programs. I-REN staff attended the Santa Rosa workshop on June 12, 2023, and made a presentation on I-REN at the Indio workshop on June 15, 2023.

5. Upcoming Filings / Decisions / Meetings

- Winter 2024 – Direct install program administrators selected through competitive solicitation.
- 2024-2025 – Administrator ramp-up and direct install program roll-out in initial communities.

5. CEC Inflation Reduction Act Residential Energy Rebate Programs ([23-DECARB-01](#))

1. Proceeding Overview

The Inflation Reduction Act provides \$391 billion nationwide to support clean energy and address climate change, including \$4.3 billion designated for the Home Efficiency Rebates (HOMES) Program. California will be allocated \$292 million in HOMES funding to support whole home energy retrofits. At this time, the CEC is planning on incorporating or “braiding” HOMES funding with the EBD Program discussed above to realize administrative efficiencies, thus allowing more funding to go towards decarbonization activities that benefit Californians. If braiding the programs is not feasible, and the CEC needs to develop a separate whole house decarbonization program to meet federal rules, the CEC would like input as to program design.

2. Key I-REN Issues

See above re EBD Program.

3. Key Decisions

[Request for Information](#) (December 21, 2023) – Invites the public to provide comments on the CEC’s approach to program design for the HOMES Program and its application to U.S. Department of Energy for \$292 million in funds. Individuals are invited to provide input on staff questions as well as program-related topics not posed by January 26, 2024.

4. Status Update

None

5. Upcoming Filings / Decisions / Meetings

January 26, 2024 – Deadline for submitting written comments.

Attachment

I-REN Required CPUC Reporting

I-REN Required CPUC Reporting for February 2024 – February 2025

Report Type	Due Date	Content	Status
Monthly Report	Due 30 days after last day of month	Current month's expenditures, plus YTD Expenditures, Committed Funds, Gross and Net Savings for all Programs in the Portfolio.	In progress.
2024-2025 Joint Cooperation Memorandum (JCM)	TBD (approx. 2/29/2024)	Memo describing coordination among overlapping PAs on similar programs. NEW per D.23-06-055 Ordering Paragraph ("OP") 35: JCM now covers two years, is submitted via CEDARS, and deadline is based on TUAL approval date	
2023 Q4 Claims	3/1/2024	Program expenditures and committed funds (YTD) PLUS Project level savings, measures, participant costs, incentives, etc., being claimed in Q4.	Dependent on finalization of invoicing.
Integrated Demand Side Management (IDSMD) Advice Letter (Tier 3)	3/15/2024	NEW for 2024. D.23-06-055 COL 41 allows PAs to set aside up to \$4M or 2.5% of budget for ongoing load shifting that reduces peak consumption and is not event-based. IDSMD programs to be launched during 2024-2027 are to be submitted in an advice letter.	
2023 Annual Monthly Report	4/15/2024	"Month 13" report to align savings and expenditures with annual claim true up and annual report.	
2023 Annual Report	4/15/2024	Narrative and spreadsheet format report on overall Portfolio performance and Program level accomplishments.	
2023 Annual Claims True up	4/15/2024	Yearly report which sums up all Quarterly reports; opportunity for PAs to true up/reconcile any errors in reporting from previous quarters and/or monthly reports.	
Annual Report Overview Presentation to CAEECC	TBD (after 5/1/2024)	NEW for 2024. Per D.23-06-055 at 27, PAs are required to provide a high-level overview of Annual Report near the time it is filed.	

Report Type	Due Date	Content	Status
Joint PAs' Metrics Advice Letter (Tier 2)	5/1/2024	NEW for 2024. Per D.23-06-055 OP 11, Joint PAs are to submit an advice letter clarifying equity and market support indicators adopted in this decision, modifying any common metrics/indicators adopted in Decision 18-05-041, and identifying any baseline info/methodologies for future targets.	
2024 Q1 Claims	6/3/2024	Program expenditures and committed funds (YTD) PLUS Project level savings, measures, participant costs, incentives, etc., being claimed in Q1.	
Joint PAs' AKAB Surveys Advice Letter (Tier 2)	8/1/2024	NEW for 2024. Per D.23-06-055 OP 25, Joint PAs will select PA to lead awareness, knowledge, attitude, and behavior [AKAB] study/surveys to inform baselines, target setting, and goals for the market support and equity segments. Lead PA shall submit advice letter describing study/survey plans.	
Joint PAs' Similar Programs Advice Letter (Tier 2)	8/30/2024	NEW for 2024. Per D.23-06-055 OP 32, Joint PAs are to submit an advice letter to provide information on substantively similar programs, and steps to mitigate/minimize ratepayer risk of program overlap and duplication.	
2024 Q2 Claims	9/13/2024	Program expenditures and committed funds (YTD) PLUS Project level savings, measures, participant costs, incentives, etc., being claimed in Q2.	
Program Segmentation Justification	9/13/2024	NEW for 2024. Per D.23-06-055 OP 21, PAs are to submit a Program Segmentation Justification spreadsheet (Attachment A to decision) to CEDARS	

Report Type	Due Date	Content	Status
Semi-Annual Progress Update to CAEECC	TBD (aprox. 11/1/2024)	NEW for 2024. Per D.23-06-055 at 27, PAs are required to provide semiannual data-driven updates on EE portfolio progress at the CAEECC, including an update on progress, approximately 6 months after the Annual Report filing.	
2024 Q3 Claims	11/29/2024	Program expenditures and committed funds (YTD) PLUS Project level savings, measures, participant costs, incentives, etc., being claimed in Q3.	
2023 Q4 Claims	2/28/2025	Program expenditures and committed funds (YTD) PLUS Project level savings, measures, participant costs, incentives, etc., being claimed in Q4.	

Abbreviations: ALJ = Administrative Law Judge; D = Decision; [CEDARS](#) = California Energy Data and Reporting System; CPUC = California Public Utilities Commission; FE: Frontier Energy; JCM = Joint Cooperation Memorandum; PII = personally identifiable information; PL = program lead; PA = program administrator; Q = quarter of the year; SFTP = Secure File Transfer Protocol; YTD = year to date



Inland Regional Energy Network

I-REN Executive Committee

Staff Report

Subject: Public Sector Technical Assistance Resource Allocation Policy
Contact: Benjamin Druyon, WRCOG Program Manager, bdruyon@wrcog.us, (951) 405-6727
Date: January 16, 2024

Recommended Action(s):

1. Approve an I-REN policy for the Public Sector Technical Assistance Program by allowing a maximum of two energy efficiency projects per agency at a time and reserve funding for all eligible agencies, with a maximum of four projects at a time for both counties.

Summary:

The I-REN Public Sector Programs offer Technical Assistance services to agencies including staff trainings and facility benchmarking, as well as direct financial incentives for various energy efficiency retrofit projects. Resource allocation has been an important topic to our members, who have asked for some policy options to consider.

This policy option, which allows a maximum of two energy efficiency projects per agency at a time and reserve funding for all eligible agencies, but a maximum of four projects for counties, will enable I-REN to establish resource allocation for its Public Sector Technical Assistance Program. This policy was the most preferred of the four policies presented at the October 17, 2023, meeting and will allow each qualified I-REN agency the opportunity to maximize the benefits from I-REN's Public Sector offerings.

Discussion:

Background

In November 2021, the California Public Utilities Commission (CPUC) approved the I-REN Business Plan with a budget of \$65M for program years 2022 - 2027. The I-REN Business Plan included multiple goals across three program sectors that were developed based on input from stakeholders within Riverside and San Bernardino Counties since 2019.

