



Inland Regional Energy Network I-REN Executive Committee

AGENDA

**Tuesday, April 15, 2025
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**

Members of the public are welcome to participate remotely from any location. Committee member participation is limited to locations that are listed on the published agenda.

[Public Zoom Link](#)

**Meeting ID: 886 4326 1379
Passcode: 585575
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) 405-6706. 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 Lucy Felix at least 72 hours prior to the meeting at (951) 405-6706 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 (Oscar Ortiz, 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 agenda 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 February 18, 2025, I-REN Executive Committee Meeting

Requested Action(s): 1. Approve the Action Minutes from the February 18, 2025, I-REN Executive Committee meeting.

B. First Amendment to Professional Services Agreement with Frontier Energy for Implementation Services

Requested Action(s): 1. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a First Amendment to the Professional Services Agreement between WRCOG and Frontier Energy for staff augmentation services to support ongoing implementation of I-REN's programs in an amount not-to-exceed \$2,248,519.00, for a term through December 31, 2027.

C. First Amendment to Professional Services Agreement with The Energy Coalition for Public Sector Services

Requested Action(s): 1. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a First Amendment to the Professional Services

Agreement between WRCOG and The Energy Coalition for staff augmentation services to support ongoing implementation of I-REN's Public Sector programs in an amount not-to-exceed \$17,762,942.00, for a term through December 31, 2027.

D. First Amendment to Professional Services Agreements for On-Call Workforce, Education & Training services with The Energy Coalition and Riverside Community College Districts

Requested Action(s):

1. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a First Amendment to the On-Call Professional Services Agreement between WRCOG and The Energy Coalition for staff augmentation services to support implementation of workforce assessments recommendations in an amount not-to-exceed \$735,000, for a term through December 31, 2027.
2. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a First Amendment to the 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 \$600,000, for a term through December 31, 2027.

E. Memorandum of Understanding with California State University of San Bernardino for Evaluation, Measurement, and Verification Studies

Requested Action(s):

1. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a Memorandum of Understanding between WRCOG and the California State University of San Bernardino for I-REN's Evaluation, Measurement, and Verification Studies in an amount not-to-exceed \$120,000, for a term through December 31, 2027.

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. I-REN Energy Efficiency Annual Report for Calendar Year 2024

Requested Action(s):

1. Receive and file.

B. I-REN 2023-2027 Strategic Plan Update

Requested Action(s):

1. Receive and file.

7. REPORT FROM THE EXECUTIVE COMMITTEE CHAIR

Oscar Ortiz, CVAG

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, May 20, 2025, at 2:00 p.m., in WRCOG's office 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 gases

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 meeting of the I-REN Executive Committee was called to order by Chair Oscar Ortiz at 2:00 p.m. on February 18, 2025, at WRCOG's office.

2. PLEDGE OF ALLEGIANCE

Committee member Crystal Ruiz, led the Committee members and guests in the Pledge of Allegiance.

3. ROLL CALL

CVAG

- City of Indio - Oscar Ortiz (Chair)

SBCOG

- City of Grand Terrace - Bill Hussey
- County of San Bernardino - Curt Hagman*

WRCOG

- City of San Jacinto - Crystal Ruiz

*Arrived after Roll Call

4. PUBLIC COMMENTS

There were no public comments.

5. CONSENT CALENDAR

RESULT:	APPROVED AS RECOMMENDED
MOVER:	Ruiz
SECONDER:	Hussey
AYES:	Ortiz, Hussey, Ruiz

A. Action Minutes from the January 21, 2025, I-REN Executive Committee Meeting

Action:

1. Approved the Action Minutes from the January 21, 2025, I-REN Executive Committee meeting.

6. REPORTS / DISCUSSION

A. Energy Resilience and Microgrids

Action:

- 1. Received and filed.

B. California Public Utilities Commission Application Process for Funding for Program Years 2028 - 2035

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

Action:

- 1. Authorized staff to continue the development of the 2028 Business Plan for the Public, Codes & Standards, and Workforce Education & Training Sectors and direct staff to return this item to the April 2025 meeting future meeting for a discussion of possible inclusion of additional sectors.

C. I-REN 2023-2027 Strategic Plan Update

Action:

- 1. Received and filed.

D. Workforce Education & Training Sector I-REN Energy Fellowship Program Activities Update

Action:

- 1. Received and filed.

7. REPORT FROM THE EXECUTIVE COMMITTEE CHAIR

Chair Ortiz had nothing to report.

8. ITEMS FOR FUTURE AGENDAS

There were no requests for items for future agendas.

9. GENERAL ANNOUNCEMENTS

There were no general announcements.

10. NEXT MEETING

The next I-REN Executive Committee meeting is scheduled for Tuesday, April 15, 2025, at 2:00 p.m., in WRCOG's office located at 3390 University Avenue, Suite 200, Riverside.

11. ADJOURNMENT

The meeting was adjourned at 3:17 p.m.



Inland Regional Energy Network I-REN Executive Committee

Staff Report

Subject: First Amendment to Professional Services Agreement with Frontier Energy for Implementation Services

Contact: Benjamin Druyon, WRCOG Program Manager, bdruyon@wrcog.us, (951) 405-6727

Date: April 15, 2025

Recommended Action(s):

1. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a First Amendment to the Professional Services Agreement between WRCOG and Frontier Energy for staff augmentation services to support ongoing implementation of I-REN's programs in an amount not-to-exceed \$2,248,519.00, for a term through December 31, 2027.

Summary:

Frontier Energy's existing contract ends on December 31, 2025. I-REN has relied on Frontier's services more extensively than initially expected and will need their continued support through the remainder of the current Business Plan cycle, which ends December 31, 2027. As the next Business Plan is being developed, uninterrupted access to Frontier's services is essential.

Discussion:

Background

Prior to the Inland Regional Energy Network's (I-REN) existence, the Western Riverside Council of Governments (WRCOG), the Coachella Valley Association of Governments (CVAG), and the San Bernardino Council of Governments (SBCOG) partnered together to begin the effort of forming a Regional Energy Network to serve the counties of Riverside and San Bernardino. Part of that effort included hiring a consultant, Frontier Energy, to help guide and implement the steps necessary to accomplish this momentous feat. Once I-REN was formally established, it required implementation and regulatory assistance, so WRCOG, as lead administrator, and Frontier Energy entered into a new Professional Services Agreement (PSA) for implementation services.

The original PSA with Frontier Energy was for a term of March 8, 2022, to December 30, 2025, with no more than two options to renew or amend. The compensation under the 2022 PSA is not to exceed \$793,701.

WRCOG proposes to amend the original PSA in order to increase the term and compensation to a not-to-exceed amount of \$2,248,519.00, in order to continue providing uninterrupted services through

December 31, 2027.

The proposed First Amendment would allow Frontier Energy to continue to meet the needs of I-REN for regulatory consulting support related to the following items, which are detailed in the attached document:

- Consulting services within the scope of the original PSA, for which I-REN requests additional ongoing support.
- Regulatory requirements which have evolved since the signing of the original PSA .

Present Situation

As more agencies in Riverside San Bernardino Counties become aware of I-REN's offerings, and growth trends continue to increase, the below ongoing services are being utilized more than previously anticipated.

Accounting Services: Beginning in mid-2023, at WRCOG's request, Frontier Energy began providing accounting consulting services for I-REN related to California Public Utilities Commission (CPUC) requirements for tracking and reporting of ratepayer-funded energy efficiency (EE) program expenditures. Staff proposes to continue those services through December 31, 2027, with activities that may include but are not limited to the following:

- Development and implementation of processes and tools to support WRCOG with EE program expenditure tracking in its role as I-REN administrative lead agency.
- Training for WRCOG, CVAG, and SBCOG staff, and I-REN's EE program implementers and other vendors on processes and tools for invoicing and tracking EE program expenditures.
- Processing and compilation of I-REN expenditures into CPUC required reporting format.
- Consulting on best practices for expenditure tracking and reporting processes and tools.

Strategic Planning: At WRCOG's request, Frontier subcontractor BluePoint Planning proposes to facilitate an in-person workshop to assist I-REN in refining its goals and priorities for 2025-2027. The workshop will involve several stages of planning and execution, including:

1. Coordination and Workshop Planning: Discuss and confirm process, schedule, objectives, and goals for the workshop.
2. Issues Survey: Develop and administer a survey to I-REN members to inform the workshop agenda.
3. Workshop: Half-day, in-person for I-REN member agencies, including set-up, workshop, tear down, and BluePoint travel.
4. Follow-up and summary notes.
5. Frontier Energy Attendance: Preparation and travel costs for Frontier Energy staff.

Per the Implementation Plan, the Strategic Plan is to be updated on an annual basis. The Strategic Planning effort is proposed to be repeated annually for the term of the Agreement.

Evaluation, Measurement, and Verification (EM&V): Frontier Energy is proposing Evaluation, Measurement, and Verification (EM&V) Studies designed to inform program target setting and value metrics, and to identify opportunities for enhanced data and measurement collection. Additionally, EM&V findings will assist the Portfolio Administrator (PA) in assessing an implementer's performance

against established program goals, CPUC metrics, and PA-determined value metrics. The outcomes of near-term EM&V activities will also inform the Business Plan for 2028-2035, which is to be submitted by February 2026. The contract amendment includes a budget to support.

Regulatory Requirements for Stakeholder Engagement and Reporting: CPUC Decision (D) 23-06-055 introduced an unprecedented number of new regulatory requirements, many of which require the EE portfolio administrators to work together and with stakeholders to prepare reports and advice letters, which will then result in additional regulatory requirements upon CPUC approval. WRCOG proposes to continue supporting these efforts through December 31, 2027.

These stakeholder activities include but are not limited to the following, which are associated with Ordering Paragraphs (OPs) in D.23-06-055:

- OP 2: Joint PAs statewide program portfolio assessment process
- OP 11: Clarification of Equity & Market Support Indicators and Proposed Changes to Common Metrics
- OP 19: Non-energy benefit indicators for equity segment
- OP 23: Demographic Participation Information
- OP 24: Community Engagement Indicators
- OP 25: Equity & Market Support Goal Constructs: Attitude, Knowledge, Awareness, Behavior Indicators
- OP 32: Program Overlap
- OP 31: Community Programs

2028–2035 Strategic Business Plan and 2028–2031 Portfolio Plan: I-REN’s next Business Plan filing is due in February 2026. Frontier Energy and BluePoint Planning propose to begin this work early in 2025, with high level tasks including but not necessarily limited to overall project coordination, virtual listening sessions with key stakeholders to inform program updates and/or new programs, as well as support with program ideation, budgeting, savings, and cost-effectiveness analysis, drafting content, and finalizing content for filing.

This work will require significant effort due to at least two major paradigm shifts that have occurred in the EE landscape since the time of I-REN’s original Business Plan filing in February 2021.

- New Application Requirements
 - In May of 2021, just a few months following I-REN’s first Business Plan submittal, the CPUC issued a decision (D.21-05-031) with major implications for the process to apply for ratepayer funding to offer EE programs as a PA. The Decision established a new four-year filing cycle and bifurcated the Business Plan filing into two separate exhibits that must be filed as part of an application. The Decision also required more granular detail to be provided as part of the application; where the previous Business Plan template was filed with sector-level plans for the EE portfolio, the new template additionally requires program-level detail. The two narrative exhibits that are now required (in addition to a spreadsheet with savings forecasts, budgets, and metrics) are described below:
 - A business plan to cover an eight-year period. The business plan shall serve as a strategic plan for the energy efficiency efforts of the program administrator, and shall contain sector-level strategies, metrics, and an eight-year budget.
 - A four-year program portfolio, beginning with program year 2024. This portion of the

application shall contain detailed sector and program strategies; annual budgets, totaling to a four-year revenue requirement; cost-effectiveness showings over the four-year period; and implementation plans, or links to them, for all programs that are currently operating or planned to operate during the four-year portfolio period, with the exception of third-party programs where the contract has not yet been awarded.

- **Affordability Crisis for CA Ratepayers**
 - California is facing a crisis of energy bill affordability, and that has proved in 2024 to have significant implications for ratepayer-funded EE programs which will continue in the coming years. Two recent results of this crisis (Assembly Bill 3264 and the Governor's Executive Order N-5-24) may have direct impacts on I-REN, and the full ramifications are not yet known as of November 2024.
 - I-REN and all other PAs will be facing scrutiny when they reapply for ratepayer funding for EE programs. Because I-REN filed its first Business Plan in 2021, prior to D.21-05-031, and the other PAs filed in 2022, I-REN is currently authorized for funding through 2027 only. The other PAs are tentatively authorized through 2031. Given these facts, a concerted effort is warranted for I-REN's next Business Plan filing to demonstrate the value that I-REN has delivered with its first round of funding in 2022-2027, and can continue to provide in its next funding period if approved.

For these reasons, staff's recommendation is to recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute an amendment to the PSA with Frontier Energy for Implementation Services through 2027.

Prior Action(s):

None.

Financial Summary:

Activities related to the amendment to the PSA with Frontier Energy will be added to the Fiscal Year 2025/2026 and subsequent budgets once approved by the WRCOG Executive Committee.

Attachment(s):

[Attachment 1 - First Amendment to the PSA with Frontier Energy](#)

**FIRST AMENDMENT TO
PROFESSIONAL SERVICES AGREEMENT
BETWEEN
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
AND
FRONTIER ENERGY, INC.**

1. PARTIES AND DATE.

This First Amendment is made and entered into this 5th day of May 2025, by and between the Western Riverside Council of Governments, a California public agency (“WRCOG”) and Frontier Energy, Inc., a California Corporation and professional services firm delivering energy efficiency, market transformation, and transportation solutions through technical consulting, program development and implementation, and technology development (“Consultant”). WRCOG and Consultant are sometimes individually referred to as “Party” and collectively as “Parties.”

2. RECITALS.

2.1 Master Agreement.

WRCOG and Consultant have entered into that certain Professional Services Agreement dated March 30, 2022 (“Master Agreement”).

2.2 First Amendment.

WRCOG and Consultant desire to enter into this First Amendment for the purposes of extending the term of the Master Agreement, updating exhibits, and providing additional compensation for ongoing energy efficiency support as it pertains to WRCOG’s Regional Energy Network development (“Services”).

3. AMENDMENTS.

3.1 Extension of Agreement Term.

Through this Amendment, the Parties hereby exercise their first option to renew the Master Agreement for two (2) additional years. The term of the Master Agreement is hereby extended to December 31, 2027, with no more than one (1) remaining option to renew or amend unless earlier terminated as provided in the Master Agreement.

3.2 Additional Compensation.

Per Section 3.3.1 of the Master Agreement, the original compensation amount pursuant to the Agreement shall not exceed Seven Hundred Ninety-Three Thousand Seven Hundred One Dollars (\$793,701.00). This amendment increases the total compensation amount for the Services performed under the Agreement and this First Amendment to a total not to exceed amount of Two Million Two Hundred Forty-Eight Thousand Five Hundred Nineteen Dollars (\$2,248,519.00) without written approval of WRCOG’s Executive Director. Work shall be performed in manner that is consistent with the Scope of Services, Schedule of Services and

Compensation set forth in Exhibits “A”, “B” and “C”, respectively, to the Master Agreement. The Services shall be more particularly described in the individual Task Order issued by WRCOG or its designee. No Services shall be performed unless authorized by a fully executed Task Order.

3.3 Replacement of Exhibits.

Exhibits “A”, “B”, and “C” of the Master Agreement are hereby deleted and replaced with Exhibits “A”, “B”, and “C” attached hereto this First Amendment. Said exhibits are hereby incorporated into this First Amendment by this reference.

3.4 Continuation of Existing Provisions.

Except as amended by this First Amendment, all provisions of the Master Agreement, including without limitation the indemnity and insurance provisions, shall remain in full force and effect and shall govern the actions of the Parties under this First Amendment.

3.5 Counterparts.

This First Amendment may be executed in duplicate originals, each of which is deemed to be an original, but when taken together shall constitute one instrument.

3.6 Electronic Delivery of Agreement; Electronic Signatures.

A manually signed copy of this First Amendment which is transmitted by facsimile, email or other means of electronic transmission shall be deemed to have the same legal effect as delivery of an original executed copy of this First Amendment for all purposes. This First Amendment may be signed using an electronic signature.

