



Inland Regional Energy Network I-REN Executive Committee

AGENDA

Tuesday, April 18, 2023
2:00 PM

San Bernardino Council of Governments
1170 West Third Street, 1st Floor Board Room
San Bernardino, CA 92410

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

Remote Meeting Locations

WRCOG
3390 University Avenue, Suite 200
Riverside, CA 92501

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

Public Zoom Link

Meeting ID: 851 6961 6070
Passcode: 585829
Dial in: (669) 900 9128 U.S.

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

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

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

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

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

1. CALL TO ORDER (Crystal Ruiz, Chair)

2. PLEDGE OF ALLEGIANCE

3. ROLL CALL

4. PUBLIC COMMENTS

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

5. CONSENT CALENDAR

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

A. Summary Minutes from the March 21, 2023, Executive Committee Meeting

Requested Action(s): 1. Approve the Summary Minutes from the March 21, 2023, Executive Committee meeting.

B. I-REN Regulatory and Reporting Update

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

6. REPORTS / DISCUSSION

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

A. Approval of Fiscal Year 2023/2024 Agency Budget

Requested Action(s): 1. Approve the proposed Fiscal Year 2023/2024 Agency budget.

B. Public Sector Program Updates

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

C. I-REN Orientation Meeting(s) Update

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

D. Equitable Distribution of I-REN Program Resources

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

7. REPORT FROM THE EXECUTIVE COMMITTEE CHAIR

Crystal Ruiz, WRCOG

8. ITEMS FOR FUTURE AGENDAS

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

9. GENERAL ANNOUNCEMENTS

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

10. NEXT MEETING

The next I-REN Executive Committee meeting is scheduled for Tuesday, May 16, 2023, at 2:00 p.m., location to be determined.

11. ADJOURNMENT

12. AGENCY ACRONYMS

Inland Regional Energy Network Acronym Guide

3C-REN – Tri-County Regional Energy Network (Counties of Ventura, Santa Barbara, and San Luis Obispo)

ABAL – Annual Budget Advice Letter

AHJ – Authority Having Jurisdiction

AVCE – Apple Valley Choice Energy

BayREN – Bay Area Regional Energy Network (nine county REN in Northern California)

BUC – Building Upgrade Concierge

C&S – Codes & Standards

CAEECC – California Energy Efficiency Coordinating Committee

CalChoice – California Choice Energy Authority

Cal ISO – California Independent System Operator

CARB – California Air Resources Board

CCA – Community Choice Aggregator

CCEC – California Climate & Energy Collaborative

CEC – California Energy Commission

COG - Council of Government

CPA – Clean Power Alliance

CPUC – California Public Utilities Commission

CVAG – Coachella Valley Association of Governments

DAC – Disadvantaged Communities

DACAG – Disadvantaged Communities Advisory Group

DCE – Desert Community Energy

DER – Distributed Energy Resources

DOE – U.S Department of Energy

EE – Energy Efficiency

EM&V – Evaluation, Measurement, and Verification
EV – Electric Vehicle
GHG – Greenhouse gas
HTR – Hard To Reach communities
IID – Imperial Irrigation District
IOU – Investor-Owned Utility
I-REN – Inland Regional Energy Network
JCM – Joint Cooperation Memorandum
LGSEC – Local Government Sustainable Energy Coalition
LGP – Local Government Partnership
MOA – Memorandum of Agreement
NEBs – Non-energy Benefits
NMEC – Normalized Metered Energy Consumption
NREL – U.S Department of Energy National Renewable Energy Laboratory
PG&E – Pacific Gas & Electric
PA – Program Administrator
POU – Publicly Owned Utility
REN – Regional Energy Network
RMEA – Rancho Mirage Energy Authority
RPU – Riverside Public Utilities
SBCOG – San Bernardino Council of Governments
SCE – Southern California Edison
SCG / SoCalGas – Southern California Gas Company
SDG&E – San Diego Gas & Electric
SJP – San Jacinto Power
SoCalREN – Southern California Regional Energy Network (all of southern California, administered by Los Angeles County)
TA – Technical Assistance
TOU – Time of use
TRC – Total Resources Cost
V2G – Vehicle to Grid
WE&T – Workforce Education & Training
WRCOG – Western Riverside Council of Governments