On April 7, 2022, the CPUC adopted an Environmental and Social Justice (ESJ) Action Plan with a mission to “regulate essential utility services to protect consumers and safeguard the environment, assuring safe and reliable access to all Californians.” The ESJ Action Plan establishes a definition of “ESJ Communities” for the purposes of CPUC policy and programs, as “predominantly communities of color or low-income communities that are underrepresented in the policy setting or decision-making process, subject to a disproportionate impact from one or more environmental hazards, and are likely to experience disparate implementation of environmental regulations and socioeconomic investments in their communities.” These ESJ Communities include Tribal lands, households with incomes below 80%

of the area median income, and low-income census tracts where combined household incomes are less than 80% of area or state median income.

Because I-REN is funded from ratepayer dollars approved by the CPUC, the CPUC ESJ Action Plan heavily influences the development and distribution of I-REN's programs and offerings. Additionally, the topic of equitable distribution of I-REN program resources has been a concern with the I-REN Executive Committee for some time.

At the April 18, 2023, Executive Committee meeting, staff explained how the I-REN Business Plan was written with equity at the center and focuses on disadvantaged and underserved communities. Examples were given on how I-REN's resources are available to all communities without regard to geography, such as virtual trainings and webinars, orientation meetings, and the Fellowship Program. I-REN Executive Committee members were concerned with how I-REN's Public Sector Technical Assistance services will be distributed and directed staff to develop a methodology for distributing I-REN's resources equally throughout Riverside and San Bernardino Counties. Four policy options were developed and presented to the committee and ranked in order of preference. The policy allowing a maximum of two energy efficiency projects per agency at a time and reserve funding for all eligible agencies, but a maximum of four projects for counties was the most preferred policy.

Public Sector Technical Assistance Policy

I-REN's Public Sector programs offer a variety of services to agencies including staff trainings and facility benchmarking. The most cost-intensive service is anticipated to be technical assistance and project management support for individual energy efficiency projects. These project services are customized to each agency, but generally include an engineering site visit, an energy model, funding, financing applications, and more.

To ensure these energy efficiency project support resources are distributed in alignment with I-REN goals, the I-REN staff and The Energy Coalition (TEC) developed four policy options to guide the I-REN team with the allocation of these resources. The following policies, which optimize various goals, were presented to the Executive Committee and asked to be ranked by preference. Below are the policies that were presented at the October 17, 2023 meeting, which are ranked below in order of lowest to highest preference at #1, #2, #3, and #4.

1. Policy: Provide the maximum number of energy efficiency project services within the given budget on a first come, first served basis.
 - a. Goal: Maximize the number of projects supported.
 - b. Outcome: I-REN can deliver support for up to 200 projects between 2023 and 2027 within the given budget.*
 - i. Pros:
 - Will likely be able to meet audit and spend goals.
 - ii. Cons:
 - Could mean some agencies benefit more than others.
 - A small number of agencies could rapidly reserve the budget for these services.
2. Policy: Support a maximum of one energy efficiency project per agency at a time and reserve funding for all eligible agencies.** Assume a high adoption of project services by each agency.
 - a. Goal: Reserve funds for all eligible agencies to be able to complete one project at a time.
 - b. Note: A new project can be supported once agency approves project scope to move

forward to construction for the initial project.

c. Outcome: Support up to four projects per agency between 2023 and 2027.

i. Pros:

- Equal distribution of resources.

ii. Cons:

- If not all agencies want to leverage project services, I-REN could be needlessly capping other agencies that have the resources to move forward with multiple projects at once.
- It will be difficult to meet I-REN goals if not all agencies leverage project support services.

3. Policy: Support a maximum of two energy efficiency projects per agency at a time and reserve funding for all eligible agencies.** Assume a moderate adoption of project services by each agency.

a. Goal: Reserve funds for all eligible agencies to be able to complete two projects at a time with the consideration that not all agencies will utilize each project support opportunity available to them.

b. Note: A new project can be supported once agency approves project scope to move forward to construction for the initial project.

c. Outcome: Support up to eight projects per agency between 2023 and 2027.

i. Pros:

- Equal distribution of resources.
- Takes into account that not all agencies will be interested in these services (or not each year) and provides more of an opportunity for interested agencies to leverage the services.

ii. Cons:

- If not all agencies want to leverage project services, I-REN could be needlessly capping other agencies that have the resources to move forward with multiple projects at once.
- If agencies are more active, more funds could need to be allocated to project services.

4. Policy: Support a maximum of two energy efficiency projects per agency at a time and reserve funding for all eligible agencies, but a maximum of four projects for counties.** Assume a moderate adoption of project services by each agency.

a. Goal: Reserve funds for all eligible agencies to be able to complete two projects at a time with the consideration that not all agencies will utilize each project support opportunity available. Provide more resources for counties with more assets.

b. Note: A new project can be supported once agency approves project scope to move forward to construction for the initial project.

c. Outcome: Support up to eight projects per agency (16 for Riverside and San Bernardino Counties) between 2023 and 2027.

i. Pros:

- Equal distribution of resources, but more resources for Riverside and San Bernardino Counties due to size.
- Takes into account that not all agencies will be interested in these services (or not each year) and provides more of an opportunity for interested agencies to leverage the services.

ii. Cons:

- If not all agencies want to leverage project services, I-REN could be needlessly

capping other agencies that have the resources to move forward with multiple projects at once.

- If agencies are more active, more funds could need to be allocated to project services.
- County resources may not be equally distributed throughout the county areas.

*Total number of projects supported may adjust based on scopes of individual projects. Estimates based on TEC's experience with similar scope.

**Total eligible agencies considered is 51 agencies (54 member agencies less eight agencies served by municipally owned utilities plus an assumed five non-member agencies).

Present situation

On October 17, 2023, the I-REN Executive Committee ranked the four policy options presented by order of priority, selecting #4 as highest preference, followed by #3, then #2, and finally #1. Due to the governing rules for I-REN, CVAG was not in a position to vote on its preferred policy and needed to wait until the CVAG governing body voted on its preferred policy before I-REN voting could occur. CVAG has met and has made its recommendation.

Based on feedback from the October I-REN Executive Committee meeting and the subsequent decisions by CVAG, staff is requesting the I-REN Executive Committee approve Policy #4, as identified above, and direct I-REN's efforts to establish resource allocation for the Public Sector Technical Assistance Program by allowing a maximum of two energy efficiency projects per agency at a time and reserve funding for all eligible agencies, but a maximum of four projects for counties.

Staff will provide periodic updates on the progress of the Program and will provide, at minimum, an annual review of the completed projects and the available remaining resources to ensure I-REN is spending its resources equitably, effectively, and efficiently.

Prior Action(s):

October 17, 2023: The Executive Committee ranked the four policy options presented by order of priority, selecting #4 as highest preference, followed by #3, then #2, and finally #1.

Financial Summary:

Activities related to this item are included in the approved WRCOG Fiscal Year 2023/2024 budget under the I-REN Fund (180).

Attachment(s):

None.