[Signatures on the following page]

**SIGNATURE PAGE TO
FIRST AMENDMENT TO
PROFESSIONAL SERVICES AGREEMENT
BETWEEN
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
AND
FRONTIER ENERGY, INC.**

IN WITNESS WHEREOF, the Parties hereto have made and executed this First Amendment as of the date first written above.

WRCOG

WESTERN RIVERSIDE COUNCIL
OF GOVERNMENTS

By: _____
Dr. Kurt Wilson
Executive Director

CONSULTANT

Frontier Energy Inc.

By: Jean Krausse
Jean Krausse
Vice President

Approved to Form:

By: _____
Steven C. DeBaun
General Counsel

ATTEST:

By: Jeremy Springer
Jeremy Springer
Chief Financial Officer

Exhibit "A"

SCOPE OF WORK

The Coachella Valley Association of Governments (CVAG), San Bernardino Council of Governments (SBCOG), and the Western Riverside Council of Governments (WRCOG) will need the Consultant to assist with the development and implementation of a Regional Energy Network (REN) within San Bernardino County and Riverside County. This project will need the Consultant to assist with the drafting, reviewing, and submitting of an Implementation Plan to the CPUC; assisting with the development of the Mid Cycle and True Up Advice Letters MCAL and TUAL); assisting with the development of Joint Cooperation Memos (JCMs) that will involve coordination between the IOUs and other PAs in I-RENs service territory; drafting / review of energy efficiency metrics filing(s); and assistance with various activities involved with implementation of the REN.

Specifically, CVAG, SBCOG, and WRCOG are expecting the Consultant to perform, but not be limited to performing, the following work:

I-REN Implementation Plan Development

1. **Implementation Plan Development** – Consultant will assist with development of the required Implementation Plan based upon final CPUC developed template. Implementation Plan support will include adjusting / refining calculations for energy savings and Total Resource Cost (TRC) that will be implemented in the RENs program and the COGs portfolio; developing program logic models and process flows; confirming appropriateness of applicable work papers, software tools and other supports required to claim savings. Work done will include but is not limited to:

- a. Facilitate kick-off meeting
- b. Facilitate routine meetings between Frontier and I-REN teams
- c. First Draft of Implementation Plan
- d. First Draft revisions
- e. Second Draft
- f. Second Draft revisions
- g. Coordination with I-REN teams
- h. Final Draft Implementation

I-REN Program Launch

1. **Mid Cycle and True Up Advice Letters (MCAL and TUAL)** – Consultant will assist with the development and submittal of the MCAL and TUAL. The work done on these advice letters includes providing feedback on program budgets, sector level metrics, and proposed program and portfolio changes. Work done will include but is not limited to:

- a. Facilitate coordination meetings
- b. Annual true-up forecast
- c. Update technical inputs, revise goals and savings forecast
- d. True-up portfolio components
- e. CPUC meeting support
- f. CPUC filing support as needed

2. **Metrics Filings** – Consultant will support the COGs with the final set of energy efficiency business plan metrics based upon the final CPUC required portfolio and sector level metrics and other REN identified metrics. Work done will include but is not limited to:
 - a. Coordination meetings
 - b. Select metrics, indicators, and alignment for segment level metrics
 - c. Data collection, gathering, and analysis
 - d. Calculate baseline
 - e. Identify and set targets
 - f. Quarterly collection and review
 - g. Annual calculation and reporting

3. **Utility Joint Cooperation Memo** – Consultant will assist with the development of the Joint Cooperation Memo between the lead agency, SCE, SoCal Gas, and other agencies where relevant.
 - a. Coordination meetings
 - b. JCM all parties meeting
 - c. Quarterly coordination - all parties
 - d. Annual updates - first draft
 - e. Annual updates - first revisions
 - f. Annual updates - second draft
 - g. Annual updates - second revisions
 - h. Finalize and file annual update

4. **Ongoing Support** – The Consultant will act as the lead consultant and will assist the COGs with support in the fields of administrative, technical, and regulatory, based upon the RENs ongoing needs. Ongoing support would include, but not be limited to:
 - Drafting RFPs for each sector and for related sector tasks (i.e. website development, software development, marketing and outreach, etc.).
 - Presentations to various agencies (i.e. Community Based Organizations, Faith Based Organizations, local governments, Chamber of Commerce Committees, and other committees.).
 - Coordination with other consultants for development and implementation of programs.
 - Services related to marketing, education, and outreach for the entire I-REN and individual sectors and subprograms.
 - Ongoing support will cover a wide array of activities, including:
 - CPUC monthly, quarterly and annual reporting
 - Implementation Plan updates
 - Metrics reporting
 - Representation, attendance and reporting at technical and regulatory meetings as identified and needed, including but not limited to:
 - Ad hoc Working Group meetings
 - California Energy Efficiency Coordinating Committee meetings
 - Reporting Peer Coordinating Group
 - Provide technical and consulting support based upon identified and ongoing needs, including:
 - CPUC reporting
 - Procurement
 - Marketing
 - Database development, management, reporting, and updates
 - Contractor and/or implementer management support including schedules, budget and spend tracking
 - Contractor and/or implementer reporting coordination

- Recurring meetings
- CPUC meeting support
- CPUC evaluation coordination
- CPUC data request
- CAEECC meetings
- Regulatory consulting
- Strategic funding consulting
- CPUC monthly reporting
- CPUC quarterly reporting
- CPUC annual true-up reporting
- CPUC annual report - narrative
- CPUC annual report - claims
- Program design consulting
- Annual implementation plan review and maintenance
- Other services requested within the existing scope include but are not necessarily limited to the following:
 - Accounting assistance and financial templates
 - Evaluation, measurement and verification (EM&V) support
 - Organizational strategic planning and events
 - Strategic Business Plan, Portfolio Plan, and technical inputs development for funding application to CPUC
 - Stakeholder engagement and advice letter requirements from recent CPUC decisions
 - Outreach to HVAC trades in I-REN territory

As part of the ongoing support, the Consultant shall assist with the development and implementation of identified sector programs listed below, and required metrics and reporting for the following:

- 1) **Public Sector and related Subprograms** – assist with implementing a Public Sector program and related subprograms for the purpose of achieving local and State Energy Efficiency goals. Consultant services in support of this category relate to implementation of the following program elements in accordance with the approved Program Implementation Plan (PIP):
 - a. Public Sector/Government Building Retrofit Program
 - b. Building Upgrade Concierge Program (BUC)
 - c. Establish incentives and leverage existing financing mechanisms
 - d. Marketing, education and outreach
 - e. Develop or enhance strategic energy plans
 - f. Develop Energy Efficiency and Distributed Energy resource programs
 - g. Develop incentive programs based on EE savings
 - h. Create and track Energy Savings and Cost-Effectiveness metrics
- 2) **Codes & Standards Sector and Subprograms** – assist with implementing a dynamic and targeted set of programs to assist local government agencies in better understanding and enforcing energy building codes.
 - a. Support local jurisdictions' building departments to better understand, manage, and enforce energy code compliance
 - b. Engage and support local builders and the building industry to comply with energy codes

- c. Provide regional tools, training, and resources to promote energy codes for long-term compliance
 - d. Develop training curriculum to address gaps in compliance with current requirements
 - e. Develop an online Code Hub community for sharing best practices
 - f. Identify and address areas of greatest need for improved code compliance with local governments
 - g. Develop strategies to improve consistency in code enforcement and compliance resources across the region
 - h. Evaluate and develop model ordinances and policies for use regionally
- 3) **Workforce, Education & Training (WE&T) Sector and Subprograms** – assist with implementing programs to ensure there is a trained workforce to support and realize energy efficiency savings goals across sectors following program elements in accordance with the approved PIP:
- a. Establish local partnerships with existing and potential training providers in the region to deliver targeted, equitable, and relevant energy efficiency training for contractors and other industry stakeholders
 - b. Facilitate industry engagement and development of job pathways to identify demand and jobs for a trained workforce
 - c. Identify and build partnerships with organizations and agencies related to education and training to achieve success with I-REN's WE&T initiatives
 - d. Ensure there is a trained workforce to support and realize energy efficiency savings goals across sectors
 - e. Develop and track quantifiable measures to show program effectiveness
 - f. Facilitate the development of multiple sites/delivery mechanisms for contractor and industry training programs
 - g. Convene and engage partners and organizations to define and establish a green workforce
 - h. Reinforce pathways from high school, trade schools, and colleges into jobs in the energy efficiency workforce
 - i. Assist with data collection, research, and metrics for developing strategies and for reporting effectiveness of programs

EXHIBIT “B”

SCHEDULE OF SERVICES

Project Schedule for Calendar Years 2025-2027

Task		2025				2026				2027			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Task 1 – I-REN Implementation Plan Development													
1.1	Implementation Plan Development												
Task 2 – I-REN Program Launch													
2.1	Mid Cycle and True Up Advice Letters												
	Mid-cycle advice letter (Fall 2025)												
	True-up advice letter (Fall 2027)												
2.2	Metrics Filings												
2.3	Utility Joint Cooperation Memo												
2.4	Ongoing Support												

Note: schedule subject to change based on updates to regulatory requirements.

EXHIBIT “C”

COMPENSATION BILLING RATES

Frontier Energy Billing Rates (\$)

Category	2025	2026	2027
President	343	364	398
Vice President	338	358	391
Sr. Director	338	358	391
Director / Principal Consultant	316	335	366
Sr. Manager / Engineering Manager	281	298	326
Manager	249	264	289
Sr. Engineer / Sr. Program Mgr	227	241	263
Engineer / Program Mgr	189	200	218
Sr. Program Consultant / Sr. Analyst	172	182	199
Program Consultant / Analyst	149	158	172
Sr. Program Coordinator / Sr. Technician	126	134	146
Program Coordinator / Technician	109	116	127
Program Associate / Direct Install Technician	91	96	105
Administrative	80	80	80

1. All rates in US Dollars and Subject to Change at the Discretion of Frontier Energy, Inc.
2. Materials, supplies, and travel billed at actual cost.
3. Mileage billable at the allowable IRS rate.

BluePoint Planning Billing Rates (\$)

Category	2025	2026	2027
Principal	220	230	245
Senior Consultant	195	205	215
Senior Associate	170	180	185
Associate	150	160	165
Project Assistant	130	135	145

1. Rates increase 5% per year and round to the nearest \$5.



Inland Regional Energy Network I-REN Executive Committee

Staff Report

Subject: First Amendment to Professional Services Agreement with The Energy Coalition for Public Sector Services

Contact: Benjamin Druyon, WRCOG Program Manager, bdruyon@wrcog.us, (951) 405-6727

Date: April 15, 2025

Recommended Action(s):

1. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a First Amendment to the Professional Services Agreement between WRCOG and The Energy Coalition for staff augmentation services to support ongoing implementation of I-REN's Public Sector programs in an amount not-to-exceed \$17,762,942.00, for a term through December 31, 2027.

Summary:

WRCOG's Professional Services Agreement (PSA) with The Energy Coalition (TEC) ends December 31, 2025, but I-REN has relied on their services more than expected. To support ongoing Public Sector growth, I-REN requires uninterrupted TEC support through the current Business Plan cycle, ending December 31, 2027.

Discussion:

Background

In January 2023, WRCOG entered into a PSA with TEC for the development and implementation of Public Sector programs for an amount not-to-exceed \$7,500,000.00 through December 2025. TEC has been instrumental in developing I-REN's two Public Sector programs: the Technical Assistance Program and the Normalized Metered Energy Consumption (NMEC) incentive program, publicly known as Cash For Kilowatts.

As I-REN has evolved and grown and continues to engage with more agencies in Riverside and San Bernardino Counties, the need for TEC's ongoing services has also evolved and grown. The first two years of I-REN's implementation focused on the development of programs and consisted of many orientations, workshops, and cooperation with other RENs and state agencies to increase awareness of I-REN and its offerings. I-REN began attending multiple events throughout the region to boost interest in program offerings, and began performing multiple energy efficiency audits. Staff quickly became aware of staffing capacity challenges. To resolve these challenges, I-REN reached out to TEC to provide more help within their existing Scope of Work (SOW), by providing augmented staffing services. TEC's

augmented staff support person acts as a representative on behalf of an I-REN partner within the I-REN region, leading stakeholder engagement and building positive working relationships with peers and I-REN partner agencies. These augmented staffing services would assign additional TEC staff to I-REN's partner agencies to engage and facilitate ongoing efforts in I-REN's Public Sector programs.

Present Situation

I-REN is now into its third year of implementation and program activity continues to increase. I-REN's Public Sector programs have been a great success and the Cash For Kilowatts incentive program is now starting to secure projects and pay incentives. TEC's augmented staffing services have been a much needed resource as staffing challenges are still present. Along with TEC's existing SOW for an additional two years, staff proposes the following expanded SOW for this amendment:

- Lead engagement activities with Inland Empire I-REN partner member agencies to build rapport and strong relationships to drive program participation.
- Establish and maintain positive working relationships with program participants, partners, program stakeholders, and utility representatives.
- Assist in educating participating public agencies about I-REN and work with agency representatives on a project-by-project basis to customize services to the participants' needs.
- Attend all I-REN Public Sector meetings (if I-REN partner staff are unable to attend).
- Create / generate language for emails.
- Set-up meetings with I-REN partner agencies as necessary.
- Assist with data gathering for I-REN partner agencies' Energy Resilience Roadmaps and benchmarking efforts.
- Stay up-to-date and maintain communication throughout all stages of I-REN partner agencies' project lifecycles, including energy audits, funding and financing, construction phase, and project completion stage.
- Provide data for I-REN partners and program reporting, including support with staff reports for committee / board meetings.
- Participate in recurring meetings with I-REN partner staff and track and report out on I-REN partner agency progress.
- Problem-solve and think creatively to help agencies overcome barriers to funding, financing, and implementing all viable energy efficiency strategies.

TEC's current contract is for an amount not-to-exceed \$7,500,000.00 through December 31, 2025. As I-REN prepares to submit a new Business Plan for the 2028-2035 funding cycle, staff would like to continue momentum with its successes without interruption by extending the existing TEC contract through the end of the 2022-2027 funding cycle. The amendment will increase the not-to-exceed amount to \$17,762,942 for an additional two years of services through December 31, 2027, and include the expanded SOW listed above. If I-REN's 2028-2035 Business Plan is approved, I-REN will reevaluate its contracts at that time.

Staff's recommendation is to request that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute an amendment with The Energy Coalition for Public Sector services through 2027.

Prior Action(s):

None.

Financial Summary:

Activities related to the amendment to the PSA with The Energy Coalition for Public Sector services will be added to the Fiscal Year 2025/2026 and subsequent budgets once approved by the WRCOG Executive Committee.

Attachment(s):

[Attachment 1 - First Amendment to the PSA with TEC](#)

**FIRST AMENDMENT TO
PROFESSIONAL SERVICES AGREEMENT
BETWEEN
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
AND
THE ENERGY COALITION**

1. PARTIES AND DATE.

This First Amendment is made and entered into this 5th day of May 2025, by and between the Western Riverside Council of Governments, a California public agency (“WRCOG”) and The Energy Coalition, a California 501(c)3 non-profit and professional services firm delivering energy efficiency, market transformation, and financial solutions through technical consulting, program development and implementation, and technology development (“Consultant”). WRCOG and Consultant are sometimes individually referred to as “Party” and collectively as “Parties.”

2. RECITALS.

2.1 Master Agreement.

WRCOG and Consultant have entered into that certain Professional Services Agreement 2023-80-2080-001 dated January 17, 2023 (“Master Agreement”).

2.2 First Amendment.

WRCOG and Consultant desire to enter into this First Amendment for the purposes of extending the term of the Master Agreement, updating exhibits, and providing additional compensation for ongoing energy efficiency support as it pertains to WRCOG’s Regional Energy Network development (“Services”).

3. AMENDMENTS.

3.1 Extension of Agreement Term.

Through this Amendment, the Parties hereby exercise their first option to renew the Master Agreement for two (2) additional years. The term of the Master Agreement is hereby extended to December 31, 2027, with no more than one (1) remaining option to renew or amend unless earlier terminated as provided in the Master Agreement.