I-REN Executive Committee

Minutes

1. CALL TO ORDER

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

2. PLEDGE OF ALLEGIANCE

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

3. ROLL CALL

- CVAG:
 - City of Indio - Oscar Ortiz
- SBCOG:
 - County of San Bernardino - Curt Hagman
 - Town of Apple Valley - Art Bishop
- WRCOG:
 - City of Corona - Jacque Casillas*
 - City of Jurupa Valley - Chris Barajas
 - 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: Hagman

SECONDER: Barajas

AYES: Ortiz, Hagman, Bishop, Barajas, Ruiz

A. Summary Minutes from the February 21, 2023, Executive Committee Meeting

Action:

1. Approved the Summary Minutes from the February 21, 2023, Executive Committee meeting.

6. REPORTS / DISCUSSION

A. I-REN Strategic Planning Update and Survey Results

Mindy Craig from Bluepoint Planning shared a presentation about the I-REN Strategic Plan and provided a timeline for the process of creating and implementing the Plan, which is expected to be completed by July 2023.

Bluepoint has created a strategic framework in the Business Plan, which is very specific to the California Public Utilities Commission (CPUC) and its funding. I-REN's vision is to connect residents, business, and local governments to a wide range of energy efficiency resources within the Riverside and San Bernardino Counties. Most of the effort is in the development of regional programs and technical assistance that will engage everyone in the entire region.

As a REN, I-REN will provide energy efficiency services, which is the key for a long-term resilient community by driving down demand for energy. Most program areas are divided equally and accessible to both counties, except the Normalized Energy Metered Consumption (NMEC) rebate programs, which will focus on reducing energy use with equipment upgrades on public buildings and be dependent on participation. A substantial amount of funding will be equally divided within the COGs to implement and deliver these programs for the next six years.

BayREN counties' primary role is to conduct marketing and outreach, and programs are run by third-party implementers or by a county which wants to lead it.

Committee member Curt Hagman pointed out that the Committee had previously asked to share the resources equally for each county, but now Bluepoint is recommending that programs are accessible to all, not specific to any area, and asked why this changed from previous discussions.

Ms. Craig explained that most of the funding for those programs are for the technical support, workforce and education, and marketing and outreach. The programs are not specific to one city, but are available for all cities to participate in if they choose to do so. The funds are equally available to any city that wants to participate.

Mr. Hagman is concerned that SBCOG will not get its fair share of resources because there are two COGs for Riverside, and only one for San Bernardino, which is the reason that SBCOG left the Los Angeles REN. I-REN is setting it up to be the same way by dividing resources equally by COG, with twice the resources going to Riverside County jurisdictions. There are also no guidelines for the projects.

Committee member Art Bishop stated that SBCOG had more than one-third of expenditure dollars, since it has a larger geographical area, population, and number of cities. Mr. Bishop is concerned that when the time comes to ask for additional funding to meet the needs of SBCOG, those dollars may not be available.

Committee member Hagman added that if boundaries are set semi-equally and work within those parameters, I-REN can avoid any potential downfalls later. Committee member Hagman does not want to compete against each other or have project money up for grabs.

Chair Ruiz asked if the two COGs in Riverside County are representing different people, or if there is

duplication.

Casey Dailey, WRCOG Director of Energy & Environment Programs, clarified that there is no duplication, but there are different member agencies within the COGs. It is not necessarily about representing, but rather about engaging the member cities, counties, and individuals that are involved in facilities. The programs will be designed, with the Committee's direction, to equally serve everybody without prejudice of jurisdiction.

Mr. Dailey added that in the summer of 2023, the I-REN team will conduct I-REN orientations in the smaller, far-outreaching communities of the two counties, such as the High Desert area, to provide information about available I-REN programs, resources, and services. The team would engage individuals from those jurisdiction for their input and establish a relationship with them to see how I-REN can support them.

Chair Ruiz suggested that instead waiting for cities to apply for projects / programs themselves, the I-REN team could actively educate and encourage the cities to apply.

Committee member Jacque Casillas asked if the I-REN Executive Committee approves the programming, or if the consultants will approve.

Mr. Dailey responded that last month, the Committee awarded four contracts to companies and firms that will implement the programs. Next month, one of those firms will present the Public Sector Programs that are intended to be offered.

Committee member Casillas suggested having a two-step award process to accommodate San Bernardino County: first by population, and if there is still money left over, then everyone can apply.