Inland Regional Energy Network

I-REN Executive Committee

Staff Report

Subject: Workforce Education & Training Update - Professional Services Agreements for On-Call Workforce Service

Contact: Tyler Masters, WRCOG Program Manager, tmasters@wrcog.us, (951) 405-6732

Date: January 16, 2024

Recommended Action(s):

1. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a new On-Call Professional Services Agreement between WRCOG and The Energy Coalition for support to I-REN with workforce assessment and working group implementation and facilitation services in an amount not-to-exceed \$175,000, for a term through June 30, 2026, with options for one-year extensions through 2027.
2. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a new On-Call Professional Services Agreement between WRCOG and Riverside Community College District for support to I-REN with workforce assessment, working group implementation and facilitation services, and other support services in an amount not-to-exceed \$195,000, for a term through June 30, 2026, with options for one-year extensions through 2027.
3. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a new On-Call Professional Services Agreement between WRCOG and Chino Valley Chamber of Commerce for support to I-REN with workforce assessment, working group implementation and facilitation services, and other support services in an amount not-to-exceed \$195,000, for a term through June 30, 2026, with options for one-year extensions through 2027.

Summary:

In April 2023, the Inland Regional Energy Network (I-REN) Executive Committee approved the Fiscal Year (FY) 2023/2024 Agency Budget. The approved FY 2023/2024 Workforce Education & Training (WE&T) Sector budget, which is roughly \$2.51M, currently includes line items for the I-REN Energy Fellowship, energy certification, and workforce training programs, as well as participation of I-REN member agencies in California's Energy Efficiency Landscape through paid membership(s) in the Local Government Sustainable Energy Coalition (LGSEC). These line items leave roughly \$440,000 in an unallocated budget for additional programs and support within the I-REN WE&T Sector. During the April 2023 I-REN Executive Committee meeting, it was mentioned that staff would return later to discuss and receive direction for these unallocated funds.

On October 17, 2023, staff presented on the need to bring on energy and workforce consultant expertise to support three I-REN workforce sector tasks: 1) develop a workforce market assessment, 2) organize and facilitate working / focus groups, 3) and support in other administrative workforce services. On November 1, 2023, staff released an On-Call Request for Proposals (RFP). Staff received five

proposals. Through December 2023, the I-REN evaluation committee evaluated proposed and conducted interviews. Staff recommend entering into a contract for three proposers (The Energy Coalition, Riverside Community College District, and Chino Valley Chamber of Commerce) to support one or multiple of the I-REN workforce tasks identified in the RFP.

Discussion:
Background

In November 2021, the California Public Utilities Commission (CPUC) approved the I-REN Business Plan with a budget of \$65M for program years 2022 - 2027. The I-REN Business Plan included multiple goals across three program sectors (Public Sector, Codes & Standards, and WE&T) that were developed based on input from stakeholders within Riverside and San Bernardino Counties since 2019.

One of these program sectors identified within I-REN service territory is WE&T. The total budget for the WE&T Sector through 2027 is \$15.1M. The goal of this Sector is to ensure there is a trained workforce to support and realize energy efficiency savings goals across all sectors.

Present Situation

On September 18, 2023, I-REN's WE&T sector launched its first program, the I-REN Energy Fellowship. During the development of the I-REN Fellowship, I-REN staff continue to assess other WE&T Sector program initiatives (i.e., energy certification, and workforce training programs). As part of this informal assessment, staff have met with over 30 local organizations, and developed relationships with various educational institutions, workforce organizations, and community-based organizations specialized in supporting job paths in energy fields. One key takeaway from these meetings is that there are many deep and impactful workforce programs in the Inland Empire; however, due to the specific nature of various workforce programs most focus either on 1) engaging students, 2) training the current workforce, or 3) connect recently trained students to employers, but there are few programs that connect one of these important components of the job pathway process to the next.

The various components of the WE&T sector and job pathways connections are technical in nature. It is important to engage and connect interested job seekers to the training resources to help upskill and further develop into their careers and provide the expertise and knowledge specific to meet the demands of employers within both Riverside and San Bernardino Counties. Staff believes it will be useful for the long-term growth and development of the WE&T Sector programs to solicit a workforce subject matter expert / consultant to provide I-REN with the following services:

1. Task 1 - Develop a workforce market assessment (including but not limited to the analysis of current K-12, community colleges, Career Technical Education, universities, apprenticeships, pre-apprenticeships, trade and union program opportunities) - estimated \$75,000 one-time contract amount.
2. Task 2 - Implement and facilitate focus group discussions, working group roundtables, and event participation and facilitation - estimated \$50,000 budget annually.
3. Task 3 - Other support services including but not limited to: utilize market assessment to develop scopes of work for future RFPs or general program administration - estimated \$20,000 for on-call support.

I-REN released RFP No. 23-05, I-REN Workforce, Education, and Training Program Support Services

On-Call, on November 1, 2023. Responses to the RFP were due on November 29, 2023. WRCOG received the following number of responses for the respective tasks:

- 5 submittals for Task 1 - Workforce market Assessment
- 5 submittals for Task 2 - Focus / Working groups organization and facilitation
- 4 submittals for Task 3 - Other workforce support services

The proposal evaluation committee, which consisted of WRCOG, CVAG, and SBCOG staff, reviewed the technical approaches proposed, qualifications of the firms, as well as the experience of the proposed project team within I-REN territory and its member agencies. WRCOG values experience in the subregion from consultants as the I-REN subregion faces unique and historical challenges. WRCOG utilizes on-call contracts to create a bench of qualified consultants that can support programs on a specific and task-by-task basis. The purpose of this on-call consultant bench is to provide assistance as quickly as possible and perform the assistance in an efficient manner. Consultants with experience in the subregion and familiarity with member agency staff can achieve this. In this structure, services will not be performed until authorized by a fully executed Task Order. The evaluation committee recommends placing consultants listed below on its On-Call Planning consultant bench, based on the respective task:

- Task 1: Workforce Market Assessment
 - The Energy Coalition
 - Riverside Community College District
 - Chino Valley Chamber of Commerce
- Task 2: Meetings and Working Group Facilitation
 - The Energy Coalition
 - Riverside Community College District
 - Chino Valley Chamber of Commerce
- Task 3: Other I-REN Workforce Support Services
 - Riverside Community College District
 - Chino Valley Chamber of Commerce

On-Call Professional Service Agreements are established with specific language stating that specific work is authorized through a task work order process, and that WRCOG, as I-RENs contract administrator, is under no obligation to provide the funding as set in the On-Call Agreement until a task order is issued. As an On-Call Agreement, these contracts do not create an obligation that work will be assigned but rather set a maximum limit for work to be authorized. In the case that the need for this work does not arise, WRCOG is under no obligation to provide this funding to these professional service providers.

After receiving direction by the I-REN Executive Committee, WRCOG, as the lead administrative agency, will take this item to WRCOG's Executive Committee, on February 5, 2024, to authorize WRCOG's Executive Director to execute the contract(s).

Prior Action(s):

October 17, 2023: The Executive Committee received and filed.

Financial Summary:

Activities related to the Workforce Education & Training Sector are included under the I-REN Budget in

Fund 180, under the Workforce Education & Training subprogram. The total not-to-exceed amount of \$195,000 is for the entire contract, with anticipated Task Orders issued for each of the identified scopes of work.

Attachment(s):

None.



Inland Regional Energy Network

I-REN Executive Committee

Staff Report

Subject: I-REN Strategic Planning Activities Update
Contact: Benjamin Druyon, WRCOG Program Manager, bdruyon@wrcog.us, (951) 405-6727
Date: January 16, 2024

Recommended Action(s):

1. Approve the 2023-2027 I-REN Strategic Plan.

Summary:

The 2023-2027 I-REN Strategic Plan was developed to ensure effective and efficient use of CPUC funding, to identify clear priorities and actions, and to ensure that activities and engagement are aligned across all members of I-REN.