3.2 Additional Compensation.

Per Section 3.3.1 of the Master Agreement, the original compensation amount pursuant to the Agreement shall not exceed Seven Million Five Hundred Thousand Dollars (\$7,500,000). This amendment increases the total compensation amount for the Services performed pursuant to the Agreement and this First Amendment to a total not to exceed amount of Seventeen Million Seven Hundred Sixty-Two Thousand Nine Hundred Forty Two Dollars (\$17,762,942) without written approval of WRCOG’s Executive Director. Work shall be performed in manner that is consistent with the Scope of Services, Schedule of Services and Compensation set forth in

Exhibits “A”, “B” and “C”, respectively, to the Master Agreement. The Services shall be more particularly described in the individual Task Order issued by WRCOG or its designee. No Services shall be performed unless authorized by a fully executed Task Order.

3.3 Addition of Exhibit E.

Exhibit “E” (“Contract Extension Memo”) is hereby added to the Master Agreement and incorporated into this First Amendment by this reference.

3.4 Continuation of Existing Provisions.

Except as amended by this First Amendment, all provisions of the Master Agreement, including without limitation the indemnity and insurance provisions, shall remain in full force and effect and shall govern the actions of the Parties under this First Amendment.

3.5 Counterparts.

This First Amendment may be executed in duplicate originals, each of which is deemed to be an original, but when taken together shall constitute one instrument.

3.6 Electronic Delivery of Agreement; Electronic Signatures.

A manually signed copy of this First Amendment which is transmitted by facsimile, email or other means of electronic transmission shall be deemed to have the same legal effect as delivery of an original executed copy of this First Amendment for all purposes. This First Amendment may be signed using an electronic signature.

[Signatures on the following page]

**SIGNATURE PAGE TO
FIRST AMENDMENT TO
PROFESSIONAL SERVICES AGREEMENT
BETWEEN
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
AND
THE ENERGY COALITION**

IN WITNESS WHEREOF, the Parties hereto have made and executed this First Amendment as of the date first written above.

WRCOG

WESTERN RIVERSIDE COUNCIL
OF GOVERNMENTS

By: _____
Dr. Kurt Wilson
Executive Director

CONSULTANT

THE ENERGY COALITION



By: _____
Craig Perkins
President / Executive Director

APPROVED AS TO FORM:

By: _____
Steven C. DeBaun
General Counsel
Best Best & Krieger, LLP

Exhibit "E"

CONTRACT EXTENSION MEMO



Inland Regional Energy Network I-REN Executive Committee

Staff Report

Subject: First Amendment to Professional Services Agreements for On-Call Workforce, Education & Training services with The Energy Coalition and Riverside Community College Districts

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

Date: April 15, 2025

Recommended Action(s):

1. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a First Amendment to the On-Call Professional Services Agreement between WRCOG and The Energy Coalition for staff augmentation services to support implementation of workforce assessments recommendations in an amount not-to-exceed \$735,000, for a term through December 31, 2027.
2. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a First Amendment to the 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 \$600,000, for a term through December 31, 2027.

Summary:

In January 2025, I-REN completed its Energy Workforce Gaps Assessment, identifying four key recommendations prioritized by the I-REN Executive Committee. To effectively implement these, staff recommends amending the Professional Services Agreements with The Energy Coalition and the Riverside Community College District.

Discussion:

Background

On September 18, 2023, I-REN's Workforce, Education & Training (WE&T) Sector launched its first program, the I-REN Energy Fellowship. During the development of the Fellowship Program, staff continued to assess other WE&T Sector program initiatives (i.e., energy certification, and workforce training programs) for future program development opportunities. As part of this informal assessment, staff have met with numerous local organizations, and developed relationships with various educational institutions, workforce & economic development organizations, training providers, and community-based organizations specialized in supporting job paths in energy fields.

Two key insights identified were:

- 1) The need to develop an Energy Workforce Gaps Assessment to guide future workforce resource deployment, and;
- 2) Convening of an Energy Workforce Roundtable to support in the identification of energy workforce resources currently available as well as the gaps that enhancement of existing programs or development of new programs could fill to foster stronger energy workforce education and training.

On February 5, 2024, The WRCOG Executive Committee entered into Professional Services Agreement with The Energy Coalition for the development of an Energy Workforce Gaps Assessment, and the Riverside Community College District (the administrator of the Inland Empire Desert Regional Consortium) for the development, implementation, and facilitation of quarterly I-REN Workforce Roundtable meetings.

Present Situation

In January 2025, the I-REN Energy Workforce Gaps Assessment (Assessment) was finalized. Insight from I-REN Workforce Roundtables played a key part in the thorough development of the Assessment. With the completion of the Assessment and successful development of the Roundtables, I-REN continues to expand its partnerships to ensure the equitable deployment of resources toward the initiatives that support the key recommendations identified in the Assessment. This will require additional support. As such, I-REN proposes the following expanded Scopes of Work for The Energy Coalition to support in staff augmentation services and the Riverside Community College District for regional energy sector workforce navigation:

- The Energy Coalition will provide enhanced services that include the implementation of strategies and tactics that meet the need of the key recommendations identified in the Assessment, and prioritized by the I-REN Executive Committee.
 - **Connect job seekers to training providers.** Feedback from energy employers and assessments of local training institutions indicate that job seekers—particularly in underserved and rural areas—face significant barriers in acquiring the necessary skills, training, and certifications to secure stable employment in the energy industry.
 - **Provide support services to make training and certification more attainable.** The Assessment revealed that job applicants often need more skills / certifications to meet the region's energy workforce needs but that they face significant barriers to obtaining the required certifications. Training institutions in the region currently have only a small number of accessible resources for the energy workforce. Workers in more populous areas have greater access to training centers than those in high- and low-desert communities, who often need help to obtain training due to the distance between their employment areas and larger workforce hubs.
 - **Strengthen the regional education and training pipeline from K-12 to energy employment.** To address energy employers' needs and workers' skills gaps, I-REN should collaborate with K-12 educational institutions to create a seamless education-to-career pipeline, offering localized training programs that focus on the skills needed for in-demand energy roles.
 - **Strengthen collaboration between employers and workforce development organizations to assess training effectiveness.** Currently, there are few opportunities for employers, workforce development organizations, and educational institutions to collaborate

directly on strategies for building an energy-focused workforce. To build a strong energy workforce infrastructure, I-REN should foster stronger partnerships between local educational institutions, employers, and workforce development organizations to ensure that training programs align with regional industry needs.

- Riverside Community College District, as the administrator of the Inland Empire Desert Regional Consortium (IEDRC), a coalition of the 12 community colleges in Riverside and San Bernardino Counties, will provide enhanced energy sector navigation services that will respond to identified regional energy workforce needs, expand collaboration, and maximize impact to industry and workforce stakeholders.
 - IEDRC will serve as the connectivity hub amongst the otherwise often disparate entities within the regional energy workforce space and leverage IEDRC's existing portfolio of policy, education and training resources and teams. Drawn from regional, statewide, and national energy industry experience, these navigation services will provide essential sector expertise that will connect to and empower other key regional stakeholders which offer more generalized client services and career guidance.
 - Develop a "Beyond the Walls" framework that will integrate workforce education, training, marketing, and outreach into a cohesive engagement strategy, effectively communicating employer hiring needs and their broader impact on jobs, education, and the economy. By leveraging industry facilities as "Living Laboratories" connected to community colleges, this approach strengthens career pathways and enhances awareness of the regional workforce development ecosystem.

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-REN's 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, staff will take this item to WRCOG's Executive Committee, the lead administrative agency, on May 5, 2025, with a request to authorize WRCOG's Executive Director to execute the contract(s).

Prior Action(s):

February 5, 2024: The WRCOG Executive Committee authorized the WRCOG Executive Director to execute new On-Call Professional Services Agreements between WRCOG and 1) 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) the 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; and 3) the 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.

January 16, 2024: The I-REN Executive Committee recommended that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute new On-Call Professional Services Agreements between WRCOG and 1) 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) the 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; and 3) the 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.

Financial Summary:

Activities related to the PSA amendments with The Energy Coalition for Public Sector Services will be added to the Fiscal Year 2025/2026 and subsequent budgets once approved by the WRCOG Executive Committee.

Attachment(s):

[Attachment 1 - First Amendment to The Energy Coalition PSA](#)

[Attachment 2 - First Amendment to Riverside Community College PSA](#)

Attachment

First Amendment to Professional
Services Agreement for On-Call
Services between Western Riverside
Council of Governments and The
Energy Coalition Contract Number
2024-67-2080-003

**FIRST AMENDMENT TO
PROFESSIONAL SERVICES AGREEMENT
FOR ON-CALL SERVICES
BETWEEN
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
AND
THE ENERGY COALITION
CONTRACT NUMBER 2024-67-2080-003**

1. PARTIES AND DATE.

This First Amendment is made and entered into this 5th day of May 2025, by and between the Western Riverside Council of Governments, a California public agency ("WRCOG") and **The Energy Coalition (TEC), 501(c)3 nonprofit** ("Consultant"). WRCOG and Consultant are sometimes individually referred to as "Party" and collectively as "Parties."

2. RECITALS.

2.1 Master Agreement.

WRCOG and Consultant have entered into that certain Professional Services Agreement dated February 14, 2024 ("Master Agreement").

2.2 First Amendment.

WRCOG and Consultant desire to enter into this First Amendment for the purpose of extending the Master Agreement length and providing additional compensation for ongoing development and deployment of Workforce Education and Training program initiatives as it pertains to WRCOG's Inland Regional Energy Network ("Services").

3. TERMS.

3.1 Extending Master Agreement Length.

Per Master Agreement Section 3.1.2, the term of the Master Agreement is from February 5, 2024, to June 30, 2026. Additionally, WRCOG shall have the unilateral option, at its sole discretion, to renew the Agreement for no more than one (1) additional one-year term. The Parties may, by mutual, written consent, extend the term of the Agreement if necessary to complete the Services. This amendment extends the Master Agreement term to December 31, 2027, to continue the scope of work as described in Exhibit "A" of this First Amendment.

3.2 Additional Compensation.

Per Section 3.3.1 of the Master Agreement, the original compensation amount for all Task Orders issued pursuant to the Agreement, shall not exceed One Hundred Seventy-Five Thousand Dollars (\$175,000). This amendment increases the total compensation amount for Services performed and Task Orders issued pursuant to the Agreement and this First Amendment to a total not to exceed amount of **Seven-Hundred Thirty-Five Thousand Dollars (\$735,000)** without written approval of WRCOG's Executive Director. Work shall be performed in a manner that is

consistent with the Master Agreement's Scope of Services and the Schedule of Services and Compensation as set forth in Exhibit "A" and "B" of this First Amendment. The Scope of Services shall be more particularly described in the individual Task Order issued by WRCOG or its designee. No Services shall be performed unless authorized by a fully executed Task Order.

3.3 Continuation of Existing Provisions.

Except as amended by this First Amendment, all provisions of the Master Agreement including without limitation the indemnity and insurance provisions, shall remain in full force and effect and shall govern the actions of the Parties under this First Amendment.

3.4 Counterparts.

This First Amendment may be executed in duplicate originals, each of which is deemed to be an original, but when taken together shall constitute one instrument.

3.5 Electronic Delivery of Agreement; Electronic Signatures.

A manually signed copy of this First Amendment which is transmitted by facsimile, email or other means of electronic transmission shall be deemed to have the same legal effect as delivery of an original executed copy of this First Amendment for all purposes. This First Amendment may be signed using an electronic signature.

[Signatures on the following page]

**SIGNATURE PAGE TO
FIRST AMENDMENT TO
PROFESSIONAL SERVICES AGREEMENT
FOR ON-CALL SERVICES
BETWEEN
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
AND
THE ENERGY COALITION
CONTRACT NUMBER 2024-67-2080-003**

IN WITNESS WHEREOF, the Parties hereto have made and executed this First Amendment as of the date first written above.

WRCOG

CONSULTANT

WESTERN RIVERSIDE COUNCIL
OF GOVERNMENTS

The Energy Coalition

By: _____
Dr. Kurt Wilson
Executive Director

By: _____
Craig Perkins
President & Executive Director

Approved to Form:

By: _____
Steven C. DeBaun
General Counsel

Exhibit “A”

SCOPE OF WORK

In February 2024, I-REN tasked The Energy Coalition (TEC) with creating the market assessment to examine the workforce gaps within the energy sector in Riverside and San Bernardino counties, identify training needs, and address job accessibility issues to strengthen the local workforce and meet growing energy sector demands. Between March and November 2024, TEC conducted a training market analysis and gathered primary and secondary data on energy employers and training opportunities in the region. TEC engaged with local stakeholders in-person and conducted an employer needs survey to understand employers' needs and challenges. This data informed an analysis of employment opportunities, training accessibility, and workforce gaps in the Inland Empire. The findings highlighted challenges faced by energy employers, job seekers, and stakeholders in building a skilled workforce, leading to recommendations for future workforce development programs.

In December 2024, TEC finalized the Energy Workforce Gaps Assessment, which provides an overview of the current energy labor market, the results from the employer needs assessment survey, and an analysis of available training in the region. Based on the assessment findings, TEC provided four recommendations for the I-REN Executive Committee to review to inform future WE&T programming within the I-REN Territory.

This proposal offers staff support services from February 2025 - December 2027 to help support I-REN with additional staff capacity that will allow I-REN to take action on the recommendations as listed in the Scope of Services below and provide ad hoc support services to I-REN, as needed.

Scope of Services

The support services will include the implementation of the following recommendations as listed in I-REN's energy workforce and training market assessment:

1. **Connect job seekers to training providers.** Feedback from energy employers and assessments of local training institutions indicate that job seekers—particularly in underserved and rural areas—face significant barriers in acquiring the necessary skills, training, and certifications to secure stable employment in the energy industry. To address these challenges, I-REN should:
 - Build partnerships with leading training providers and local labor unions, connecting employers with apprenticeship programs and ensuring access to certifications and training opportunities for job seekers, especially in underserved areas.
 - Integrate third-party training providers, offering flexible learning formats (e.g., online courses, evening classes) to cater to different schedules and connect job seekers to regionally-relevant workforce education and training (WE&T) programs.
 - Organize job fairs and informational sessions to raise awareness about training opportunities and encourage employees to engage with trade associations and workforce development networks for professional growth and industry insights.
 - Develop a clear, data-driven framework to measure the effectiveness of training programs and partnerships, including metrics like job placement and retention rates.
2. **Provide support services to make training and certification more attainable.** The assessment revealed that job applicants often need more skills/certifications to meet the

region's energy workforce needs but that they face significant barriers to obtaining the required certifications. Training institutions in the region currently have only a small number of accessible resources for the energy workforce. Workers in more populous areas have greater access to training centers than those in high and low-desert communities, who often need help to obtain training due to the distance between their employment areas and larger workforce hubs. To address this, I-REN should:

- Collaborate with employers to offer financial support for employees, including subsidizing certification costs, providing training stipends, covering transportation, and paying for materials and exam fees.
- Work with employers to provide paid time for employees to engage in training and complete certifications, helping employees balance work and training obligations.
- Collaborate with employers to provide affordable or free training, particularly for certifications essential to employees' roles, and partner with community organizations to offer training for underserved populations.
- Support employers in offering or connecting employees to financial support for education programs, certifications, and skill development programming.
- Develop specific initiatives to enhance access to training and employment in underserved communities.

3. **Strengthen the regional education and training pipeline from K-12 to energy employment.** To address energy employers' needs and workers' skills gaps, I-REN should collaborate with K-12 educational institutions to create a seamless education-to-career pipeline, offering localized training programs that focus on the skills needed for in-demand energy roles. To address this, I-REN should:

- Collaborate with educational institutions to enhance or develop new energy-related CTE pathways in local high schools, certification programs, and hands-on experiences, building a stronger pipeline from education into energy sector jobs.
- Introduce certification programs in high school education
- Create mentorship opportunities where experienced employees guide new hires, helping them gain practical skills and boost job retention.
- Incorporate entrepreneurial skills and business development into K-12 training to provide necessary skills for students interested in self-employment, particularly in underserved or rural regions where traditional energy jobs may be limited.
- Develop internship opportunities and career fairs to connect high school students with energy industry jobs and expand their access to relevant experience, training, and career pathways within the energy sector.