Mr. Dailey responded that there is an entire section in the I-REN Business Plan which talks about goals and how to ensure that all 52 cities in the two counties are served equally. Out of the Normalized Meter Energy Consumption (NMEC) Program, there is a defined dollar amount, and there is nothing preventing the Committee from allocating a certain amount to each county.

Committee member Casillas asked if they could do the same for each program area.

Ms. Craig responded that each one is slightly different, but Bluepoint can create a framework to ensure equity across the region, especially when looking at targeted partners. There will be built-in mechanisms where the Committee can re-visit to continue to build and improve the programs and offerings in a way to best serve the COGs.

Chair Ruiz indicated that the Committee would divide the funds on a program-by-program basis, and consultants and staff should present a plan that is 50/50 between the two counties, when applicable.

Mr. Dailey stated that the funding would also depend on the demand, and used the Fellowship Program as an example. The budget is structured to allow for 27 fellows to be placed within the 54 cities each year; however, funding will only be allocated to those cities that request and host a fellow.

Committee member Hagman agreed that if cities do not participate, then they should not be rewarded,

and if the COG does not spend their share of the funds, then those funds should go back in the bucket.

Ms. Craig suggested that the Strategic Plan becomes the mechanism to help mitigate any disagreements.

Margaret Marchant from Bluepoint reported that the most important lesson to take from other RENs is to learn from their audience and listen to their input. Partnering with other programs can help reach audiences and benefit from shared objectives and activities.

Nancy Barba from Bluepoint emphasized that data collection is important to ensure that I-REN is serving its target communities, and share that data with evaluators. Sensitive data such as income and demographic data will serve to inform if the benefits and programs are accruing to the target communities. There are tools available, such as the CalEnviroScreen, to leverage to inform and target program participation.

Committee member Bishop asked if there is any intention to use I-REN funds to send representatives to participate in code hearings, and speak on / for against policies on behalf of the I-REN.

Mr. Dailey responded that the CPUC has regular proceedings, which I-REN can be a party to, and provide comments and rebuttals from the I-REN perspective. From a legislative standpoint, the use rate-payer dollars is out of the scope of those funds.

Ms. Craig added that BayREN and 3CREN have participated with local utilities on their state-wide Codes and Standards Programs. BayREN also worked with the University of California, Los Angeles to develop a data tool to understand where the energy usage is. Marketing and branding is a critical piece to raise awareness and raise I-REN's profile. It takes time and consistency, so that even if someone is not familiar with it, a consistent message still gets across the different platforms.

Ms. Marchant indicated that the best practices for building an I-REN budget involves building the budget from the bottom up, which is how I-REN's budget was set up. The CPUC will measure the success based on outcomes at the regional level, without regard to COG territories or county lines. It takes the entire combined region that the REN serves, but RENs can set their own targets and metrics to track their performance in addition to CPUC methods to ensure the REN reaches their region equally.

Ms. Barba indicated that one of the components of a successful REN is the ability to be flexible and adaptable. I-REN will be the first REN that has elected officials in the decision making process, and there will be other levels of operationalized decision making by staff and implementers. Evaluators will require certain data to be reported yearly to ensure that I-REN is working towards its Business Plan goals.

Ms. Craig discussed the stakeholder survey results, which focused on awareness and outreach, making the resources available to the region, and ways to make I-REN a success. Discussions also included strengths and weaknesses of I-REN, as well as opportunities to consider, and potential threats.

Goal areas include providing equitable distribution of benefits in the region, building accountability and transparency to demonstrate success, enabling a successful REN launch, and ensure an effective organization that optimizes relationships with members and partners.

Committee member Bishop indicated that in addition to the tribes and special districts, San Bernardino County also has Community Service Districts that he would like Bluepoint to add to the list of local governments.

Action:

1. Received and filed.

B. Workforce, Education & Training Sector Update: I-REN Energy Fellowship Program

Tyler Masters, WRCOG Program Manager, reported that last month the I-REN Executive Committee directed staff to continue working with CivicSpark to see what the program would look like. I-REN's application was approved in early March 2023, and after direction from the Committee, staff will develop a list of energy programs to choose from and begin having conversations member agencies. After confirming host agency participation, recruitment would begin in May 2023 to give host agencies ample opportunity to interview potential Fellows, and the Fellowship Program is set to officially begin in September 2023.