The I-REN Strategic Plan provides a path forward for the organization over the next five years with a focus on building a robust foundation for growth and innovation. This Strategic Plan explores how the organization, and its resources, services, and programs, will meet future needs for the Inland Empire counties and member agencies. The Strategic Plan is an action-oriented plan with strategies and tactics to achieve the organization's objectives, including a framework for programs to evolve to meet bigger goals related to equity market transformation.

Discussion:

Background

In November 2021, the California Public Utilities Commission (CPUC) approved the I-REN Business Plan with a budget of \$65M for program years 2022 - 2027. The I-REN Business Plan included multiple goals across three program sectors that were developed based on input from stakeholders within Riverside and San Bernardino Counties since 2019.

To help facilitate the goals in the Business Plan, I-REN has developed a 5-year organizational Strategic Plan to ensure effective and efficient use of CPUC funding, to identify clear priorities and actions, and to ensure that activities and engagement are aligned across all members of I-REN. This process included several avenues for stakeholder feedback, including a survey, small group conversations, and in-person and virtual community workshops.

The Strategic Plan process presented a key opportunity for the Executive Committee to shape the direction, focus, and priorities of I-REN. The Business Plan serves as "what" I-REN intends to accomplish and the Strategic Plan represents "how" I-REN will accomplish those goals. This Strategic Plan includes input and insight from Executive Committee members and the communities that I-REN

serves and is critical to ensure the effective use of ratepayer dollars in achieving I-REN goals.

At the March 21, 2023, Executive Committee meeting, BluePoint Planning shared a presentation about the Strategic Plan and provided a timeline for the process of creating and implementing the Plan, which was expected to be completed by July 2023. The presentation explained how other RENs operated their programs and how most of their funding was used for technical support, workforce and education, and marketing and outreach, which are equally available and spread throughout the region.

At the May 16, 2023, Executive Committee meeting, BluePoint shared a presentation on the further development of the Strategic Plan, defining what Social and Racial Equity means for I-REN and establishing three equity principles: Procedural Equity, Distributional Equity, and Structural Equity. The presentation went on to list the top five guiding principles for I-REN's organizational strategic framework that were identified through surveys and interviews, which are to be equitable, inclusive, resilient, accessible, and responsive. The presentation wrapped up with a list of four goals and their strategies.

- Goal 1 - Cohesive Region Strategies
 - Effective Governance, Data Sharing and Monitoring, Program Design & Delivery.
- Goal 2 - First 2 Years Strategies
 - Program Priorities, Roll-Out Strategy, Reporting and Performance.
- Goal 3 - Awareness & Relationships Strategies
 - Regional Outreach, Education, and Engagement, Community Roundtables, Dedicated Partnerships, and State Actors.
- Goal 4 - Internal Organization Strategies
 - Strong Organization, Regulatory Capacity, and Performance Management.

BluePoint continued to work on the draft Strategic Plan, using the comments and feedback from the Committee to complete the following:

1. Finalize the Strategic Plan Goals and equity definition;
2. Draft and refine the strategies, objectives, and desired outcomes of the plan;
3. Draft tactics that BluePoint presented to I-REN staff; and
4. BluePoint and I-REN staff met to finalize tactics, identify priorities, identify roles and responsibilities, and set a timeline for activities.

At its August 15, 2023, meeting, this Committee approved the draft Strategic Plan and directed the Executive Director to provide a final version for approval at the next meeting.

Present Situation

The I-REN Strategic Plan will be used to guide and track I-REN's activities and hold I-REN accountable to achieving the goals and outcomes set forth in the Strategic Plan document. Staff will continue to provide updates and progress reports to the committee as needed.

To date, I-REN has accomplished the following outcomes in each of the four goals:

1. Cohesive Region
 - Established a quarterly meeting cadence for the I-REN Executive Committee
 - Developed educational documents and materials for onboarding member agencies

- Held orientations with each agency and are following up with 1-on-1 meetings
 - Created the I-REN marketing brand and guidelines establishing I-REN as a cohesive entity
2. First 2 years
- Drafted a policy to establish resource allocation for the Public Sector Programs
 - Established an incentive structure for the Public Sector Program
 - Contracted with and established routine meeting schedules with program implementers
 - Established recurring meetings with CPUC staff, other Program Administrators, and other regulatory parties
 - Placed 11 Fellows to date for the Workforce Education & Training program
 - Held 12 trainings to date for the Codes & Standards program
3. Awareness & Relationships
- Continued communication with member agencies, assessing their needs
 - Attended multiple job fairs, career fairs, and meetings with educational institutions
 - Conducted surveys to determine I-REN's member agency's needs
 - Participated in regular meetings with statewide government agencies and committees
4. Internal Organization
- Established a central repository for I-REN documents and materials
 - Established I-REN's governance structure
 - Determined appropriate lead and co-lead personnel for each of I-REN's programs
 - Established approval processes, review processes, and communication protocols

BluePoint Planning will provide a presentation on the final I-REN Strategic Plan and staff will seek approval of the final 2023-2027 I-REN Strategic Plan.

Prior Action(s):

August 15, 2023: The Executive Committee approved the draft Strategic Plan and directed the Executive Director to provide a final version for approval at the next meeting.

Financial Summary:

Activities related to this item are included in the approved WRCOG Fiscal Year 2023/2024 budget under the I-REN Fund (180).

In March 2022, the WRCOG Executive Committee approved a Professional Services Agreement with Frontier Energy and its subconsultant (BluePoint Planning) to support implementation activities of I-REN, one of which is to facilitate the development of a Strategic Plan. Frontier energy was selected after public solicitation of an RFP and evaluation by all partner COGs. The total contract amount is not-to-exceed \$793,701 through the end of calendar year 2025.