4. **Strengthen collaboration between employers and workforce development organizations to assess training effectiveness.** Currently, there are few opportunities for employers, workforce development organizations, and educational institutions to collaborate directly on strategies for building an energy-focused workforce. To build a strong energy workforce infrastructure, I-REN should foster stronger partnerships between local educational institutions, employers, and workforce development organizations to ensure that training programs align with regional industry needs. To address this, I-REN should:

- Organize regular hybrid meetings with employers, workforce development organizations, and educational institutions to discuss energy industry standards, evolving workforce needs, and strategies for effective training programs.
- Actively engage energy employers, workforce organizations, and educational institutions to align on the development and continuous improvement of training programs, ensuring they remain relevant and meet both employer and job seeker needs.

- Develop and monitor clear, measurable metrics (e.g., program completion rates, post-training employment outcomes, and participant satisfaction) to evaluate and improve the effectiveness of energy-related training programs.
- Encourage employers to conduct regular skills assessments to identify areas for additional training or certification, ensuring that employees acquire up-to-date skills for better productivity and retention.

DRAFT

EXHIBIT “B”

SCHEDULE OF SERVICES AND COMPENSATION

Project Assumptions

TEC will designate a primary point of contact to provide the majority of support service hours to I-REN, facilitate effective communication, and ensure accountability while additional staff members will be available for specific tasks as needed.

All services and rates are aligned with TEC’s current contract number 2024-67-2080-003 with I-REN.

The project term will be February 2025 - December 2027 with the assumption of about 10-15 staff hours per week in February and March 2025 and then ramping up to about 20-25 hours per week for the duration of the task through 2027.

Proposed Cost Overview and Rates

Work will be performed through a time and materials contract, invoiced monthly to I-REN.

Task	Estimated Costs
2025 on-call services*	\$ 165,299
2026 on-call services*	\$ 194,336
2027 on-call services*	\$ 200,163
	\$ 559,798

* [Services include the deployment and implementation of recommendation identifies in I-REN’s Energy Workforce and Gaps Assessment:](#) Connect job seekers to training providers, provide support services to make training and certification more attainable, strengthen the regional education and training pipeline from K-12 to energy employment, strengthen collaboration between employers and workforce development organizations to assess training effectiveness, and provide other ad hoc support services as needed.

The proposed staff names, classifications, and current rates from TEC’s current contract number 2024-67-2080-003 with I-REN are listed below. Additional staff may support as needed and rates are subject to change to align with any contract changes.

Staff Name	Classification	Current 2024 Rate (\$/hr)
Laurel Rothschild	Vice President	\$280
Meaghan Laverty	Director	\$230
Taylor Rosetti	Program Manager	\$190
Tinuviel Carlson	Program Manager	\$190
Jasmine Pineda	Project Manager	\$155
Bryan Miranda Quintana	Project Coordinator	\$95
TBD	Project Accountant	\$120

Attachment

First Amendment to Professional
Services Agreement for On-Call
Services between Western Riverside
Council of Governments and
Riverside Community College District
(RCCD) Contract Number 2024-67-
2080-001

**FIRST AMENDMENT TO
PROFESSIONAL SERVICES AGREEMENT
FOR ON-CALL SERVICES
BETWEEN
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
AND
RIVERSIDE COMMUNITY COLLEGE DISTRICT (RCCD)
CONTRACT NUMBER 2024-67-2080-001**

1. PARTIES AND DATE.

This First Amendment is made and entered into this 5th day of May 2025, by and between the Western Riverside Council of Governments, a California public agency (“WRCOG”) and **Riverside Community College District (RCCD) on behalf of Inland Empire/Desert Regional Consortium (IEDRC), an Educational Partnership** (“Consultant”). WRCOG and Consultant are sometimes individually referred to as “Party” and collectively as “Parties.”

2. RECITALS.

2.1 Master Agreement.

WRCOG and Consultant have entered into that certain Professional Services Agreement dated February 14, 2024 (“Master Agreement”).

2.2 First Amendment.

WRCOG and Consultant desire to enter into this First Amendment for the purpose of extending the Master Agreement length and providing additional compensation for ongoing development and deployment of Workforce Education and Training program initiatives as it pertains to WRCOG’s Inland Regional Energy Network (“Services”).

3. TERMS.

3.1 Extending Master Agreement Length.

Per Master Agreement Section 3.1.2, the term of the Master Agreement is from February 5, 2024, to June 30, 2026. Additionally, WRCOG shall have the unilateral option, at its sole discretion, to renew the Agreement for no more than one (1) additional one-year term. The Parties may, by mutual, written consent, extend the term of the Agreement if necessary to complete the Services. This amendment extends the Master Agreement term to December 31, 2027, to continue the scope of work as described in Exhibit “A” of this First Amendment.

3.2 Additional Compensation.

Per Section 3.3.1 of the Master Agreement, the original compensation amount for all Task Orders issued pursuant to the Agreement, shall not exceed One Hundred Thousand Dollars (\$100,000). This amendment increases the total compensation amount for Services performed and Task Orders issued pursuant to the Agreement to a total not to exceed amount of **Six-Hundred Thousand Dollars (\$600,000)** without written approval of WRCOG’s Executive Director. Work shall be performed in a manner that is consistent with the Master Agreement’s

Scope of Services and the Schedule of Services and Compensation as set forth in Exhibit “A” and “B” of this First Amendment. The Scope of Services shall be more particularly described in the individual Task Order issued by WRCOG or its designee. No Services shall be performed unless authorized by a fully executed Task Order.

3.3 Continuation of Existing Provisions.

Except as amended by this First Amendment, all provisions of the Master Agreement including without limitation the indemnity and insurance provisions, shall remain in full force and effect and shall govern the actions of the Parties under this First Amendment.

3.4 Counterparts.

This First Amendment may be executed in duplicate originals, each of which is deemed to be an original, but when taken together shall constitute one instrument.

3.5 Electronic Delivery of Agreement; Electronic Signatures.

A manually signed copy of this First Amendment which is transmitted by facsimile, email or other means of electronic transmission shall be deemed to have the same legal effect as delivery of an original executed copy of this First Amendment for all purposes. This First Amendment may be signed using an electronic signature.

[Signatures on the following page]

**SIGNATURE PAGE TO
FIRST AMENDMENT TO
PROFESSIONAL SERVICES AGREEMENT
FOR ON-CALL SERVICES
BETWEEN
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
AND
RIVERSIDE COMMUNITY COLLEGE DISTRICT (RCCD)
CONTRACT NUMBER 2024-67-2080-001**

IN WITNESS WHEREOF, the Parties hereto have made and executed this First Amendment as of the date first written above.

WRCOG

CONSULTANT

WESTERN RIVERSIDE COUNCIL
OF GOVERNMENTS

Riverside Community College District

By: _____
Dr. Kurt Wilson
Executive Director

By: _____
Aaron S. Brown
VC, Business & Financial Svcs

Approved to Form:

By: _____
Steven C. DeBaun
General Counsel

Exhibit “A”

SCOPE OF WORK

Regional Energy Workforce Sector Navigation

This proposal is submitted to the Inland Regional Energy Network (I-REN) with the purpose of responding to identified regional energy workforce needs, expand collaboration, and maximize impact to industry and workforce stakeholders.

IEDRC will serve as the connectivity hub amongst the otherwise often disparate entities within the regional energy workforce space and leverage IEDRC's existing portfolio of policy, education and training resources and teams. Similarly, navigation services will provide essential sector expertise drawn from the region, statewide and national energy industry experience. This experience will empower other key regional stakeholders (which offer more generalized client services and career guidance) through workshops and collateral materials.

Recommendation #1: To address barriers faced by job seekers, especially in underserved areas, I-REN should strengthen partnerships with local and third-party training providers, ensuring access to clear, affordable, and comprehensive training and certification programs. Engaging with regional trade associations and specialized organizations will further expand opportunities for networking, professional development, and exposure to industry standards and technologies.

Recommendation #2: I-REN should collaborate with training providers and employers to offer support services, such as subsidized certification costs, financial assistance, paid time off for training, and transportation stipends, to reduce barriers for job seekers in underserved areas, ensuring greater access to energy sector training and certification opportunities.

Recommendation #3: I-REN should strengthen the regional education and training pipeline by collaborating with educational institutions to offer virtual and hands-on training options, enhance existing CTE Pathways or induce new opportunities, introduce certification programs in K-12, provide mentorship and on-the-job training, and incorporate entrepreneurial skills into pathways to support self-employment, enhancing career opportunities and local economic growth in the energy sector.

Recommendation #4: Strengthen collaboration between employers, workforce development organizations, and educational institutions to align training programs with industry needs, regularly assess training effectiveness through metrics like completion rates and satisfaction, and use data-driven approaches to address skill gaps and improve workforce development.

I-REN Energy Workforce Roundtable: Maintenance & Expansion Program Management

The IEDRC Team will create subgroups of the existing Workforce Roundtable to address the four Assessment recommendations. These smaller “working groups” will consist of prior Roundtable participants and be expanded to reflect the sector nuances, interests and expertise. They will also allow for more nimble response to opportunities, consider actions, provide input, and offer best practices.

General Approach

The mission of the Inland Empire/Desert Regional Consortium is to enhance individually and collectively the workforce missions of its stakeholders through communication, coordination,

collaboration, and provision of resources. The vision of the Inland Empire/Desert Regional Consortium is to be a trusted partner of regional workforce entities and to contribute to the social and economic prosperity of the region and its diverse communities. The IEDRC's projects and services support the work of not only community college and K-12 workforce stakeholders but also adult education providers, local workforce development boards, regional non-profit workforce entities, and others.

The IEDRC has a firmly established regional structure that responds to industry workforce needs and supports students and incumbent workers who wish to expand their skills. The entire project will be led by Lori Sanchez, IEDRC Interim Regional Chair, and managed for maximum efficiency and impact. Lori will lead the core team, consisting of consultants James Morante (subject matter expert in Energy and Energy Efficiency), Dr. Audrey Childers (project manager), and employer engagement managers as needed. Each team member is experienced in their area of specialization, and all team members are known and respected in the region. The IEDRC will tap into its extensive network and invite expansion and innovation to fully address the needs of the project. RCCD will house the program, provide administrative support and fiscal oversight, and ensure that the project is implemented on time, within budget, and in compliance with program requirements.

Qualifications

RCCD has served as the lead and fiscal agent for the IEDRC since 1994. During that time, IEDRC has established a solid reputation as being a trusted partner and the "go to" entity for convening and collaboration among community colleges, K12, regional occupational centers, adult education, workforce boards, and other workforce partners across Riverside and San Bernardino counties.

"Beyond the Walls" Workforce Framework: Bringing the Energy Sector to Life

The Beyond the Walls framework incorporates workforce education and training, marketing, outreach and awareness within a unified and seamless customized engagement strategy. The collaborative partnership offers effective communication of the impact of an employer's workforce hiring needs to a much broader audience and how actions and investments impact regional jobs, education, the economy and overall community vitality. This focused strategy leverages industry facilities as regional "Living Laboratories" linking to community colleges as the catalyst for obtaining the necessary skills in order "put a face" on the career pathway. This approach also reinforces the importance of- and familiarity with- all aspects within the regional workforce development ecosystem.

The IEDRC Team will uniquely integrate this strategy within the Roundtable "work groups" Each strategy may include a combination of the following, dependent upon region, participating employers, community college program availability and industry sector:

- Introduce micro-regions to the world of in-demand energy career pathways – in THEIR communities – via tours, visits, guest speakers, etc.
- Collaborate with local CBOs to expose learners to latest technology, industry trends & opportunities in a real-world environment.
- Partner with regional Chambers of Commerce, Workforce Investment Boards and economic development organizations on Open House events with applicable community college and employer locations and training centers.
- Utilize forums for subsequent trainer-the-trainer, employee upskilling and other professional development opportunities.

Exhibit “B”

Service and Compensation

Fee Structure

The fee for this scope of work is \$500,000 for the period July 1, 2025 through December 31, 2027. Fees are inclusive of travel and lodging necessary for IEDRC staff and contractors to perform necessary tasks. RCCD will serve as Fiscal Agent. The attached budget provides a breakdown of costs and additional details.

Budget \$500,000

Direct Costs \$480,769

Indirect Costs (4%) \$19,231

Total Grant Funds \$500,000

Expenditure Type	FY 2025-26 7/1/2025 - 6/30/2026	FY 2026-27 7/1/2026 - 6/30/2027	FY 2027-28 7/1/2027 - 12/31/2027	TOTAL
RCCD IEDRC Support of I-REN Priorities	29,000	29,000	14,769	72,769
Engage! Strategies CEO James Morante	96,000	96,000	60,000	252,000
EducateX CEO Audrey Childers, Ed.D.	60,000	60,000	36,000	156,000
RCCD Indirect Costs 4%	7,400	7,400	4,431	19,231
Total Budget	192,400	192,400	115,200	500,000

Budget Narrative

IEDRC Support of I-REN Priorities

Support four I-REN Workforce, Education and Training Priorities:

1. Connect job seekers to training providers
2. Provide support services to make training and certification more attainable
3. Strengthen the regional education and training pipeline from K-12 to energy employment
Act as liaison between energy partners and IEDRC members Provide information on college programs
4. Strengthen collaboration between employers and workforce development organizations to assess training effectiveness

Engage!Strategies

Support four I-REN Workforce, Education and Training Priorities:

1. Connect job seekers to training providers
2. Provide support services to make training and certification more attainable

3. Strengthen the regional education and training pipeline from K-12 to energy employment
Serve as central navigator for connecting entities Coordinate Regional Energy Workforce Sector Hub Moderate stakeholder meetings
4. Strengthen collaboration between employers and workforce development organizations to assess training effectiveness

EducateX

Support four I-REN Workforce, Education and Training Priorities:

1. Connect job seekers to training providers
2. Provide support services to make training and certification more attainable
3. Strengthen the regional education and training pipeline from K-12 to energy employment
Project management activities such as project timelines, meeting dates, recordkeeping.
Track achievement of project deliverables Advise on project resources
4. Strengthen collaboration between employers and workforce development organizations to assess training effectiveness

Indirect

4% indirect to RCCD for fiscal and contract management

DRAFT



Inland Regional Energy Network

I-REN Executive Committee

Staff Report

Subject: Memorandum of Understanding with California State University of San Bernardino for Evaluation, Measurement, and Verification Studies

Contact: Benjamin Druyon, WRCOG Program Manager, bdruyon@wrcog.us, (951) 405-6727

Date: April 15, 2025

Recommended Action(s):

1. Recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a Memorandum of Understanding between WRCOG and the California State University of San Bernardino for I-REN's Evaluation, Measurement, and Verification Studies in an amount not-to-exceed \$120,000, for a term through December 31, 2027.

Summary:

I-REN has the opportunity and budget to engage in Evaluation, Measurement, and Verification research by performing various studies authorized by the California Public Utilities Commission (CPUC) as part of I-REN's current Business Plan activities. These studies are intended to assess how I-REN is currently performing, guide I-REN in modifying its existing programs, and to shape future programs and activities.

Discussion:

Background

When the CPUC authorized funding for I-REN in 2021, a portion of the authorized budget was set aside for Evaluation, Measurement, and Verification (EM&V) research by performing various studies. The EM&V Studies will be used to improve I-REN's portfolio of programs and ensure that the programs are collecting data to support evaluation needs.

I-REN has been in operation for a couple of years and now has the opportunity to begin conducting Studies, with anticipated launch in May 2025.

Present Situation

I-REN staff have held workshops for each of its three sectors - Public, Codes & Standards, and Workforce Education & Training - to brainstorm potential Studies that will greatly benefit I-REN's processes and enhance its existing programs and have identified several potential Studies to choose from. I-REN staff have also held meetings with representatives from the California State University of San Bernardino (CSUSB) on the development of these Studies and the process for executing these

Studies to obtain maximum results.

EM&V Studies Overview

I-REN's Studies will include six research efforts, two for each of I-REN's sectors. These efforts are summarized below and described in more detail in the attached Memorandum of Understanding (MOU). For each of these Studies, I-REN intends to collaborate with a local university, CSUSB, to engage with local academic research.

Public Sector Studies:

Study 1. Barriers to Project Pipeline

This Study aims to identify barriers preventing agency progress through project pipeline. The objective of this Study is to determine obstacles that jurisdictions face during project exploration. Study 1 will consist of a gap assessment including a qualitative interview and a short survey.