Community colleges have been informed of this opportunity, and staff met with the President and Dean of Barstow Community College.

Committee member Art Bishop suggested that staff reach out to the high schools, as this would carry through to the community colleges.

Mr. Masters explained that host agencies would be required to provide a location for fellows to work, provide the necessary equipment, and have a site supervisor committed to the Fellow's professional growth. Mr. Masters provided three options to consider on how to split the Fellows within the I-REN territory: 1) first come, first served 2) allocation by county, and 3) allocation by COG.

Action:

1. Authorized the WRCOG Executive Director, upon review by WRCOG legal counsel, to enter into an Agreement with CivicSpark to support the I-REN Energy Fellowship and to identify, recruit, and place up to 27 Fellows within the I-REN service territory in the fall of 2023.

RESULTS: APPROVED AS RECOMMENDED

MOVER: Hagman

SECONDER: Bishop

AYES: Ortiz, Hagman, Bishop, Casillas, Barajas, Ruiz

C. I-REN Regulatory and Reporting Update

Due to time constraints, there was no presentation on this item, but Committee members voted on this item.

Action:

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

RESULTS: APPROVED AS RECOMMENDED
MOVER: Hagman
SECONDER: Barajas
AYES: Ortiz, Hagman, Bishop, Casillas, Barajas, Ruiz

D. I-REN Participation in U.S. Department of Energy Resilient and Efficient Codes

Due to time constraints, there was no presentation on this item, but Committee members voted on this item.

Actions:

1. Approved I-REN's participation as subrecipient in the California Energy Commission application to the U.S. Department of Energy for funding of SolarAPP+ and CodeCycle projects under the Resilient and Efficient Codes Implementation Program.
2. Authorized the WRCOG Executive Director to sign Partner Commitment Letters to the California Energy Commission and other ancillary documents in connection with the application to Department of Energy.

RESULTS: APPROVED AS RECOMMENDED
MOVER: Hagman
SECONDER: Barajas
AYES: Ortiz, Hagman, Bishop, Casillas, Barajas, Ruiz

E. Discussion of I-REN Executive Committee 2023 Meeting Location Schedule

Casey Dailey, WRCOG Director of Energy & Environment Programs, reported that AB 361 rules are no longer in effect, so the Committee will revert to either the old rules (the Brown Act) or AB 2449. Going forward, the Committee must choose where the next meeting locations will be.

Committee member Curt Hagman suggested that Committee members could rotate between both COGs.

Mr. Dailey added that Committee members will be given a mileage reimbursements, and parking will be validated.

Staff will ensure that a location is available in WRCOG's office. If a Committee member would like to attend remotely, WRCOG must be notified at least 10 days prior to the meeting date so that the remote location can be added to the agenda, pursuant to Brown Act Rules. A meeting location schedule is yet to be determined.

Action:

1. Received and filed.

7. REPORT FROM THE EXECUTIVE COMMITTEE CHAIR

Chair Ruiz pointed out the pamphlets in the WRCOG lobby and encouraged members to take one.

8. ITEMS FOR FUTURE AGENDAS

Committee member Art Bishop requested an agenda item for clarification regarding the distribution of funds within I-REN. It was agreed that it would be explained through the Strategic Plan process in the upcoming months.

Committee member Bishop also indicated that there is a concern for increasing natural gas prices, which is a big issue in his area.

Mr. Dailey said he would do some research and provide some information.

9. GENERAL ANNOUNCEMENTS

There were no general announcements.

10. NEXT MEETING

The next I-REN Executive Committee meeting is scheduled for April 18, 2023, at a location yet to be determined.

11. ADJOURNMENT

The meeting was adjourned at 3:35 p.m.



Inland Regional Energy Network I-REN Executive Committee

Staff Report

Subject: I-REN Regulatory and Reporting Update
Contact: David Freedman, CVAG Energy & Sustainability Program Manager,
dfreedman@cvag.org, (760) 346-1127
Date: April 18, 2023

Requested Action(s):

1. Receive and file.

Purpose:

The purpose of this item is to provide an update on I-REN's regulatory and reporting activities.