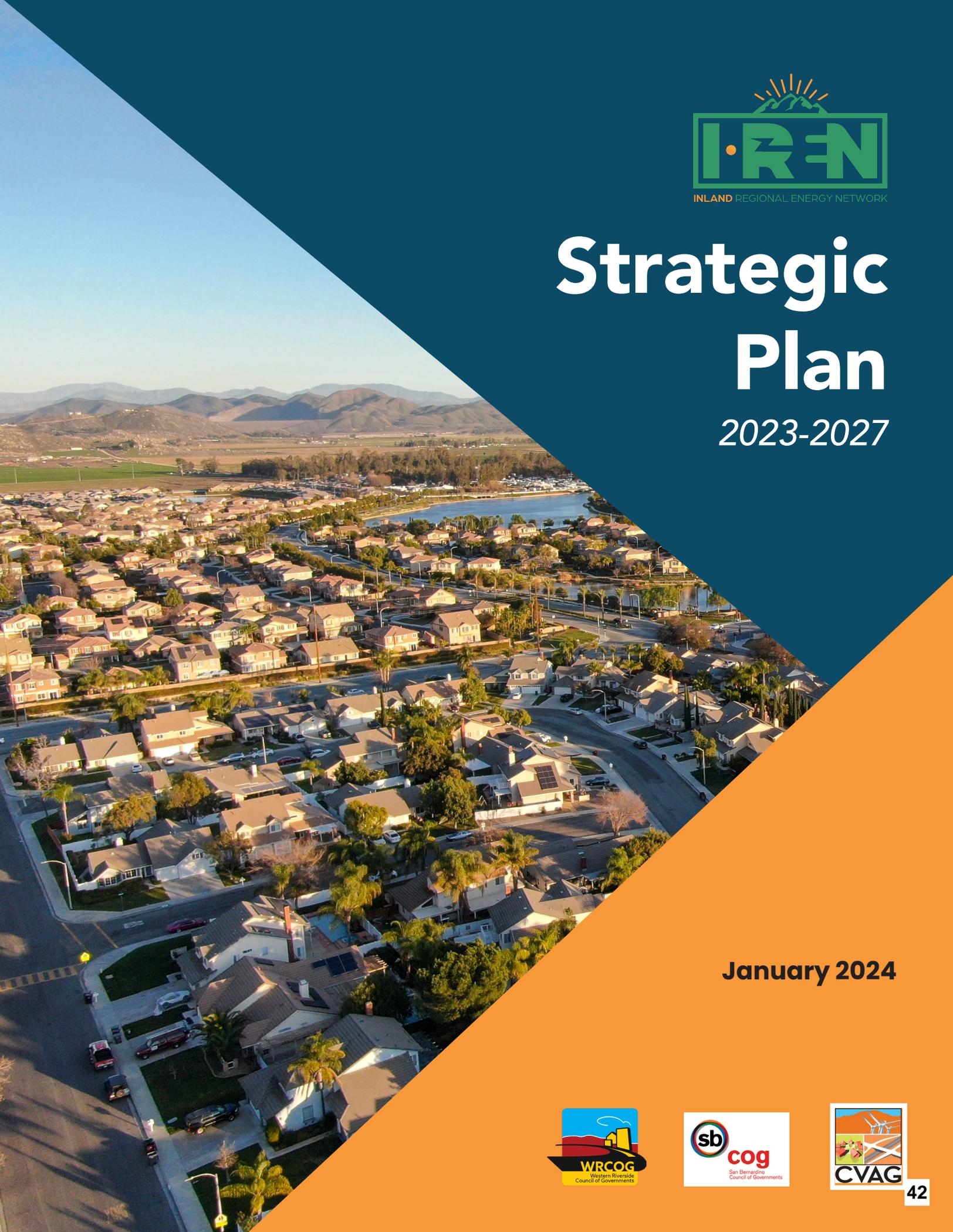
Attachment(s):

[Attachment 1 - I-REN 2023-2027 Strategic Plan](#)



Strategic Plan

2023-2027



January 2024





Table of Contents



- 1. Letter from I-REN..... i**
- 2. Introduction..... 1**
 - About I-REN 1
 - I-REN Business Plan 1
- 3. Program Areas 2**
 - Public Sector..... 2
 - Codes & Standards..... 2
 - Workforce Education & Training..... 2
- 3. I-REN Organization and Leadership 3**
- 4. Strategic Plan Purpose and Need 4**
- 5. Strategic Plan Process..... 4**
- 6. Strategic Plan Framework..... 5**
- 7. Goals and Strategies 6**
 - Goal 1: Cohesive Region 6
 - Goal 2: First 2 Years..... 8
 - Goal 3: Awareness & Relationships 10
 - Goal 4: Internal Organization 13
- 8. Priorities and Key Activities..... 15**
- 9. Acknowledgments..... 16**



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Letter from Casey Dailey

Inland Regional Energy Network, Administrative Lead

To Community Members and Local Governments,

The Inland Empire is home to over 4.6 million people and covers over 27,000 square miles, the 3rd largest region in California. With the approval of the Inland Regional Energy Network (I-REN) in 2022, the region joins California's transition to clean, affordable energy, **bringing \$65 million dollars in ratepayer funding**, and a new organization operated and managed by local leaders.

This 3-year Strategic Plan supports I-REN by focusing and aligning priorities, needs, and resources to effectively guide the launch of I-REN's energy efficiency programs - public buildings, workforce, education and training, and codes and standards - in 2024 and beyond. The Plan is the culmination of a 10-month process and discussions with internal and external stakeholders, including representatives of the region's three Councils of Government, and potential partners.

The Strategic Plan's four goals and strategies are designed to build success for I-REN's initial program offerings and advance the organization so it can expand programs to residential and commercial buildings and continue funding in future years. A cornerstone of this plan is articulating the role and importance of the community in informing and guiding program development, including member cities of the three Council of Governments, special districts, tribes, and other communities. Finally, this Plan is designed to ensure that the benefits and resources provided by ratepayers are equally shared throughout the region, supporting growth and resilience in a changing climate.

The I-REN staff and Executive Committee are dedicated to implementing this plan over the coming years and tapping the innovation and dynamic character of the region to become a well-established, effective, and impactful organization.

Sincerely,

Casey Dailey

Casey Dailey
Director of Energy & Environmental Programs
Western Riverside Council of Governments

The Coachella Valley Association of Governments and San Bernardino Council of Governments have partnered with the Western Riverside Council of Governments to develop I-REN to serve the cities and communities of our region.



Introduction



About I-REN

I-REN, the Inland Regional Energy Network is a coalition of three councils of governments, the Western Riverside Council of Governments (WRCOG), the Coachella Valley Association of Governments (CVAG), and the San Bernardino Council of Governments (SBCOG), that encompasses San Bernardino County, Riverside County, and all of the jurisdictions within the region. These organizations have joined together to establish locally administered, designed, and delivered energy efficiency (EE) programs.

I-REN sees a critical need to accelerate action in the region, catalyzing current local government activities related to climate change through targeted and tailored energy efficiency programs and layering other efforts to increase impact.



I-REN Business Plan

In 2021, WRCOG on behalf of I-REN submitted its first Business Plan to the California Public Utilities Commission (CPUC) to become an authorized program administrator for energy efficiency services in the Inland Empire, covering all of San Bernardino and Riverside Counties. The Business Plan outlines anticipated activities and the development of three main program areas for the REN for the initial round of ratepayer funding from the CPUC for \$65 million for 2021 to 2027.

Historically, the Inland Empire has faced challenges in participating fully in energy efficiency and advanced energy programs, training, and funding due to its geography and more dispersed population. I-REN's approval by the CPUC to be a locally administered regional energy network will enable a transformation for the region. The \$65 million dollars in ratepayer funding will help to provide the region with robust programs to ensure ratepayers in this region can become active participants in meeting California's energy efficiency goals.



The Business Plan provides a vision and goals for services in Workforce Education & Training, Codes & Standards, and Public Sector programs. The Business Plan is the foundation for the programs and funding, but is separate from the organizational goals and vision that is expanded upon in this Strategic Plan.

Introduction

I-REN Program Areas

Public Sector



The I-REN Public Sector offering strives to establish robust and comprehensive wrap-around services for the local jurisdictions in the I-REN territory. Briefly, this includes Strategic Energy Planning to help identify opportunities, strategic investments in municipal and community buildings, establishing a Building Upgrade Concierge (BUC) service with digital and person-to-person technical assistance, and building upgrade incentives. I-REN member agencies have developed extensive networks and expertise with key partners in the public sector across the region, and plan to leverage this history to continue facilitating energy efficiency upgrades. With 52 cities, 78 unincorporated county areas, and 17 tribal areas, there are significant needs. Further, the local governments tend to be under-resourced and lack the capacity, knowledge, and ability to effectively update their buildings or to enforce codes and standards. This will fill a gap in energy efficiency services.

Codes & Standards



I-REN will implement a well-rounded set of activities related to support improved codes and standards compliance and enforcement. This effort will support local government as well as industry professionals. I-REN includes many smaller jurisdictions that face significant challenges with codes and standards enforcement and compliance. I-REN sees an opportunity to leverage its strong network with public sector staff to offer resources and support to further code compliance and enforcement. This effort will target both local governments and industry actors to create better communications, protocols, and systems for increased efficiency.