Study 2. Jurisdictions Meeting Equity Criteria

This Study will assess which jurisdictions that have engaged with I-REN's Public Sector programs meet CPUC-defined equity criteria (D.23-06-055). The objective of this Study is to evaluate the number of equity jurisdictions participating in the public sector. Study 2 will consist of a market study to evaluate the number of jurisdictions that meet equity criteria.

Codes & Standards (C&S) Studies:

Study 3. Low Engagement Jurisdictions

This Study aims to identify characteristics of jurisdictions that have little to no participation in I-REN's program offerings. The objective of this Study is to increase the number and diversity of jurisdictions participating in I-REN's C&S services. Study 3 will consist of a desk review of jurisdictions with low engagement followed by a short survey to those jurisdictions.

Study 4. Training Formats

This Study will review current training formats and survey I-REN's jurisdictions for preferred training methods. The objective of this survey is to learn preferred training formats and offer a variety to I-REN participants. Study 4 will consist of a desk review of current formats alongside a survey to I-REN's jurisdictions.

Workforce Education & Training (WE&T) Studies:

Study 5. Fellow Retention

This Study aims to identify and assess factors that lead to Fellow retention following I-REN's Fellowship Program under WE&T. The objective of this survey is to evaluate the needs of site hosts that are required to hire Fellows past the Fellowship Program. Study 5 will consist of a survey to site hosts alongside a demographic data review of the Fellows.

Study 6. Performance Metrics

This Study aims to identify metrics that track the success of the WE&T Program. The objective of this Study is to develop metrics that can be used to measure the success and performance of WE&T programs. Study 6 will consist of data analysis of performance factors that can measure success.

I-REN's EM&V budget is \$626,464, as approved by the CPUC. The anticipated budget for these Studies is not to exceed \$120,000 (\$20,000 for each study).

The requested action is to recommend that the WRCOG Executive Committee authorize the WRCOG Executive Director to execute a MOU between WRCOG and the CSUSB for I-REN's EM&V Studies in an amount not-to-exceed \$120,000, for a term through December 31, 2027.

The attached agreement is in draft form as it is currently under review with CSUSB at the time of drafting this Staff Report. If the I-REN Executive Committee authorizes the MOU to proceed, the final version will be ready for execution at the WRCOG Executive Committee meeting in May.

Prior Action(s):

None.

Financial Summary:

The financial component related to Memorandum of Understanding with California State University of San Bernardino for Evaluation, Measurement, and Verification Studies will be added to the WRCOG Fiscal Year 2025/2026 and subsequent budgets once approved by the WRCOG Executive Committee.

Attachment(s):

[Attachment 1 - Draft MOU with CSUSB for EM&V Study](#)

**MEMORANDUM OF UNDERSTANDING BETWEEN
THE WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS AND
CALIFORNIA STATE UNIVERSITY OF SAN BERNARDINO**

This Memorandum of Understanding (“MOU”) is made and entered into this 5th day of May, 2025 (the “Effective Date”) by and between the Western Riverside Council of Governments, a California public agency, (“WRCOG”) on the individually and on behalf of the Inland Regional Energy Network (“I-REN”) and the **California State University of San Bernardino (CSUSB)**, a non-profit educational institution incorporated under the laws of California (“Organization”). WRCOG and Organization are sometimes referred to herein individually as “Party” and collectively as “Parties”.

1. RECITALS

1.1 WRCOG is administrator of and the contracting agent for the I-REN.

1.2 The I-REN seeks to implement energy efficiency programs and initiatives that will lead to long-term, sustainable benefits to participating public agencies throughout the SoCalGas and Southern California Edison service areas.

1.3 As authorized by the California Public Utilities Commission, WRCOG has the independent authority to design, manage and deliver I-REN programs and initiatives.

1.4 Organization and the WRCOG desire to work together for **I-REN's Evaluation Measurement and Verification (EM&V) studies** (“Project”).

1.5 It is the intent of the Parties to enter into this MOU to establish and coordinate the responsibilities of the Parties with respect to the Project, all as further set forth herein.

NOW THEREFORE, for good and valuable consideration, the receipt of which is hereby acknowledged, it is mutually understood and agreed by WRCOG and Organization as follows:

2. TERMS OF THE MOU

2.1 Incorporation of Recitals. The recitals set forth above are true and correct and are incorporated into this MOU as though fully set forth herein.

2.2 Term. This MOU shall commence on the Effective Date and continue through **December 31, 2027**, unless the MOU is previously terminated as provided for herein (“Term”)

2.3 General Agreement to Cooperate. The Parties agree to mutually cooperate in order to help ensure that the Project is successfully completed with minimum impact to both Parties and the public.

2.4 WRCOG Commitments. WRCOG hereby agrees to do the following:

(a) WRCOG Contact. Designate a leadership team member or equivalent person to act as liaison to the Organization Contact, providing a first point of communication for the Project (“WRCOG Contact”). The WRCOG Contact will be **Benjamin Druyon – bdruyon@wrcog.us**.

(b) Funding Commitments. WRCOG shall be responsible for **reimbursement of pre-approved time and materials spent on behalf** of the Project for up to six studies, not to exceed \$20,000.00 for each study completed, billed at rates described in Exhibit “B”, attached hereto to this MOU and incorporated herein by this reference.

(c) Disbursement of Funding Commitments. WRCOG agrees to disburse the portion of the funds attributable to a portion of the Services for which (1) an application for reimbursement has been submitted, and (2) Organization has submitted paid invoices or receipts for the Services as provided in this MOU. WRCOG shall reimburse Organization within thirty (30) days of receipt of the application for reimbursement.

(d) Monitoring and Evaluation. WRCOG will monitor and evaluate the Organization in the performance of this MOU. WRCOG may conduct progress reviews. These reviews will focus on the extent to which planned Services has been carried out, the effectiveness of the Organization’s management, and quality of the Services.

(e) **[***INSERT MORE PROVISIONS AS NEEDED***]**.

2.5 Organization Commitments. Organization hereby agrees to do the following:

(a) Organization Contact. Identify a primary staff member responsible for communication between the WRCOG and Organization for fulfillment of the Project (“Organization Contact”). The Organization Contact will be **Dr. Robert Stokes**.

(b) Services. Organization shall provide services for the Project (the “Services”) at its sole cost and expense. The Services are more particularly described in Exhibit “A”, attached hereto to this MOU and incorporated herein by this reference.

(c) Funding Commitments. Organization shall be responsible for **non-related and non-approved expenses incurred on behalf** of the Project.

(d) Schedule of Performance. Organization shall diligently and in good faith pursue and perform its obligations with respect to the Services and shall complete the Services in accordance with the schedule set forth in Exhibit A. Upon WRCOG’s request, the Organization shall inform WRCOG via email or letter of the current status of progress on the Services.

(e) Application for Reimbursement. Organization shall submit to WRCOG an itemized application for reimbursement in a format acceptable to WRCOG indicating the Services completed since commencement of the Services and since the last reimbursement. These applications shall be supported by receipts and other evidence of costs accrued and such other documentation as WRCOG may require. The Organization shall certify that the Services for which reimbursement is requested has been done.

(f) Accounting. Organization shall maintain an accounting system that accurately reflects all fiscal transactions and accounting information. At all times, the Organization accountant shall maintain the financial books and records of the Organization to be established pursuant to this MOU and maintained by the Organization separate and apart from other financial records and shall set forth all financial activity hereunder as a separate line item in the annual budget of the Organization.

(g) Records Retention and Inspection. Organization shall establish an official file containing adequate documentation of all actions taken with respect to the Project. Copies of the MOU, changes, amendments, letters, email correspondence, financial records, required reports, maps, field notes and supporting documents, and all other records pertaining to the use of financial assistance disbursed to the Organization hereunder shall be retained by the Organization and available to WRCOG for examination and for purposes of performing an audit for a period of three (3) years following the final payment of funds or until completion of any action and resolution of all issues which may arise as a result of an audit, whichever is later.

(h) Compliance with Laws/Permits. Organization shall, in all activities undertaken pursuant to this MOU, comply and cause its contractors, agents and employees to comply with all federal, state and local laws, statutes, orders, ordinances, rules, regulations, plans, policies and decrees. Without limiting the generality of the foregoing, Organization, at its sole cost and expense, shall obtain any and all permits which may be required by any law, regulation or ordinance for any activities Organization desires to conduct or have conducted pursuant to this MOU.

(i) *****INSERT MORE PROVISIONS AS NEEDED*****].

2.6 Termination. The WRCOG may terminate or suspend this MOU, in whole or in part by providing written notice to the other Party at least thirty (30) days prior to the effective date of termination, with or without cause. In cases of an emergency or a breach of this MOU, this MOU may be terminated immediately.

2.7 Insurance. The Organization shall obtain insurance of the types and in the amounts described below and satisfactory to the WRCOG.

(a) Commercial General Liability Insurance. Organization shall maintain occurrence version commercial general liability insurance or equivalent form with a combined single limit of not less than one million dollars (\$1,000,000) per occurrence and

the general aggregate limit not less than two million dollars (\$2,000,000). Such insurance shall:

(i) Include the WRCOG its officials, officers, employees, agents, and consultants as additional insureds and shall contain no special limitations on the scope of coverage or the protection afforded to the additional insureds;

(ii) Be primary with respect to any insurance or self-insurance programs covering the WRCOG, its officials, officers, employees, agents and consultants; and

(iii) Contain standard separation of insured provisions.

(b) Workers' Compensation Insurance. Organization shall maintain workers' compensation insurance with statutory limits and employers' liability insurance with limits of not less than \$1,000,000 per occurrence.

(c) Automobile Liability. Organization shall maintain automobile liability insurance for bodily injury and property damage including coverage for owned, non-owned and hired vehicles, in a form and with insurance companies acceptable to the WRCOG with limits of not less than \$1,000,000 combined single limit.

(d) Certificates of Insurance. Organization shall furnish the WRCOG with properly executed certificates of insurance and, if requested by the WRCOG, certified copies of endorsements and policies, which clearly evidence all insurance required under this MOU and provide that such insurance shall be not canceled, allowed to expire or be materially reduced in coverage, except on thirty (30) days' prior written notice to the WRCOG. The WRCOG shall have the sole discretion to determine whether the certificates and endorsements presented comply with the provisions of this MOU.

(e) Coverage Maintenance. Organization shall replace certificates, policies and endorsements for any insurance expiring prior to the termination of this MOU . Unless otherwise provided for in this MOU, Organization shall maintain such insurance from the execution of this MOU until completion of the Project.

(f) Licensed Insurer. Organization shall place such insurance with insurers having A.M. Best Company ratings of no less than A:VIII and licensed to do business in California, unless otherwise approved, in writing, by the WRCOG.

2.9 Indemnification. To the fullest extent permitted by law, Organization, its contractors, consultants, subcontractors, subconsultants, materialmen, suppliers, workers, successors, volunteers, and assigns (collectively, the "Organization Parties") shall, and hereby does, agree to indemnify, defend, and hold harmless WRCOG; and its elected and appointed officials, officers, directors, employees, agents, volunteers, successors, representatives, and assigns (collectively, the "WRCOG Parties"), from and against all damages, claims, liabilities, settlements, penalties, fines, costs, expenses, losses, or attorney and consultant fees and costs (collectively "Damages") incurred by WRCOG to the extent that the same arise or result from or are caused by the acts or

omissions of the Organization Parties in connection with their use of WRCOG property or the Project and/or in connection with the exercise of any other rights granted by this MOU with respect to WRCOG property or any part thereof; provided, however, that Organization shall not be obligated to indemnify, defend, or hold harmless the WRCOG Parties from and against any Damages to the extent that such Damages are caused by the sole negligence or willful misconduct of the WRCOG Parties. Organization indemnification obligation herein shall include, without limitation, the following: 1) any and all claims under workers' compensation acts and other employee benefit acts with respect to Organization's employees/volunteers or Organization's consultant's employees arising out of the Project, 2) liability for damages for death or bodily injury to person, (3) injury to, loss or theft of property; and 3) any failure or alleged failure to comply with any provision of law.

3. MISCELLANEOUS TERMS

3.1 Amendment. This MOU may be amended at any time by the mutual consent of the Parties by an instrument in writing signed by both Parties.

3.2 Construction; References; Captions. Since the Parties or their agents have participated fully in the preparation of this MOU, the language of this MOU shall be construed simply, according to its fair meaning, and not strictly for or against any Party. The captions of the various articles and paragraphs are for convenience and ease of reference only, and do not define, limit, augment, or describe the scope, content, or intent of this MOU.

3.3 Entire Agreement. This MOU constitutes the entire and integrated agreement with respect to the subject matter hereof and supersedes any and all prior and contemporaneous oral or written negotiations, representations or agreements.

3.4 Notices, Demands and Communications Between the Parties.

(a) Formal notices, demands and communications between Parties shall be deemed sufficiently given if: (i) by commercial overnight delivery; (ii) by messenger service for immediate personal delivery; or (iii) by electronic transmittal, including electronic mail and/or fax transmissions, subject to written verification of receipt by the receiving party. Such written notices, demands and communications may be sent in the same manner to such other addresses as either Party may from time to time designate by written notice to the other Party.

All notices, demands and communications shall be sent, as follows:

To WRCOG:

Western Riverside Council of
Governments
Attn: **Dr. Kurt Wilson**
3390 University Avenue, Suite #200
Riverside, CA 92501

To Organization

**California State University of San
Bernardino**
Attn: **Dr. Robert Stokes**
5500 University Parkway
San Bernardino, CA 92407

(b) Notices shall be deemed effective upon receipt or with respect to electronic transmission, upon receipt of written verification from the receiving party.

3.5 Counterparts. This MOU may be signed in counterparts, each of which shall constitute an original.

3.6 Laws and Regulations. Each Party shall keep itself fully informed of and in compliance with all local, state and federal laws, rules and regulations in any manner affecting the performance of this MOU, and shall give all notices required by law. Each Party shall be liable for all violations of such laws and regulations in connection with this MOU.

3.7 Third Party Beneficiaries. This MOU and the performance of the Parties obligations hereunder are for the sole and exclusive benefit of the Parties. No person or entity who or which is not a signatory to this MOU shall be deemed to be benefited or intended to be benefited by any provision hereof, and no such person or entity shall acquire any rights or causes of action against either of the Parties hereunder as a result of a Party's performance or non-performance of its obligations under this MOU.

3.8 Relationship of Parties. The Parties agree and intend that the Parties are independent contracting entities and do not intend by this MOU to create any partnership, joint venture, or similar business arrangement, relationship or association between them.

3.9 Governing Law. This MOU shall be governed by the laws of the State of California without regard to conflicts of laws principles. Any litigation or other legal proceedings which arise under or in connection with this MOU shall be conducted in a federal or state court located within or for Riverside County, California.

3.10 Waiver. No delay or omission in the exercise of any right or remedy of a non-defaulting Party on any default shall impair such right or remedy or be construed as a waiver. Either Parties' consent or approval of any act by the other Party requiring its consent or approval shall not be deemed to waive or render unnecessary its consent to or approval of any subsequent act of the other Party. Any waiver by either Party of any default must be in writing and shall not be a waiver of any other default concerning the same or any other provision of this MOU.

3.11 Rights and Remedies are Cumulative. Except with respect to rights and remedies expressly declared to be exclusive in this MOU, the rights and remedies of the Parties are cumulative and the exercise by either Party of one or more of such rights or remedies shall not preclude the exercise by it, at the same or different times, of any other rights or remedies for the same default or any other default by the other Party.

3.12 Severability. In the event that any one or more of the phrases, sentences, clauses, paragraphs, or sections contained in this MOU shall be declared invalid or unenforceable by a valid judgment or decree of a court of competent jurisdiction, such invalidity or unenforceability shall not affect any of the remaining phrases, sentences,

clauses, paragraphs, or sections of this MOU which are hereby declared as severable and shall be interpreted to carry out the intent of the parties hereunder.

3.13 Binding Effect. The terms of this MOU shall inure to the benefit of, and shall be binding upon, each of the Parties and their respective successors and assigns.

3.14 Authorized Representatives. The person or persons executing this MOU on behalf the Party warrant and represent that they have the authority to execute this MOU on behalf of that Party and that they have the authority to bind that Party to the performance of its obligations hereunder.