Background:

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

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

Prior Action(s):

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

Fiscal Impact:

All costs associated with the development of an I-REN Energy-Efficiency Program are included in WRCOG's adopted Fiscal Year 2022/2023 Agency Budget under the Energy & Environmental Department.

Attachment(s):

Attachment 1 - I-REN Regulatory Proceedings Overview

Attachment 2 - I-REN Required CPUC Reporting

Attachment 1

I-REN Regulatory Proceedings Overview

I-REN Regulatory Proceedings Overview

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

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

1. Proceeding Overview

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

2. Key I-REN Issues

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

3. Key Decisions

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

energy efficiency program administrators to use unspent and uncommitted energy efficiency funds up to \$185,000 to fund a compensation pilot recommended in the Final Report of the CAEECC Compensation Task Force.

4. Status Update

No update.

5. Upcoming Filings / Decisions / Meetings

None pending.

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

1. Proceeding Overview

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

2. Key I-REN Issues

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

3. Key Decisions

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

- [Proposed Decision](#) (March 3, 2003) – Addresses a CPUC staff proposal for reducing ratepayer-funded incentives for natural gas EE measures. This Decision also provides guidance for Codes and Standards subprograms and budgets. It has near-term implications for I-REN regarding required participation in a stakeholder process to develop a technical guidance document, plus required additions to 2028 portfolio filings to be submitted in 2026, and potentially other reporting implications. I-REN did not file comments on the Proposed Decision. The CPUC adopted the Proposed Decision at its April 6 Voting Meeting.

4. Status Update

- October and November 2022 – The applicants and intervenors (including the CPUC Public Advocates Office) submitted testimony.
- December 1, 2022: Meet and confer with applicants to discuss remaining issues to be addressed: 1) setting baselines for equity metrics; and 2) program precedence.

5. Upcoming Filings / Decisions / Meetings

- April 3, 2023 – Final comments on REN Business Plan Applications.
- April 10, 2023 – Reply comments on REN Business Plan Applications.
- Q2 - Q3 2023 – Proposed Decision and CPUC Decision on REN Business Plan Applications.

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

1. Proceeding Overview

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

2. Key I-REN Issues

- Whether to adopt the Societal Cost Test (SCT) and submitting input on the questions outlined in the Administrative Law Judge ruling issued on February 13, 2023, referred to below.
- Continuing to improve the DER cost-effectiveness process.
- Taking part in the Data Working Group activities as described in Track 2 of this proceeding, including recommending goals and objectives for expanded use of available data; developing recommendations regarding data sharing, access, and use; developing recommendations regarding data collection and reporting tools; and developing recommendations for data collection in support of equity programs.

3. Key Decisions

- [Order Instituting Rulemaking](#) (November 23, 2022) – Sets forth the issues, need for hearing, schedule, category, and other matters necessary to scope this proceeding.
- [Administrative Law Judge’s Ruling](#) (February 13, 2023) – By this ruling, the CPUC is seeking comments from parties on whether the CPUC should use an SCT or apply recent air quality research results when evaluating the cost effectiveness of DER.

4. Status Update

- January 9, 2023 – Comments on the Order were filed by the parties, including BayREN, 3CREN and various CCAs.
- February 16, 2023 – WRCOG on behalf of I-REN filed a Motion for Party Status.
- March 14, 2023 – WRCOG motion is granted.

5. Upcoming Filings / Decisions / Meetings

- March 29, 2023 – Pre-hearing Conference. WRCOG on behalf of I-REN participated and gave the following testimony:
 - I-REN agrees that equity should be scoped broadly and considered across all phases and tracks.
 - Regarding Phase 1 Track 1 of the preliminarily scoping memo, I-REN is generally supportive of exploring the SCT at least on an informational basis as a possible way to better quantify and implement non-energy benefits.
 - Of particular importance to I-REN are non-energy benefits such as family health and safety and comfort given the disproportionate impacts of climate change on I-REN territory.
 - I-REN is reviewing the staff report and preparing to respond to the ALJ ruling next month with additional thoughts and comments on this topic.
- April 28, 2023 – Response to the ALJ Ruling.
- Approximately 45 days after pre-hearing conference – Scoping Memo.