Workforce Education & Training

The I-REN team will work closely with local providers, as well as coordinating with other industry leaders statewide to bring more comprehensive and targeted training opportunities to the region. In addition, I-REN will work to improve workforce development and help enhance the availability of skilled workers and connections with businesses. Due in part to its geographic distance from major Metropolitan areas, the Inland Empire has historically had limited engagement in necessary workforce development opportunities. There is substantial demand but not a strong enough pool of skilled workers to meet that demand. The majority of IOU EE workforce training has typically taken place in the Los Angeles area or in border cities distant from

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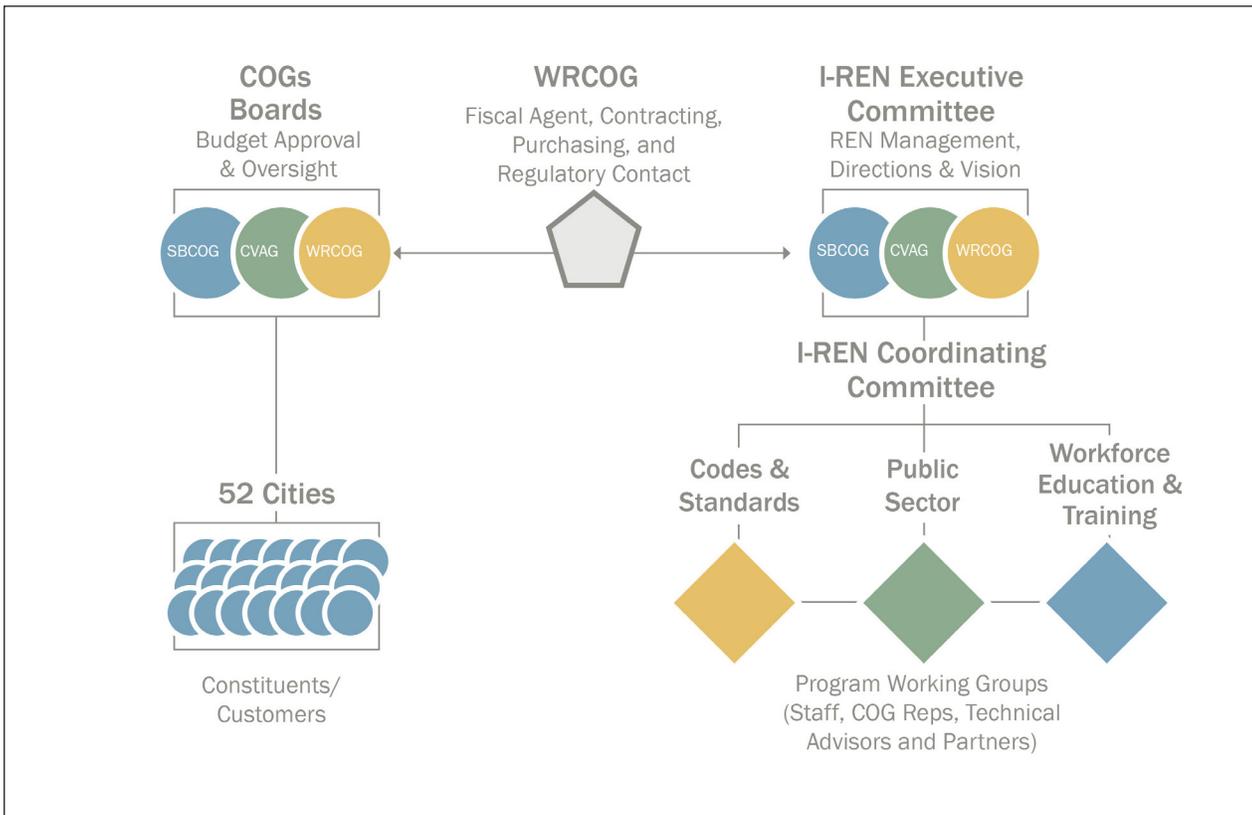
Introduction



many workers. I-REN sees an opportunity to strengthen its workforce by delivering trainings locally and using regional connections, especially with the Community Colleges, University of California (UCs), and California State Universities (CSUs), and local private universities with the knowledge to engage and build workforce networks. Through these activities I-REN can help bridge the divide between training providers, job seekers, and employers to support the growth of a clean energy workforce and economy in the Inland Empire.

I-REN Organization & Leadership

I-REN is a fully integrated, local government-led organization with equal participation and leadership by three (3) Councils of Government. The graphic below illustrates I-REN's structure and how it connects its 52 member cities to the oversight and management of the REN. A key aspect of I-REN is the 7 member Executive Committee comprised of elected leaders, representing the 52 cities. They oversee the three (3) program areas and Program Coordinating Committees which include, staff and stakeholders.



Strategic Plan



Strategic Plan Purpose and Need

The I-REN 2023-2027 Strategic Plan provides a path forward for the organization over the next 5 years with a focus on building a robust foundation for growth and innovation. This Strategic Plan explores how the organization, and its resources, services, and programs will meet future needs for the Inland Empire counties and member agencies. The Strategic Plan is an action-oriented plan with strategies and tactics to achieve the organization’s objectives, including a framework for programs to evolve to meet bigger goals related to equity market transformation.

Process

The strategic planning process took place from December 2022 to September 2023 and was a collaboration between I-REN staff and the Executive Committee, with strategic planning support from a consultant, BluePoint Planning. The process kicked off with a survey to stakeholders and one-on-one interviews with key decision makers in the region. The process assessed I-REN’s strengths, weaknesses, threats, and opportunities and considered its role in the region as a new organization, and how to most effectively deliver services and resources in a equal manner. The next step was to develop a five-year Strategic Framework with key goals, strategies and tactics. The final step included prioritizing the strategies and developing a detailed implementation plan for staff.



Strategic Plan Framework

I-REN MISSION

To actively participate in California's Clean Energy initiatives and build a stronger clean energy economy and community.

OUR VISION

I-REN's vision is to connect residents, businesses, and local government to a wide range of energy efficiency resources to increase energy savings and equitable access throughout San Bernardino and Riverside Counties.

ORGANIZATIONAL GOALS

Goal 1.

Cohesive Region

I-REN operates as a cohesive regional program and will make available and distribute benefits equally through the region with the fair allocation of resources and services to the COGs and member agencies.



Goal 2.

First 2 Years

I-REN will focus on the delivery of positive and tangible impacts to the region through a successful launch and roll-out of programs.



Goal 3.

Awareness & Relationships

I-REN will actively be involved with all member agencies, tribes, special districts, and partners, and will strive to engage them as active participants.



Goal 4.

Internal Organization

I-REN will be an effective and efficient organization, characterized by agility, responsiveness, and accountability.



OBJECTIVES

Ensure that the COGs and member agencies benefit from REN programs and funds as equally as possible.

Ensure the effective deployment of programs, services, and early wins.

Create lasting and valuable relationships with jurisdictions throughout the region to ensure program uptake and participation.

The internal I-REN team has capacity, is prepared, and is able to effectively to manage and drive the launch of the I-REN programs.