[SIGNATURES ON FOLLOWING PAGE]

**SIGNATURE PAGE TO
MEMORANDUM OF UNDERSTANDING BETWEEN
THE WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS AND
CALIFORNIA STATE UNIVERSITY OF SAN BERNARDINO**

IN WITNESS WHEREOF, the Parties hereby have made and executed this MOU as of the date first written above.

WESTERN RIVERSIDE COUNCIL
OF GOVERNMENTS

**CALIFORNIA STATE UNIVERSITY OF
SAN BERNARDINO**

By: _____
Dr. Kurt Wilson
Executive Director

By: _____
Dr. Robert Stokes
Department Chair

APPROVED AS TO FORM:

ATTEST:

By: _____
General Counsel
Best Best & Krieger, LLP

By: _____
Its:

EXHIBIT A

SCOPE OF SERVICES

WRCOG will issue up to six requests for studies to be completed by Organization, each study shall not exceed \$20,000.00 and are listed below:

Overview

This document provides an overview of Evaluation, Measurement, and Verification (EM&V) for ratepayer-funded energy efficiency programs and describes the Inland Regional Energy Network's (I-REN) approach for EM&V for their portfolio, informed by EM&V study concepts proposed in I-REN's approved Energy Efficiency Business Plan. Both California Public Utilities Commission (CPUC) and Portfolio Administrator (PA) led EM&V are informed by program logic models and EM&V approaches define the type outcomes and outputs and their respective data and savings claims. The goal of both EM&V efforts is to maximize transparency, inform portfolio planning, and in most cases, a PA's data collection informs CPUC evaluations.

For the purpose of this document, we will focus on PA-led EM&V. PA EM&V is procured, managed, and contracted by the PA. EM&V methods are selected for energy efficiency programs to determine how the program will measure energy savings and other outcomes and verify that the outcomes are accurate.

PA-led EM&V can inform program target setting, value metrics, and highlight opportunities for improved data and measurement collection. In addition, program EM&V may help inform the PA on an implementer's performance towards established program goals and targets, CPUC metrics and indicators, and PA determined value metrics.

University Collaboration: I-REN intends to collaborate with local universities (Cal State San Bernardino or UC Riverside Center for Community Solutions) to engage with local academic research.

Types of Evaluations and Studies

EM&V activities shall be planned and implemented to achieve the following core objectives in order to support the Commission's oversight function of ensuring the efficient and effective expenditure of ratepayer funds within the energy efficiency portfolios. All activities should be undertaken to meet the overarching goals of clarity, consistency, cost-efficiency, and timeliness. The core objectives are:

1. Savings Measurement and Verification - Measurement and verification of savings resulting from energy efficiency measures, programs, and portfolios serve the fundamental purpose of developing estimates of reliable load impacts delivered through ratepayer-funded efficiency efforts. Measurement and verification work

should reflect a reasonable balance of accuracy and precision, cost, and certainty, and be designed for incorporation into procurement planning activities.

2. Program Evaluation - Evaluation of program-specific qualitative and quantitative measures, such as the program performance metrics discussed earlier in this decision and process evaluations, serves a key role in providing feedback for the purposes of improving performance and supporting forward-looking corrections to utility programs and portfolios. In order to maximize return on ratepayer dollars, program evaluations must be completed on a timeline which informs mid-course corrections and/or program planning for the following cycle.
3. Market Assessment - In a constantly evolving environment, market assessments are an essential EM&V product needed to set the baseline for strategic design and improvement of programs and portfolios. Saturation studies, surveys of emerging technologies and other such analyses which inform estimates of remaining program potential and forward-looking goal-setting are key aspects of market assessment.
4. Policy and planning support - Consistent with prior program cycles, it is essential to reserve funding to support overarching studies and advisory roles which support Commission policy goals. Over the last program cycle this has been inclusive of potential and goals studies, maintenance of DEER database, developing databases of best practices for program design and delivery, program design mix, and other means which support the Commission's oversight role, but do not fall under the core EM&V categories described above.
5. Financial and Management audit - Supporting the Commission's oversight function of ensuring the efficient and effective expenditures of ratepayer funds within the utilities' energy efficiency portfolios is another objective of EM&V activities. Rigorous financial and management audits overseen by Commission staff will be critical in ensuring that the utilities' general and administrative costs, and other program expenditures are prudent and reasonable.

I-REN Sectors and Programs

I-REN has three sectors, each with their own programs. The sectors are: **Public Sector**, **Codes and Standards**, and **Workforce Education and Training**. The following sections include suggested EM&V activities for the Public Sector, informed by EM&V plans in I-REN's Business Plan.

I-REN Public Sector

I-REN Public Sector has two programs: Technical Assistance and Strategic Energy Planning Program and Public Buildings NMEC Program.

Technical Assistance and Strategic Energy Planning Program: The goal of this program is to provide local governments with support and resources to develop and implement their strategic energy plans and energy efficiency projects.

Public Buildings NMEC Program: The goal of this program is to help local governments afford and fund a range of holistic energy efficiency upgrades.

Summary of I-REN Public Sector EM&V Activities			
Program	Project Description	Objective	Potential EM&V Methods
Technical Assistance and Strategic Energy Planning Program	STUDY 1: Identify barriers preventing agency progress through project pipeline.	Determine obstacles that jurisdictions face during project exploration.	Gap assessment including a qualitative interview and a short survey.
Technical Assistance and Strategic Energy Planning Program	STUDY 2: Assess which jurisdictions meet equity criteria.	Evaluate the number of equity jurisdictions participating in the public sector.	Market study to evaluate the number of jurisdictions that meet equity criteria.
Public Buildings NMEC program and Technical Assistance and Strategic Energy Planning Program	STUDY 3: Identify which programs agencies have participated in previously.	Assess what programs agencies have participated in to inform current programs.	Evaluation surveys, direct email outreach.

Below is a detailed breakdown of each study, including questions the study aims to answer and potential ways I-REN can collaborate with local universities.

Study 1	
Project Description:	Identify barriers preventing agency progress through project pipeline.
Objective:	Determine obstacles that jurisdictions face during project exploration.
Questions this study aims to answer:	<ul style="list-style-type: none"> • What do agencies need to pursue a project? • Will bridge financing assist agencies in pursuing a project? • What local needs or funds are needed to modernize facilities? • Will an I-REN fellow assist agencies in pursuing a project? • What internal and external barriers do agencies face when launching a project?

Methodology:	<p>Gap assessment including a qualitative interview and a short survey.</p> <ul style="list-style-type: none"> • First conduct a qualitative interview with select individuals to learn potential barriers (open-ended questions). • Then conduct a short survey to a wider audience to learn if other agencies are facing the same barriers (multiple choice questions with optional open-ended questions). <p>Agencies within I-REN territories will be interviewed via phone call and surveyed via email.</p>
Potential University Collaboration:	<ul style="list-style-type: none"> • Conduct qualitative interviews over the phone. • Distribute short surveys to agencies within I-REN's territory. • Gather and report survey responses.

Study 2	
Project Description:	Assess which jurisdictions meet equity criteria.
Objective:	Evaluate the number of equity jurisdictions participating in the public sector.
Questions this study aims to answer:	<ul style="list-style-type: none"> • Which agencies are benefitting from I-REN's Public Sector are considered equity? • Which agencies within the I-REN territory meet the CPUC's equity definition? • Is there an untapped market of public agencies or public agency types that are not in touch with the RENs? • How can I-REN expand into more equity jurisdictions?
Methodology:	<p>Market study to evaluate the number of jurisdictions that meet equity criteria.</p> <ul style="list-style-type: none"> • Evaluate agencies that have participated in I-REN's Public Sector and assess if they are considered equity. • Conduct a market study to all of I-REN's jurisdictions to determine if any equity jurisdictions are not utilizing I-REN's resources.
Potential University Collaboration:	<ul style="list-style-type: none"> • Distribute market assessment study to survey agencies. • Evaluate and report responses. • Determine which areas within I-REN's territories meet CPUC equity criteria.

Study 3	
Project Description:	Identify which programs agencies have participated in previously.
Objective:	Assess what programs agencies have participated in to inform current programs.

Questions this study aims to answer:	<ul style="list-style-type: none"> • Are these specific programs and/or program types in the past that agencies have had success with (e.g. Direct Install or Deemed rebates)? • How can I-REN's current programs address issues faced in past programs?
Methodology:	<p>Evaluation surveys</p> <ul style="list-style-type: none"> • Direct email outreach to agencies within I-REN's Public Sector with open-ended survey questions.
Potential University Collaboration:	<ul style="list-style-type: none"> • Distribute emails to agencies within I-REN's territory. • Gather and report responses. • Research programs that agencies have participated in previously. • Compare and contrast past programs with I-REN's programs.

I-REN Codes and Standards

I-REN Codes and Standards has two programs: C&S Training and Education Program and Technical Support Program.

C&S Training and Education Program: The goal of this program is to improve understanding of energy efficiency codes and standards among local building departments and the building industry to increase implementation and compliance.

Technical Support Program: The goal of this program is to deliver locally informed resources and tools that streamline code compliance and enforcement and increase permit closeout. Outreach and community engagement activities associated with both programs seek to make code compliance a valuable element of the region's energy efficiency goal attainment.

Summary of I-REN Codes & Standards EM&V Activities			
Program	Project Description	Objective	Potential EM&V Methods
All	STUDY 1: Identify characteristics of jurisdictions that have little to no participation in I-REN's program offerings.	Increase the number and diversity of jurisdictions participating in I-REN's program offerings.	Desk review of jurisdictions with low engagement and short survey to those jurisdictions.
Training and Education Program	STUDY 2: Review current training formats and survey preferred training formats.	Learn preferred training formats and offer a variety to I-REN participants.	Desk review of current training formats and survey training participants.
Technical Assistance	STUDY 3: Assess who does not pull permits	Understand reasons permits are not being	Anonymous survey to learn permit processes.

Summary of I-REN Codes & Standards EM&V Activities

	and survey why permits are not being pulled.	pulled, to inform I-REN interventions to improve permit compliance.	
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Below is a detailed breakdown of each study, including questions the study aims to answer and potential ways I-REN can collaborate with local universities.

Study 1	
Project Description:	Identify characteristics of jurisdictions that have little to no participation in I-REN's program offerings.
Objective:	Increase the number and diversity of jurisdictions participating in I-REN's program offerings.
Questions this study aims to answer:	<ul style="list-style-type: none"> • Which jurisdictions have formal building departments? • Which jurisdictions contract out their building departments? • What are common characteristics of jurisdictions that I-REN has little outreach to? • What barriers do these jurisdictions face regarding access to materials and resources?
Methodology:	Desk review and short survey. <ul style="list-style-type: none"> • Research and report which jurisdictions I-REN does not have a strong relationship with (jurisdictions that are not utilizing I-REN's resources). • Research and report the type of building departments these jurisdictions have. • Survey these jurisdictions to learn how I-REN can engage with them.
Potential University Collaboration:	<ul style="list-style-type: none"> • Desk review of jurisdictions with low engagement. • Research jurisdiction building departments. • Distribute short surveys to jurisdictions within I-REN's territory. • Gather and report survey responses.

Study 2	
Project Description:	Review current training formats and survey preferred training formats.
Objective:	Learn preferred training formats and offer a variety to I-REN participants.
Questions this study aims to answer:	<ul style="list-style-type: none"> • Do training participants prefer a method of training that I-REN does not already offer?

	<ul style="list-style-type: none"> • Would a certification process increase the number of participants? • Would a training course rather than a webinar increase the number of participants? • What are preferred methods of training?
Methodology:	<p>Desk review of current training formats and survey training participants.</p> <ul style="list-style-type: none"> • Review current training offerings. • Survey past training participants and other individuals within I-REN territory to learn what their preferred method of training is.
Potential University Collaboration:	<ul style="list-style-type: none"> • Desk review of training offerings (I-REN and others). • Distribute survey to training participants and others in I-REN's jurisdictions. • Report survey findings.

Study 3	
Project Description:	Assess who does not pull permits and survey why permits are not being pulled.
Objective:	Understand reasons permits are not being pulled, to inform I-REN interventions to improve permit compliance.
Questions this study aims to answer:	<ul style="list-style-type: none"> • Who is not pulling permits and why? • Are there underserved agencies that are not pulling permits? • Would an incentive program increase the amount of permits pulled?
Methodology:	<p>Anonymous survey to learn permit processes.</p> <ul style="list-style-type: none"> • This study is to learn permit processes, rather than monitor code enforcement. Therefore, an anonymous survey to builders may lead to more honest results about why permits are not being pulled. • Survey architects, builders, contractors, etc.
Potential University Collaboration:	<ul style="list-style-type: none"> • Research companies that have recently applied for permits through business licensing departments. • Distribute anonymous survey to agencies and building individuals within I-REN's territories. • Report survey findings.

I-REN Workforce Education & Training

I-REN WE&T has two programs: Workforce Development Program and WE&T Training and Education Program.

WE&T Training & Education Program: The goal of this program is to create a robust local network of training programs that increase capacity and knowledge related to energy efficiency in the building industry.

Workforce Development Program: The goal of this program is to increase the number of skilled energy efficiency workers in the region.

Summary of I-REN Public Sector EM&V Activities			
Program	Project Description	Objective	Potential EM&V Methods
Workforce Development Program	STUDY 1: Identify and assess factors that lead to fellow retention.	Evaluate the needs of site hosts to hire fellows past the fellowship program.	Survey site hosts and data review of fellows.
All	STUDY 2: Identify metrics that track the success of the WE&T program.	Develop metrics that can be used to measure the success of the WE&T programs.	Data analysis of performance factors that can measure success.
Workforce Development Program	STUDY 3: Examine fellows post-fellowship to evaluate career pathway.	Learn what factors influence the career trajectory of fellows.	Desk review of fellow applications and survey for fellows post-fellowship.

Below is a detailed breakdown of each study, including questions the study aims to answer and potential ways I-REN can collaborate with local universities.

Study 1	
Project Description:	Identify and assess factors that lead to fellow retention.
Objective:	Evaluate the needs of site hosts to hire fellows past the fellowship program.
Questions this study aims to answer:	<ul style="list-style-type: none"> • What do site hosts need fellows to be better at in order to get a full-time job? • What factors are cities looking at when deciding to hire a fellow? • What influences a city in retaining a fellow? • What factors do fellows that are retained have? • Where are fellows applying from? • Are the fellows coming from a disadvantaged community? • Is the site host in a disadvantaged community?
Methodology:	<p>This study will evaluate two groups: Site hosts that have participated in the fellowship program; Fellows.</p> <p>Survey site hosts.</p> <ul style="list-style-type: none"> • Conduct a survey with factors listed to learn site hosts preferences.

	<ul style="list-style-type: none"> • Survey can also include open-ended questions for additional input. • Survey will be sent to cities that have hosted fellows. <p>Data review of fellows.</p> <ul style="list-style-type: none"> • Examine characteristics of fellows (hired vs not hired)
Potential University Collaboration:	<ul style="list-style-type: none"> • Collect list of cities that have hosted WE&T fellows. • Distribute survey to site hosts. • Examine past fellows and highlight key characteristics. • Report findings.

Study 2	
Project Description:	Identify metrics that track the success of the WE&T program.
Objective:	Develop metrics that can be used to measure the success of the WE&T programs.
Questions this study aims to answer:	<ul style="list-style-type: none"> • What metrics can be used to track the performance of the WE&T programs? • What are metrics for outcomes related to next steps from the Market Assessment Survey? • What are data collection tools/strategies that can be used to collect WE&T metrics?
Methodology:	<p>Data analysis of performance factors that can measure success.</p> <ul style="list-style-type: none"> • Research I-REN WE&T offerings and similar programs. • Recommend data collection practices and metrics to measure program success.
Potential University Collaboration:	<ul style="list-style-type: none"> • Research performance factors for the WE&T programs. • Brainstorm potential metrics that can be tracked to measure performance.

Study 3	
Project Description:	Examine fellows post-fellowship to evaluate career pathway.
Objective:	Learn what factors influence the career trajectory of fellows.
Questions this study aims to answer:	<ul style="list-style-type: none"> • What degrees do fellows have and in what subjects? • What do fellows do after the fellowship program? • Are fellows finding energy related jobs after the fellowship program?
Methodology:	<p>Desk review of fellow applications and survey for fellows post-fellowship.</p> <ul style="list-style-type: none"> • Review traits of fellows when they applied to the program. • Follow-up survey for fellows that have completed the program to learn what career they have or degrees earned.