II. Proceedings That I-REN Is Monitoring

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

1. Proceeding Overview

On January 31, 2019, pursuant to SB 1477, the CPUC initiated this rulemaking to support the decarbonization of buildings in California. The proceeding is designed to be inclusive of any alternatives that could lead to the reduction of greenhouse gas emissions associated with energy use in buildings [related]... to the State’s goals of reducing economy-wide GHG

emissions 40% below 1990 levels by 2030 and achieving carbon neutrality by 2045 or sooner.

2. Key I-REN Issues

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

3. Key Decisions

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

4. Status Update

[D.23-02-030](#) (February 23, 2023) – Extends the statutory deadline in this proceeding until January 31, 2024.

5. Upcoming Filings / Decisions / Meetings

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

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

1. Proceeding Overview

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

2. Key I-REN Issues

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

3. Key Decisions

- [D. 22-04-036](#) (April 7, 2022) – Adopts final budgets, incentive levels and other program requirements for the SGIP HPWH program, including training, inspection, and workforce development requirements.
- [Assigned Commissioner's Ruling](#) (October 26, 2022) – Seeks comments from parties on issues related to improving outcomes for low-income customers under the SGIP and a variety of implementation issues related to the funding authorized by Assembly Bill 209.

4. Status Update

Parties were directed to file opening comments on the questions contained in the Assigned Commissioner's Ruling no later than December 2, 2022, and reply comments no later than December 16, 2022.

5. Upcoming Filings / Decisions / Meetings

None pending.

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

1. Proceeding Overview

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

2. Key I-REN Issues

- Energy Code enforcement has historically been difficult for local jurisdictions, particularly smaller communities with fewer resources.
- Track and provide information on California Energy Code.

- Perform updates to training curriculums to reflect adopted changes to California Energy Code.

3. Key Decisions

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

4. Status Update

January – March 2023: Utility-sponsored stakeholder meetings.

5. Upcoming Filings / Decisions / Meetings

- July 2023: Codes and Standards Enhancement (CASE) Reports to CEC.
- May – August 2023: CEC pre-rulemaking workshops.
- October 2023 – January 2024: File and open rulemaking.
- January – June 2024: CEC rulemaking.
- June 2024: 2025 Energy Code adopted.
- January 1, 2026: 2025 Energy Code goes into effect.

Attachment 2

I-REN Required CPUC Reporting

I-REN Required CPUC Reporting for March 2023 – March 2024

Report Type	Due Date	Content	Status
Monthly Report	Due 30 days after last day of month	Current month's expenditures, plus YTD Expenditures, Committed Funds, Gross and Net Savings for all Programs in the Portfolio.	To begin after SoCalGas invoicing.
2022 Q4 Claims	3/1/2023	Program expenditures and committed funds (YTD) PLUS Project level savings, measures, participant costs, incentives, etc., being claimed in Q4.	Not required, as I-REN invoice to SoCalGas is forthcoming as of due date.
2022 Annual Monthly Report	5/14/2023	"Month 13" report to align savings and expenditures with annual claim true up and annual report.	Initial preparation underway. Deadline extended for all PAs in ALJ Email Ruling 3/28/23.
2022 Annual Report	5/14/2023	Narrative and spreadsheet format report on overall Portfolio performance and Program level accomplishments.	Currently in development. Deadline extended for all PAs in ALJ Email Ruling 3/28/23.
2023 JCM	TBD: 90 days after decision in A.22-02-005	Narrative describing coordination with other PAs in I-REN territory.	Initial coordination meetings held. Extension granted to all PAs to submit JCMs 90 days following forthcoming decision in A.22-02-005.
2022 Annual Claims True up	4/14/2023	Yearly report which sums up all Quarterly reports; opportunity for PAs to true up/reconcile any errors in reporting from previous quarters and/or monthly reports.	
2023 Q1 Claims	6/1/2023	Program expenditures and committed funds (YTD) PLUS Project level savings, measures, participant costs, incentives, etc., being claimed in Q1.	
2024-2031 Business Plan True Up Advice Letter	~9/1/2023	True up of 2024-2031 Business Plan forecasting.	No specific due date or guidance has been issued by CPUC as of 12/31/2022. FE will coordinate with PLs to make any forecasting adjustments.