STRATEGIES

1.1 Effective Governance

1.2 Data Sharing and Monitoring

1.3 Program Design and Delivery

2.1 Program Priorities

2.2 Roll-Out Strategy

2.3 Reporting and Performance

3.1 Regional Outreach, Education, and Engagement

3.2 Community Roundtables

3.3 Dedicated Partnerships

3.4 State Actors

4.1 Strong Organization

4.2 Regulatory Capacity

4.3 Performance Management

Priorities and Key Activities



Equal Benefits Region-Wide

Establish tools and approaches to offer equal benefits for COGs and member agencies

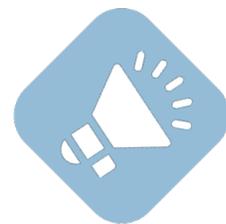
- Establish a collaborative and productive working relationship with the Executive Committee
- Work closely with implementers and the community to ensure that program design considers the unique and varied needs of the entire region



Program Development and Launch

Ensure successful launch of programs in first 2 years to help build I-REN's momentum.

- Establish the Fellows Program with placements in multiple jurisdictions
- Identify program priorities and essential enabling activities to launch programs that are relevant and responsive
- Focused program development and roll out in areas with the greatest need, particularly in disadvantaged and underserved communities



Regional Engagement

Ensure that the diverse voices of the region are engaged and part of the development of the programs

- Develop and complete Education, Outreach, and Engagement Plan.
- Establish and launch Community Roundtables to create champions and thought leaders for program development
- Create materials, communication tools, and a website that succinctly and effectively relays key information to stakeholders



Strong and Successful Organization

Create the foundation for an effective and responsive organization.

- Define roles and responsibilities, protocols, and resources for making I-REN and its programs successful
- Build capacity and ability to ensure regulatory requirements are met

Goal 01

Cohesive Region



I-REN operates as a cohesive regional program and will make available and distribute benefits equally through the region with the fair allocation of resources and services to the COGs and member agencies.

Objective Ensure that the COGs and member agencies recognize the strength of the regional program and benefit from REN programs and funds as equally as possible and in line with CPUC guidance.

Desired Outcomes

- The COGs and members begin to identify as a region rather than individual jurisdictions.
- Staff resources are allocated fairly and available to all regions equally.
- Building Upgrade Concierge (BUC) platform is deployed and available for all member agencies.
- Uptake of programs and services is monitored and shared with transparent reporting to the Executive Committee.
- Community voices are representative of the region and inform the program design.

STRATEGY 1.1. Work collaboratively and proactively with the I-REN Executive Committee (EC) to inform budget-making, resource allocation, and program development, ensuring responsiveness and agile decision-making.

- 1.1.1 Conduct an annual strategic planning session with the Executive Committee to identify progress, opportunities, and any strategic elements for the Executive Committee to address.
- 1.1.2 Establish clear budgeting processes to enable effective engagement by Executive Committee and enable appropriate authority for staff implementation.
- 1.1.3 Document protocols and processes to streamline critical approvals and activities that cannot wait for quarterly Executive Committee meetings with existing documentation.
- 1.1.4 Develop onboarding education process and materials for orienting new Executive Committee members and other key partners.

Goal 01

Cohesive Region



STRATEGY 1.2. Utilize the Building Upgrade Concierge (BUC) platform to provide an online dashboard and information-sharing portal that allows I-REN members to learn about and track opportunities, monitor program uptake, and find events and new activities.

- 1.2.1 Establish clear protocols and processes for maintaining and updating shared database and communicating changes.
- 1.2.2 Provide regular communications to members to encourage them to use the BUC platform and to participate and learn about opportunities for their communities.
- 1.2.3 Ensure there are trained and dedicated staff to manage and support the BUC platform at the regional level and agency level.

STRATEGY 1.3. Ensure that program design and delivery consider the needs of the entire region, providing focused support for areas with the greatest need and tracking progress towards goals and is in line with the CPUC.

- 1.3.1 Gather information, data, and details related to relevant policies and procedures, and engage with member agencies to identify needs and interests to support equal access to program benefits.
- 1.3.2 Identify methodology and mapping for high-need member agencies and communities that should receive additional support to ensure access to services in alignment with CPUC equity metrics.
- 1.3.3 In concert with Community Roundtables (Connect to S3.4,) develop and design outreach and engagement approaches to ensure access, limit administrative burden, and to support flexibility in serving various needs.
- 1.3.4 Work with implementers to establish contract performance metrics aligned to overall CPUC and program metrics, with a focus on fair distribution of benefits. (Connect to S2.3)
- 1.3.5 Form guiding principles for management among COGs around contract compliance, metrics, benchmark parameters, and contract review.
- 1.3.6 Ensure all parties support and provide accurate reporting, and analyze trends to improve KPIs, and identify other contributing variables to program success.
- 1.3.7 Create and utilize marketing and branding guidelines.

Goal 02

First 2 years



I-REN will focus on the delivery of positive and tangible impacts to the region through a successful launch and rollout of programs.

Objective

Ensure the effective deployment of programs and services and early wins in the initial phase of 2024-2026.

Desired Outcomes

- Funds expended
- Number of training participants
- Number of fellows placed
- Number of local agencies served
- Number of projects enrolled

STRATEGY 2.1. I-REN staff, in collaboration with the Executive Committee and the implementers, will identify program priorities and essential enabling activities to launch programs.

- 2.1.1 Identify and prioritize disadvantaged communities and underserved areas that need assistance the most, in line with CPUC guidance. (Connected to S1.3.2)
- 2.1.2 Identify gaps and needs for data and conduct market research and engagement to make informed decisions about program priorities.
- 2.1.3 Determine program areas that have potential for greatest impact and ease of implementation to focus on first.
- 2.1.4 Operationalize performance feedback to institute changes to programs as needed and possible to address misalignment or inability to meet proposed outcomes.
- 2.1.5 Proactively follow up with leads from implementers and foster relationships, promoting feedback and flexibility in response.

Goal 02

First 2 years



STRATEGY 2.2. I-REN staff will work with implementers and program teams to establish feasible roll-out schedules and process for each program launch and aggressively work to meet those timelines.

- 2.2.1 Complete implementer onboarding by the first quarter of 2024 and ensure there are clear roles and responsibilities for all involved.
- 2.2.2 Establish Community Roundtable and engagement process by the end of 2024.
- 2.2.3 Define and meet milestones, timeframes, and goals of each program action item to ensure early wins.
- 2.2.4 Establish effective communication channels and protocols with CPUC and other key actors.

STRATEGY 2.3. Establish transparent reporting and performance metrics to demonstrate success and alignment with the CPUC, member agencies, and Stakeholders. (Connect to S1.3.4)

- 2.3.1 Determine appropriate metrics to reach outcomes identified in the business plan based on current CPUC regulations.
- 2.3.2 Develop consistent reports and metrics based on available program data and QA/QC results to ensure accuracy.
- 2.3.3 Align the expectations and interests of COGs with program implementers work plans.
- 2.3.4 Maintain consistent communication with consultant team and implementers, including weekly meetings, as needed, to ensure accountability and coordination of scheduling services.
- 2.3.5 Establish regular check in and progress meetings and conduct routine contract performance review.

Goal 03

Awareness & Relationships



I-REN will actively engage with all member agencies, tribes, special districts, and partners and strive to establish them as active participants.

Objective

Create lasting and valuable relationships with jurisdictions throughout the region to ensure program engagement uptake and participation.

Desired Outcomes

- Engagement and Outreach Plan (EOP) is adopted and utilized routinely
- All I-REN member agencies are aware and understand what I-REN does and I-REN is a trusted subject matter expert
- Number of state and other key stakeholders have heard of I-REN
- I-REN is a relevant influencer and known entity at the state level
- Community roundtables are established and operational

STRATEGY 3.1. Conduct meaningful outreach and education activities throughout the region, building relationships with each member agency, and making sure that those who are typically underserved can participate and learn about I-REN program opportunities.