**Potential University
Collaboration:**

- Assess traits of fellows from fellowship applications.
- Distribute survey to fellows.
- Report survey findings.

EXHIBIT B

RATES

[CSUSB TO INSERT HOURLY RATES**]**



Inland Regional Energy Network I-REN Executive Committee

Staff Report

Subject: I-REN Energy Efficiency Annual Report for Calendar Year 2024
Contact: Benjamin Druyon, WRCOG Program Manager, bdruyon@wrcog.us, (951) 405-6727
Date: April 15, 2025

Recommended Action(s):

1. Receive and file.

Summary:

Each year in the spring, the California Public Utilities Commission (CPUC) requires each energy efficiency (EE) portfolio administrator (PA) to submit an Annual Report describing its achievements in the preceding year and detailing its plans for the year ahead. I-REN submitted its first Annual Report in spring 2023, recounting its activities in 2022 as a new Regional Energy Network (REN), and laying out goals for the 2023 calendar year. I-REN submitted its second Annual Report for 2023, affirming how the goals set in its 2022 Annual Report have been achieved and looking ahead to further achievements in 2024. Now, I-REN will submit its 2024 Annual Report.

Discussion:

Background

The CPUC requires PAs such as I-REN to provide an annual report detailing their ratepayer-funded energy efficiency programs' performance in the prior calendar year, along with their plans for the current calendar year. Typically, REN and Community Choice Aggregator (CCA) PAs' annual reports are due on April 15th each year, and utility PAs' annual reports are due on May 1st.

The annual report encompasses the following, at minimum, as required by CPUC in Decision (D.) 21-05-031:

1. Detailed portfolio-, sector-, and program-level annual and cumulative (over the portfolio period) accomplishments, including data on energy savings, budget, cost-effectiveness, and metrics.
2. A prospective overview, in narrative format, that includes future plans to meet and/or exceed the cumulative four-year goals and cost-effectiveness requirements, and any other PA specific goals or metrics.

The 2024 Annual Report is I-REN's third Annual Report submittal, having previously submitted Annual Reports for calendar years 2022 and 2023.

Annual Reports are submitted to the CPUC via email to the CPUC Energy Division as well as via upload to the California Energy Data and Reporting System (CEDARS) online database. Upon submittal, Annual Reports are publicly available in the CEDARS Documents area.

Present Situation

As detailed in the I-REN 2024 Annual Report, 2024 was a year of significant milestones and growth across I-REN's portfolio. After launching select quick-start activities in the latter half of 2023, I-REN embarked on its first full year of those programs operations in 2024 and saw participation increase across its portfolio. In parallel, I-REN initiated other program activities in close coordination with local, regional, and statewide stakeholders.

As envisioned in its Business Plan, I-REN's portfolio is now delivering tangible, cross-cutting public interest impacts and increasing equitable access to EE in the Inland Empire region.

- I-REN's Fellowship workforce initiative provides job opportunities and experiential energy education to participants who are placed at local jurisdictions to support energy projects. By funding the Fellows, I-REN has increased local agencies' ability to pursue energy efficiency, and I-REN's Public Sector pipeline now has 26 projects in progress where I-REN Fellows have direct involvement in supporting project completion.
- The first I-REN Public Sector Normalized Metered Energy Consumption (NMEC) Project completed construction in 2024 and is set to deliver energy and bill savings for public facilities serving equity communities. All projects in the I-REN Public Sector pipeline serve equity communities, and energy road mapping and benchmarking services provided in 2024 were for 100% equity community-serving public facilities.
- I-REN is leading the way with equitable energy code training for public and private sector building professionals, having hosted the state's first REN-led, no-cost, multilingual technical training on the energy code - a four-part module on air conditioning and heat pumps in Spanish.

I-REN continues to be guided by input from its communities and stakeholders. In the past year, I-REN further expanded opportunities for community and industry input to its program designs and operations by convening stakeholders in all sectors of its portfolio, including roundtables, working groups, energy forums, and more.

In 2024, I-REN also coordinated closely with other PAs to fulfill regulatory obligations as well as to enhance program offerings and ensure judicious use of ratepayer funds. When the CPUC approved portfolios in D.23-06-055, it ordered that the PAs work together to examine various topics and submit joint advice letters. I-REN has been a diligent contributor to those efforts, embracing the opportunity to work collaboratively with other PAs and advocate for equity and the value that RENs bring to the EE landscape. I-REN also worked closely with other PAs in the region to avoid program overlap and to collaborate in ways that bring added value to participants.

Going into 2025, I-REN is continuing to expand program activities and deliver tangible benefits for not only program participants but also the region as a whole. While driving outcomes in its current portfolio, I-REN will also look to the future. I-REN's 2028-2035 portfolio application will be developed using insights gained from early program implementation, along with feedback from stakeholders regarding the energy efficiency and resilience needs of the Inland Empire.

Key Program Performance Metrics

The following key achievements by I-REN’s programs and many other performance metrics are presented in the 2024 Annual Report.

- Public Sector
 - 50+ agencies leveraged Public Sector program offerings
 - 70+ attendees participated in I-REN’s first Public Sector Working Group
 - \$1.8M in funding secured for agencies by I-REN
 - Projects in the development pipeline are estimated to produce \$8.5M in utility bill savings
- Codes & Standards Sector
 - 13 energy code trainings offered with 214 attendees
 - 157 training attendees awarded continuing education unit certificates
 - 60% increase in training registrants from 2023
 - First REN to offer a Spanish language energy code training
 - 2 regional energy code forums hosted
- Workforce Education & Training Sector
 - 147 partnerships supporting energy efficiency
 - 14 Fellows placed at agencies to support energy efficiency and resiliency projects
 - Workforce assessment completed to inform future program activities

I-REN Budget and Spending

Calendar Year 2024 Budget Forecast and Actual Expenditures as documented in the 2024 I-REN Annual Report are shown below.

Table 1: I-REN 2024 Budget Forecast:

Program ID	Program Name	2024 Budget
IREN-PUBL-001	Technical Assistance and Strategic Energy Planning Program	\$3,062,464.73
IREN-PUBL-002	Public Buildings NMEC Program (Cash for Kilowatts)	\$2,600,713.94
IREN-CS-001	C&S Training and Education Program	\$983,912.05
IREN-CS-002	Technical Support Program	\$652,782.63
IREN-WET-001	WE&T Training and Education Program	\$1,242,206.71
IREN-WET-002	Workforce Development Program	\$1,558,915.14
Program Subtotal		\$10,100,995.19
IDSM		\$243,000.00
Portfolio Support PA Costs		\$664,950.27
EM&V		\$458,706.06
Total I-REN 2024 Budget		\$11,467,651.52

Table 2: I-REN 2024 Actual Expenditures:

Program ID	Admin	Marketing & Outreach	Direct Implementation	Incentives	Total
IREN-PUBL-001	\$370,797.11	\$50,660.05	\$2,371,252.26	\$0.00	\$2,792,709.42
IREN-PUBL-002	\$275,684.89	\$31,727.83	\$1,378,221.93	\$0.00	\$1,685,634.65
IREN-CS-001	\$45,521.56	\$15,632.87	\$620,073.94	\$0.00	\$683,228.37
IREN-CS-002	\$40,903.10	\$11,449.61	\$199,321.72	\$0.00	\$251,674.43
IREN-WET-001	\$248,202.54	\$11,581.39	\$501,492.20	\$0.00	\$761,276.13
IREN-WET-002	\$98,917.59	\$11,581.39	\$384,616.34	\$0.00	\$495,115.32
IREN-EMV-001	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
IREN-MS-PortfolioSupport	\$8,965.85	\$0.00	\$0.00	\$0.00	\$8,965.85
IREN-CS-PortfolioSupport	\$8,965.85	\$0.00	\$0.00	\$0.00	\$8,965.85
IREN-IDSM-Equity-001	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
IREN-Equity-PortfolioSupport	\$35,863.53	\$0.00	\$0.00	\$0.00	\$35,863.53
I-REN Total	\$1,135,822.02	\$132,633.14	\$5,454,978.39	\$0.00	\$6,723,433.55

I-REN Savings and Cost-Effectiveness Results

Savings and cost-effectiveness results of I-REN's portfolio are shown below. A few important notes regarding these results:

- RENs are not held to a cost-effectiveness threshold, unlike utility and CCA PAs that must produce a 1.0 or greater Total Resource Cost test result. However, the CEDARS database calculates cost-effectiveness ratios for REN portfolios for informational purposes.
- Negative therm savings occur as a result of installing more efficient light technologies that give off less heat than incandescent bulbs, therefore causing an interactive effect in which a gas furnace will utilize more therms to heat the facilities. These engineering calculations are required for claiming savings through a Normalized Metered Energy Savings program such as I-REN's Cash for Kilowatts Program.

Table 3: I-REN 2024 Savings and Cost-effectiveness Metrics:

Metric	2024 Result
Total System Benefit (dollar value of benefits provided to the energy system)	\$108,361.00
Total Resource Cost (TRC) ration	0.023050406
First Year Net Kilowatt-hour (kWh) energy savings	166,248.00

First Year Net Kilowatt (kW) demand savings	14.00
First Year Net Therm savings	(703.00)
Lifecycle Net kWh energy savings	2,659,968.00
Lifecycle Net Therm savings	(11,252.00)

Next Steps:

In D.23-06-055, the CPUC created a new requirement for PAs to present their Annual Reports to the California Energy Efficiency Coordinating Committee (CAEECC). I-REN will join the other PAs in presenting its Annual Report at the August 5, 2025, Annual CAEECC Portfolio Performance Report Review Meeting.

Prior Action(s):

April 16, 2024: The I-REN Executive Committee received and filed.

Financial Summary:

The 2024 I-REN Annual Report reflects spending activities through calendar year 2024. I-REN has a six-year, \$65.6M budget, from 2022-2027. From 2022-2024, I-REN has spent approximately \$13M, leaving approximately \$52.6M to be programmed for 2025-2027.

Attachment(s):

None.



Inland Regional Energy Network

I-REN Executive Committee

Staff Report

Subject: I-REN 2023-2027 Strategic Plan Update
Contact: Benjamin Druyon, WRCOG Program Manager, bdruyon@wrcog.us, (951) 405-6727
Date: April 15, 2025

Recommended Action(s):

1. Receive and file.

Summary:

The purpose of this item is to provide an update regarding I-REN's 2023-2027 Strategic Plan.

Discussion:

Background

In 2023, I-REN developed a five-year Organizational Strategic Plan (Strategic Plan) to proceed with the launch and rollout of its programs, to ensure effective and efficient use of California Public Utilities Commission (CPUC) funding, identify clear priorities and actions, and align activities and engagement across REN member agencies.

The process to develop the Strategic Plan included analysis of I-REN best practices and engagement with all the agencies, staff, and I-REN Executive Committee members. These relationships are central to the organization's path to success. To that end, the Strategic Planning effort included staff reaching out to every member agency, as well as other partners, to share information and gather input.

The resulting Strategic Plan was designed for use by the internal team and Executive Committee, and will serve as a public-facing document to share the direction and focus of I-REN with cities, tribes, and other government partners in the local region.

The goals established in the Strategic Plan are shown below:

1. **Cohesive Region:** I-REN operates as a cohesive regional program and will make available and distribute benefits equally throughout the region with a fair allocation of resources and services to I-REN's Councils of Government (COGs) and member agencies.
2. **First Two Years:** I-REN will focus on the delivery of positive tangible impacts to the region through a successful rollout and launch of programs.
3. **Awareness and Relationships:** I-REN will actively engage with all member agencies, special

districts, and partners and strive to establish them as active participants.

4. **Internal Organization:** I-REN will be an effective and efficient organization, characterized by agility, responsiveness, and accountability.

Based on these goals, I-REN identified the following priorities and key activities.

- **Equal Benefits Region-wide:** Establish tools and approaches to offer equal benefits for COGs and member agencies.
- **Program Development and Launch:** Ensure successful launch of programs in the first two years to help build I-REN's momentum.
- **Regional Engagement:** Ensure that the diverse voices of the region are engaged and part of the development of the programs.
- **Strong and Successful Organization:** Create the foundation for an effective and responsive organization.

The Strategic Plan was officially approved by the Executive Committee in January 2024.

In conjunction with the Strategic Plan, the internal team worked with the consultant team to create an actionable Implementation Plan that identifies timelines for each action and details the roles and responsibilities of staff in completing these actions.

Over the past year, I-REN has made substantial progress toward the Strategic Plan goals by implementing the strategies identified in the Implementation Plan. Examples of this progress include but are not limited to the following:

- **Goal 1:** Orientations, forums, and one-on-one discussions have been conducted to gather information on member agencies' needs throughout the region. Marketing and branding guidelines have been developed to ensure a cohesive regional identity for I-REN.
- **Goal 2:** Unique value metrics have been developed to track performance. I-REN has established consistent communication with program implementers and the CPUC. Positive, tangible impacts have been delivered to the region through energy assessments and roadmaps, energy code trainings and continuing education credits, and fellowship opportunities for job seekers to support local agencies with energy projects.
- **Goal 3:** Program-focused surveys have been conducted for each sector to assess awareness and needs in the region. I-REN is an active member and participant of organizations such as the California Climate and Energy Collaborative, the Local Government Sustainable Energy Coalition, and the California Energy Efficiency Coordination Committee. I-REN works closely with other RENs to share best practices, coordinate regulatory responses, and overall increase the impact and influence of the local government program administrators.
- **Goal 4:** I-REN has provided access to training resources to staff to increase staff knowledge about program topics, and has identified leads / co-leads for programs to help establish leadership and implementation structure.

Present Situation:

Discussions about the Strategic Plan have been happening in tandem with the 2028-2035 I-REN Business Plan application discussions, as they are closely related and the outcome of the Strategic Plan will influence the Business Plan application. WRCOG and its COG partners - the Coachella Valley Association of Governments and the San Bernardino Council of Governments - have presented to their respective committees for feedback on the Business Plan application.

I-REN staff and consultants are conducting research to further explore the energy efficiency programs available to the region, as was presented in the February 2025 staff report regarding the Business Plan process. This research will focus on program availability in the region, eligibility requirements for participation, program benefits offered to participants, and other key characteristics to help identify potential gaps in the marketplace where I-REN could supplement existing programs to help meet the needs of Inland Empire communities.

As noted in the February 2025 Staff Report on this topic, I-REN is conducting a 2025 Goals and Planning Workshop to help I-REN refine the organization's goals and priorities for the years ahead and help to inform the upcoming Business Plan submittal. The Workshop is a half-day, in-person meeting scheduled for the morning of the April 2025 Executive Committee meeting.

Following the Workshop, the Frontier Energy consultant team (with leadership from subcontractor BluePoint Planning) will provide a presentation and facilitate a discussion with the I-REN Executive Committee members at the afternoon meeting to continue gathering input and perspectives regarding the Strategic Plan and Implementation Plan. Broadly, the presentation is anticipated to encompass, but not necessarily be limited to, the following:

- Background on the 2023 process that developed the Strategic Plan and Implementation Plan
- Overview of the morning workshop discussion
- Presentation of results from surveys to:
 - Executive Committee members
 - I-REN partners (e.g., member agencies, community organizations, program implementation consultants)
 - Staff
- Discussion to gather further input from Executive Committee members on the Strategic Plan and Implementation Plan

Next Steps:

The Strategic Plan and Implementation Plan are intended to guide I-REN energy efficiency portfolio operations, to ensure effective and efficient use of CPUC funding, identify clear priorities and actions, and align activities and engagement across REN member agencies. Input gathered from the Executive Committee and other stakeholders will inform the continuing discussion around I-REN's February 2026 Business Plan Application filing for programs in calendar years 2028-2035.

As I-REN's Business Plan is developed, the Strategic Plan and Implementation Plan will evolve to ensure I-REN continues as a well-established, effective, and impactful organization in the years ahead.

Prior Action(s):

February 18, 2025: The I-REN Executive Committee received and filed.

January 16, 2024: The I-REN Executive Committee approved the 2023 - 2027 I-REN Strategic Plan.

Financial Summary:

Activities related to this item are included in the approved WRCOG Fiscal Year 2024/2025 budget under the I-REN Fund (180).