Report Type	Due Date	Content	Status
2023 Q2 Claims	9/1/2023	Program expenditures and committed funds (YTD) PLUS Project level savings, measures, participant costs, incentives, etc., being claimed in Q2.	
2023 Q3 Claims	12/1/2023	Program expenditures and committed funds (YTD) PLUS Project level savings, measures, participant costs, incentives, etc., being claimed in Q3.	
2023 Q4 Claims	3/1/2024	Program expenditures and committed funds (YTD) PLUS Project level savings, measures, participant costs, incentives, etc., being claimed in Q4.	
<p>Abbreviations: ALJ = Administrative Law Judge; Q = quarter of the year; CEDARS = California Energy Data and Reporting System; YTD = year to date; SFTP = Secure File Transfer Protocol; PII = personally identifiable information; PL = program lead; PA = program administrator; FE: Frontier Energy</p>			



Western Riverside Council of Governments I-REN Executive Committee

Staff Report

Subject: Approval of Fiscal Year 2023/2024 Agency Budget
Contact: Casey Dailey, WRCOG Director of Energy & Environmental Programs,
cdailey@wrcog.us, (951) 405-6720
Date: April 18, 2023

Requested Action(s):

1. Approve the proposed Fiscal Year 2023/2024 Agency budget.

Purpose:

The purpose of this item is to review and approve the Fiscal Year 2023/2024 Agency budget.

WRCOG 2022-2027 Strategic Plan Goal:

Goal #6 - Develop and implement programs that support resiliency for the subregion.

Background:

Initiated in 2019, the Inland Regional Energy Network (I-REN) is a consortium of the Western Riverside Council of Governments, the Coachella Valley Association of Governments, and the San Bernardino Council of Governments (I-REN COG partners) that serve the Counties of Riverside and San Bernardino in the implementation of energy efficiency programs and services to support member agencies and the public. These partners joined together and submitted a Business Plan to the California Public Utilities Commission (CPUC) in order to establish locally administered, designed, and delivered energy efficiency programs. I-REN's Business Plan was approved by the California Public Utilities Commission (CPUC) in 2021 for three sectors: Public, Codes and Standards, and Workforce Education and Training.

The CPUC-approved I-REN Business Plan establishes the 6-year budgeting parameters of I-REN in terms of the revenue amount and spending categories that can be authorized. For the purposes of annual budgeting, the spending categories remain consistent throughout the 6-year authorization period and the spending amounts fluctuate. As funds from the 6-year authorization (\$65.6m) are drawn down, the remaining funds are spread evenly over the remaining time. Lower spending levels in year one are offset by proportionally higher spending levels in future years. While the pace of spending fluctuates slightly from year to year, the cumulative spending total over the 6-year period is capped at \$65.6m.

The annual spending amount is the result of that calculation and is codified through a procedural step with the CPUC (annual Advice Letter) as well as the WRCOG annual budget in which the I-REN funds are embedded because WRCOG serves as the Lead Administrative Agency for I-REN. The asymmetry between the calendar year budgeting of the CPUC and the fiscal year budgeting of the host budget (WRCOG) is reconciled through a series of delegated authority provisions allowing for the alignment of

the two budgeting periods.

The 23/24 IREN budget is segregated into three components, based on the approved sectors in the Business Plan: Public, Workforce, Education & Training and Codes & Standards. The proposed budget is based on the CPUC approved budgets for calendar years 2023 and 2024 and includes a total of \$10,478,589 in available revenues and \$9,934,767 in proposed expenditures. Because this budget represents only a portion of the 6-year authorization period, carryover funds are anticipated to be addressed through the annual reporting process so that unused funds from one year are carried over and not forfeited.

Several funding items appear separately in more than one sector in order to reflect the costs associated with a particular function and provide greater transparency about the staffing activities of I-REN. For example, the cumulative total for non-overhead staffing between the three COGs is \$2.25m.

This number is divided equally between CVAG, SBCOG, and WRCOG for a total of \$750k each. That number is further divided among the sectors. WRCOG, for example, includes \$500,000 in Public Sector, \$125,000 in the Workforce, Education & Training sector, and \$125,000 in the Codes and Standards sector, for a combined total of \$750k.