- 3.1.1 Develop an EOP that includes equity considerations with an implementation plan to monitor and measure the effectiveness of the engagement tactics, which identifies key audiences, reach methods, and best approaches for long-term relationship building.
 - 3.1.1.1 Measure the effectiveness of EOP, including social media campaigns.
 - 3.1.1.2 Utilize outreach and social media outlets to help connect and find additional channels for engagement.
- 3.1.2 Develop and operationalize a branding strategy and marketing plan that includes simple, clear, and tailored messaging and communication materials and identifies the direct benefit of the programs for all audiences. (what they care about, a compelling why).
- 3.1.3 Actively engage and identify member pain points and concerns when developing programs.
- 3.1.4 Develop a feedback loop for energy efficient topics and issues in the region, helping solve problems directly and collaboratively.
- 3.1.4 Develop and maintain a robust website and engagement platform to deliver ongoing and consistent information and data to the region in conjunction with social media channels.
- 3.1.5 Ensure accessibility through translating material in multiple languages and providing appropriate accommodations to engage as many people as possible.
- 3.1.6 Conduct an annual/periodic program focused survey(s) to measure awareness and needs. (Connected to S4.3.4)

Goal 03

Awareness & Relationships



STRATEGY 3.2. Identify and collaborate with community champions and thought leaders to be the voice of the program empowering the community through establishing and managing Community Roundtables.

- 3.2.1 Establish program specific Community Roundtables in accordance with the Memorandum of Agreement.
- 3.2.2 Determine a process for Community Roundtables to inform program design at launch and overtime.
- 3.2.3 Develop a compensation policy for roundtable members, including community-based organizations, community members, and outreach partners who are representing disadvantaged community audiences and equity goals, appropriately for their time. Set up the process with contractors and implementers.
- 3.2.4 Update participants, roles, and responsibilities of the Community Roundtables over time to reflect priorities and needs.

STRATEGY 3.3. Utilize dedicated staff and resources to develop and maintain relationships and partnerships with members, potential partners, and other stakeholders throughout the region.

- 3.3.1 Establish a Regional Partnership Plan that identifies partner priorities, gaps, and needs in alignment with program priorities, as well as roles and responsibilities for I-REN staff.
 - 3.3.1.1 Identify vital partnerships for each sector, including with community-based organizations, higher education institutions, workforce investment boards, energy employers, industry experts, contractors, architecture and engineering firms, associations, assessors, and unions.
 - 3.3.1.2 Develop relationships with high schools and youth organizations to develop pathways into green jobs and programs.
 - 3.3.1.3 Leverage COG contacts and resources.
 - 3.3.1.4 Continue to work with other agencies and partners to bring non-ratepayer resources and funds to the region and fill gaps
- 3.3.2 Develop and maintain contact relationship management (CRM) system to map and identify partners and track by program and region.
- 3.3.3 Identify staff members to steward partnership development with support from all I-REN staff and the Executive Committee as appropriate.

Goal 03

Awareness & Relationships



STRATEGY 3.4. Expand relationship development to state actors at the CPUC, CEC, Legislature, other Program Administrators, and beyond to build the I-REN stature and influence beyond the region, and act as a conduit to share information back to the region.

- 3.4.1 Identify and train state partnership lead(s) and support staff who are responsible for monitoring various channels for information and connecting the appropriate I-REN staff to engagement opportunities.
- 3.4.2 Explore opportunities for I-REN staff members to join board or commission meetings, and webinars with state organizations to ensure active participation in decision-making.
- 3.4.3 Research the landscape to determine the connections and ensure staff training on upcoming legislative matters is up to date.
- 3.4.4 Utilize Civic Well for regional messaging about state activities to ensure state people are at the table.
- 3.4.5 Maintain membership and actively participate in CECC, LGSEC, and CAEECC.
- 3.4.6 Work closely with the other RENs to share best practices, coordinate regulatory responses, and overall increase the impact and influence of the local government program administrators.

Goal 04

Internal Organization



I-REN will be an effective and efficient organization, characterized by agility, responsiveness, and accountability.

Objective

The internal I-REN team has capacity, is prepared, and is able to effectively manage and drive the launch of the I-REN programs.

Desired Outcomes

- Budget goals are met
- Participation targets are met
- Organizational survey results indicate the I-REN is responsive, relevant and important
- I-REN meets staff and capacity requirements

STRATEGY 4.1. Foster a strong organization around a clear and central mission, with defined roles and responsibilities for making the I-REN and its programs successful.

- 4.1.1 Ensure that the administrative process and approval systems are in place to enable agile and streamlined decision-making by the end of 2023 without undue burden.
- 4.1.2 Provide resources to increase staff knowledge about the program topics and keep up to date through internal training on equity and DEI.
- 4.1.3 Identify clear roles, and responsibilities while building the team through organizational meetings, effective onboarding, training, hiring and maintaining staff capacity.
 - 4.1.3.1 Provide job description with roles and responsibilities.
 - 4.1.3.2 Develop and maintain organizational chart.
 - 4.1.3.3 Establish file sharing and communication protocols.
 - 4.1.3.4 Create specific and detailed work plans.

Goal 04

Internal Organization



STRATEGY 4.2. Build capacity and ability to ensure that regulatory requirements are met and become standards of operations.

- 4.2.1 Train and support staff in learning and building capacity to work with regulators.
- 4.2.2 Engage with other RENs, and CALREN to understand key issues and to build capacity and strength in the RENs position.
- 4.2.3 Create templates and resources to make responses consistent and simpler.
- 4.2.4 Routinely subscribe, follow, and read information from CPUC, CEC, and CAEECC.

STRATEGY 4.3. Annually review organizational performance and provide a routine means to make changes and updates to systems, processes, and overall operations as needed.

- 4.3.1 Develop and manage internal organization budget.
- 4.3.2 Maintain and update the strategic plan annually.
- 4.3.3 Engage with internal stakeholders to understand areas for improvements and changes.
- 4.3.4 Conduct an annual member survey to measure effectiveness with member agencies. (Connected 3.1.6)

Acknowledgments

Western Riverside Council of Governments (WRCOG)

WRCOG's goal is to unify Western Riverside County so that it can speak with a collective voice on important issues that affect its members. Representatives from 18 cities, the Riverside County Board of Supervisors, and the Eastern and Western Municipal Water Districts, have seats on the WRCOG Executive Committee, the group that sets policy for the organization.

San Bernadino Council of Governments (SBCOG)

SBCOG's purpose is to speak with a collective voice on important issues that affect its member agencies. Representatives from 24 cities and towns, and the San Bernardino County Board of Supervisors have a seat on the SBCOG Board of Directors.

Coachella Valley Association of Governments (CVAG)

CVAG is the regional planning agency coordinating government services within the Coachella Valley. By providing solutions to the common issues of the local governments and tribes that are its members, CVAG promotes a better quality of life and balanced growth for residents of Central and Eastern Riverside counties.

I-REN Executive Committee

Mayor Oscar Ortiz, City of Indio
Mayor Deborah Robertson, City of Rialto
Supervisor Curt Hagman, County of San Bernadino
Councilmember Art Bishop, Town of Apple Valley
Councilmember Jacque Casillas, City of Corona
Mayor Chris Barajas, City of Jurupa Valley
Mayor Pro Tem Crystal Ruiz, City of San Jacinto

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