Attachment(s):

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

[Attachment 2 - I-REN 2023-2027 Implementation Plan](#)

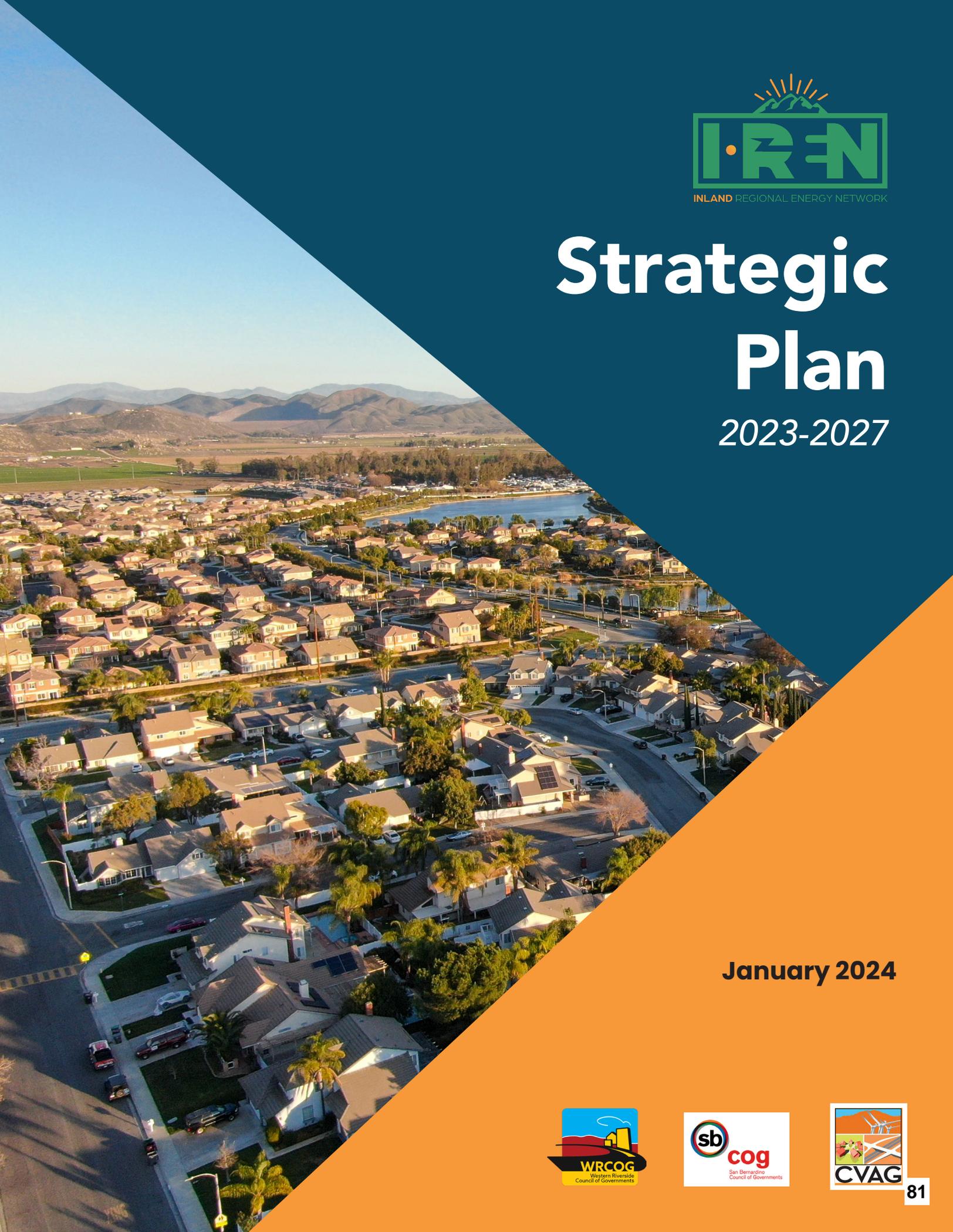
Attachment

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 and 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, 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 and Training, Codes and 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
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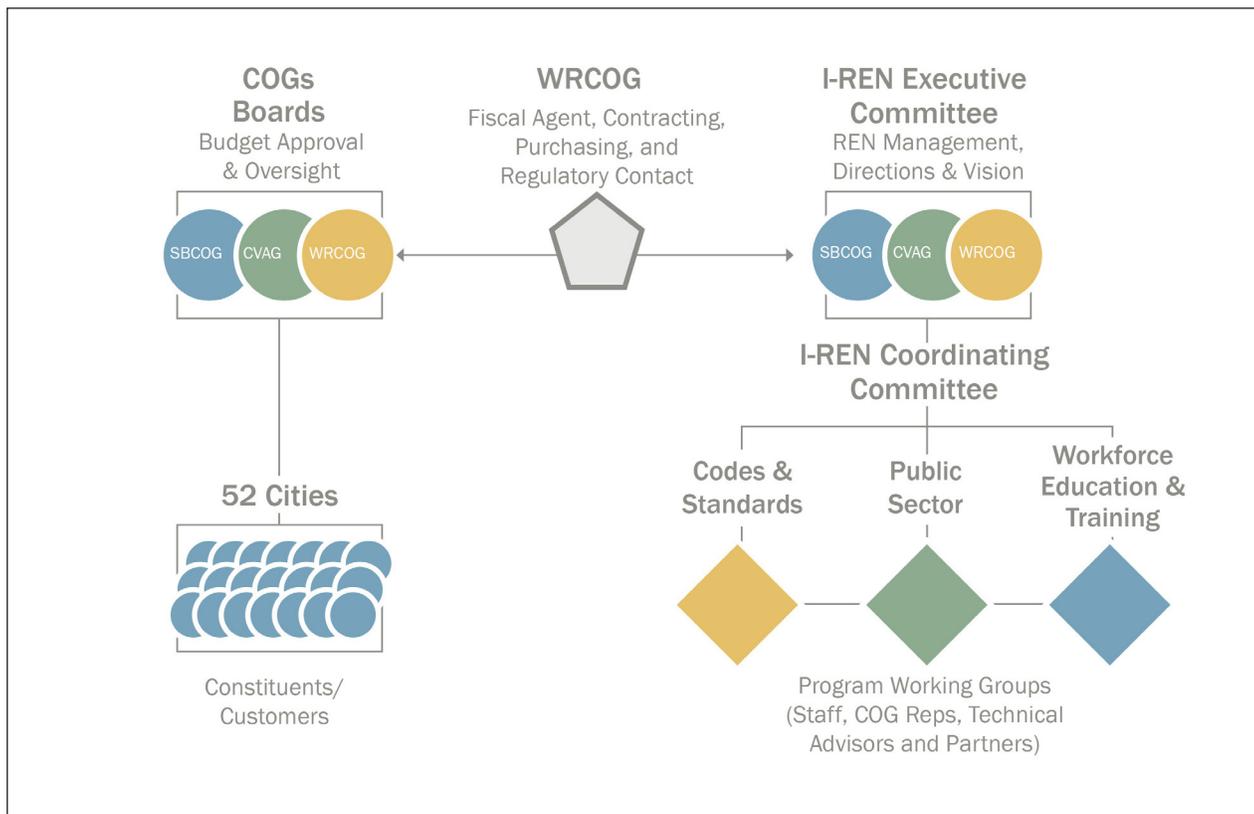
Introduction



from many workers. I-REN sees an opportunity to strengthen its workforce by delivering trainings locally and using regional connections, especially with the Community Colleges and CSUs, and 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 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 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 CAAEEC.

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 Government (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 Government (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.

Executive Committee

Oscar Ortiz, City of Indio
Debroah Robertson, City of Rialto
Curt Hagman, County of San Bernadino
Art Bishop, Town of Apple Valley
Jacque Casillas, City of Corona
Chris Barajas, City of Jurupa Valley
Crystal Ruiz, City of San Jacinto

I-REN Staff

Casey Dailey, Director of Energy and Environmental Programs WRCOG
Benjamin Druyon, Program Manager WRCOG
Tyler Masters, Program Manager WRCOG
Karina Camacho, Senior Staff Analyst WRCOG
Cheryl Chesnut, Program Manager SBCOG
Kelly Lynn, Chief of Air Quality and Mobility Programs, SBCOG
Stacey Morales, Management Analysis SBCOG
David Freedman Program Manager CVAG
Jacob Alvarez, Program Manager - Energy & Sustainability CVAG
Erica Felci, Chief Operating Officer, CVAG

BluePoint Planning - Strategic Planning

Mindy Craig, Principal-in-Charge
Allisia Sandoval, Project Associate

Frontier Energy

Nancy Barba, Director
Margaret Marchant, Program Manager

Attachment

I-REN 2023-2027

Implementation Plan

Goal 1

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.

Anticipated Outcome

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 is in line with CPUC guidance.

Strategic Objective	Strategies	Timeline	Frequency	Status
1.1 Work collaboratively and proactively with the I-REN Executive Committee to inform budget-making, resource allocation, and program development, ensuring responsiveness and agile decision-making.	Conduct an annual strategic planning session with the Executive Committee to identify progress, opportunities, and any strategic elements for the Executive Committee to address.	January Annually	Ongoing	On Track
	Establish clear budgeting processes to enable effective engagement by Executive Committee and enable appropriate authority for staff implementation.	January and July Annually	Ongoing	On Track
	Document agreed protocols and processes to streamline critical approvals and activities that cannot wait for quarterly EC meetings within existing documentation.	Feb 2024		Complete
	Develop onboarding education process and materials for orienting new Executive Committee members, and other key partners.	2023		Complete
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.	Establish clear protocols and processes for maintaining and updating shared database and communicating changes.	2023		Complete
	Provide regular communications to members to encourage them to use the BUC platform and to participate and learn about opportunities for their communities.	Initial Outreach; 2024 Ongoing	Ongoing	On Track
	Ensure there are trained and dedicated staff to manage and support the BUC platform at the regional level and agency level.	Q1 2024	Ongoing	On Track
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.	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.	Q4 2023 - Q1 2024; ongoing outreach	Ongoing	On Track
	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.	Q2 2024	Ongoing	On Track

In concert with the Community Roundtable (Connect to S3.4), develop and design outreach and engagement approaches to ensure access, enable flexibility, limit administrative burden for various users needs.	Q4 2024	Ongoing	On Track
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)	Q1 2024		Complete
Marketing & branding guidelines.	Q3 2023		Complete
Form guiding principles for accountability and management among COGs around contract compliance, metrics, benchmark parameters, and contract review. Connect to annual reporting.	Q4 2024	Ongoing	On Track
Ensure all parties support and provide accurate reporting, and analyze trends to improve KPIs, and identify other contributing variables to program success. Inputs for the Annual Report.	March 1 Annually	Ongoing	On Track

Goal 2

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

Desired Outcome

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

Strategic Objective	Strategies	Timeline	Frequency	Status
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.	Identify and prioritize disadvantaged communities and underserved areas that need assistance the most, in line with CPUC guidance.	Q2 2024	Ongoing	On Track
	Identify gaps and needs for data and conduct market research and engagement to make informed decisions about program priorities.	Q4 2024	Ongoing	On Track
	Determine program areas that have potential for greatest impact and ease of implementation to focus on first.	Q2 to Q4 2024	Ongoing	On Track
	Operationalize performance feedback to institute changes to programs as needed and make possible to address misalignment or inability to meet proposed outcomes.	Annually	Ongoing	On Track
	Proactively follow up with leads from implementers and foster relationships, promoting feedback and flexibility in response.	Ongoing	Ongoing	On Track
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.	Complete implementer onboarding by end of 2024 and ensure there are clear roles and responsibilities for all involved.	Q4 2024		Complete
	Establish Community Roundtable and engagement process by the end of 2024.	Summer 2024		Complete
	Define and meet milestones, timeframes, and goals of each program action item to ensure early wins.	Monthly Metrics, Q1 Reporting	Ongoing	On Track
	Establish effective communication channels and protocols with CPUC and other key actors.	Monthly Meetings; CAEECC, etc.	Ongoing	On Track
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)	Determine appropriate metrics to reach outcomes identified in the business plan based on current CPUC regulations.	Report in April 2024	Ongoing	On Track
	Develop consistent reports and metrics based on available program data and QA/QC results to ensure accuracy.	Annually March	Ongoing	On Track
	Align the expectations and interests of COGs with program implementers work plans.	Ongoing	Ongoing	On Track
	Maintain consistent communication with consultant team and implementers, including weekly meetings, as needed, to ensure accountability and coordination of scheduling	Ongoing	Ongoing	On Track

	Establish regular check in and progress meetings and conduct routine contract performance review.	Ongoing	Ongoing	On Track
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Goal 3

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

Desired Outcome

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

Strategic Objective	Strategies	Timeline	Frequency	Status
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.	Develop Education and Outreach Plan (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.	Q1 2024	Ongoing	On Track
	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).	Q2 2023		Complete
	Actively engage and identify member pain points and concerns when developing a program.	Ongoing	Ongoing	On Track
	Develop a feedback loop for energy efficiency topics and issues in the region, helping solve problems directly and collaboratively.	24 months		Complete
	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.	Q3 2023	Ongoing	On Track
	Ensure accessibility through translating material in multiple languages and providing appropriate accommodations to engage as many people as possible.	Ongoing		Complete
	Conduct an annual/periodic program focused survey(s) to measure awareness and needs. (Connected to S4.3.4)	Q1 Bi-annually	Ongoing	On Track
	3.2 Identify and collaborate with community champions and thought leaders to be the voice of the program empowering the community through establishing and	Establish program specific Community Roundtables in accordance with the Memorandum of Agreement.	Q4 2024	Ongoing
Determine a process for Community Roundtables to inform program design at launch and over time.		Q4 2024		Complete

managing Community Roundtables.	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.	Q3 2024		Not Started
	Update participants, roles, and responsibilities of the Community Roundtables over time to reflect priorities and needs.	Annually	Ongoing	On Track
3.3 Utilize dedicated staff and resources to develop and maintain relationships and partnerships with members, potential partners, and other stakeholders throughout the region.	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.	June 2025		Complete
	Develop and maintain contact relationship management (CRM) system to map and identify partners and track by program and region.	2023		Complete
	Identify staff members to steward partnership development with support from all I-REN staff and the Executive Committee as appropriate.	Q4 2024	Ongoing	On Track
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.	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.	Ongoing	Ongoing	On Track
	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.	Ongoing	Ongoing	On Track
	Research the landscape to determine the connections and ensure staff training on upcoming legislative matters is up to date.	Ongoing	Ongoing	On Track
	Utilize Civic Well for regional messaging about state activities to ensure state people are at the table.	Ongoing	Ongoing	On Track
	Maintain membership and actively participate in CCEC, LGSEC, and CAEECC.	Annually	Ongoing	On Track
	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.	Ongoing	Ongoing	On Track

Goal 4

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

Desired Outcome

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

Strategic Objective	Strategies	Timeline	Frequency	Status
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.	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.	2023		Complete
	Provide resources to increase staff knowledge about the program topics and keep up to date through internal training on equity and DEI.	Ongoing	Ongoing	On Track
	Identify clear roles, and responsibilities while building the team through organizational meetings, effective onboarding, training, hiring and maintaining staff capacity.	Ongoing	Ongoing	On Track
4.2 Build capacity and ability to ensure that regulatory requirements are met and become standards of operations.	Train and support staff in learning and building capacity to work with regulators.	Ongoing	Ongoing	On Track
	Engage with other RENs and CALREN to understand key issues and to build capacity and strength in the RENs position.	Ongoing	Ongoing	On Track
	Create templates and resources to make responses consistent and simpler.	As needed	Ongoing	On Track
	Routinely subscribe, follow, and read information from CPUC, CEC, and CAEECC.	Ongoing	Ongoing	On Track
4.3 Annually review organizational performance and provide a routine means to make changes and updates to systems, processes, and overall operations as needed.	Develop and manage internal organization budget.	May-June Annually	Ongoing	On Track
	Maintain and update the strategic plan annually.	January Annually	Ongoing	On Track
	Engage with internal stakeholders to understand areas for improvements and changes.	Ongoing	Ongoing	On Track
	Conduct an annual member survey to measure effectiveness with member agencies. (Connected 3.1.6)	Bi-Annually	Ongoing	On Track