Total Revenue	\$6,450,125
Proposed Expenses:	
The Energy Coalition	\$2,500,000
Normalized Metered Energy Consumption (NMEC) Incentives	\$1,625,000
Alternative Energy Systems Consulting, Inc. (AESC) - BUC Software	\$218,333
ICF Resources (Marketing & Outreach)	\$83,333
Frontier Energy (I-REN Implementation contract)	\$83,333
CivicPlus (Website Development)	\$20,501
Legal Counsel	\$20,000
COG Educational & Outreach Sponsorships	\$25,000
CVAG Staffing Reimbursement	\$500,000
SBCOG Staffing Reimbursement	\$500,000
WRCOG Staffing Reimbursement	\$500,000
WRCOG Overhead	\$190,025
Miscellaneous Expenses (supplies & materials, computer equipment, travel, conferences, mileage reimbursements, etc.)	\$184,600
Total Expenses:	\$6,450,125
Unallocated	\$0

Workforce, Education & Training (WE&T) revenues are \$2,454,864 and proposed expenditures are \$1,986,242. These expenditures consist of the below authorized contracts, staffing costs, overhead and other miscellaneous expenses. The unallocated funding is anticipated to be utilized to support new initiatives related to the WE&T Sector following direction from the Executive Committee. A decision does not need to be made at this time to allocate the funding and staff will return at a later date to discuss and receive direction.

Total Revenue	\$2,454,864
Proposed Expenses:	
CivicSpark (I-REN Energy Fellowship Program)	\$837,000
CCEC and Annual Memberships	\$302,000
Energy Certification Program	\$70,000
Webinars/Virtual Certifications	\$60,000
ICF Resources (Marketing & Outreach)	\$83,333
Frontier Energy (existing contract)	\$83,333
CivicPlus (Website Development)	\$20,501
Legal Counsel	\$20,000
COG Educational & Outreach Sponsorships	\$25,000
CVAG Staffing Reimbursement	\$125,000
SBCOG Staffing Reimbursement	\$125,000
WRCOG Staffing Reimbursement	\$125,000
WRCOG Overhead	\$110,075
Total Expenses	\$1,986,242
Unallocated	\$468,622

Codes & Standards revenues are \$1,573,600 and proposed expenses are \$1,498,400. These expenditures consist of the following authorized contracts, staffing costs, overhead and other miscellaneous expenses.

Total Revenue	\$1,573,600
Proposed Expenses:	
Frontier Energy	\$791,333
ICF Resources (Marketing & Outreach)	\$83,333
Frontier Energy (existing contract)	\$83,333
CivicPlus (Website Development)	\$20,501
BB&K (Legal Counsel)	\$20,000
COG Sponsorships	\$25,000
CVAG Staffing Reimbursement	\$125,000
SBCOG Staffing Reimbursement	\$125,000
WRCOG Staffing Reimbursement	\$125,000
WRCOG Overhead	\$99,900
Total Expenses	\$1,498,400
Unallocated	\$75,200

As the Administrative Lead agency, the I-REN budget 'lives' in the overall WRCOG budget and staff will be presenting the FY 2023/2024 budget to the WRCOG Executive Committee at its May 1, 2023,

meeting. The WRCOG Executive Committee will only authorize the maximum revenue and expenditure levels, leaving the line item details to the I-REN Executive Committee.

The budget is presented for the consideration and approval of the I-REN Executive Committee.

Prior Action(s):

None.

Fiscal Impact:

Approval of the I-REN budget will authorize the proposed expenditures for Fiscal Year 2023/2024.

Attachment(s):

None.



Inland Regional Energy Network I-REN Executive Committee

Staff Report

Subject: Public Sector Program Updates
Contact: Benjamin Druyon, WRCOG Program Manager, bdruyon@wrcog.us, (951) 405-6727
Date: April 18, 2023

Requested Action(s):

1. Receive and file.

Purpose:

The purpose of this item is to provide updates on the I-REN Public Sector programs and activities.

Background:

Initiated in 2019, the Inland Regional Energy Network (I-REN) is a consortium of the Western Riverside Council of Governments, the Coachella Valley Association of Governments, and the San Bernardino Council of Governments (I-REN COG partners) that serve the Counties of Riverside and San Bernardino in the implementation of energy efficiency programs and services to support member agencies and the public. These partners joined together and submitted a Business Plan to the California Public Utilities Commission (CPUC) in order to establish locally administered, designed, and delivered energy efficiency programs. I-REN's Business Plan was approved by the California Public Utilities Commission (CPUC) in 2021 for three sectors: Public, Codes and Standards, and Workforce Education & Training.

I-REN's Public Sector Program objectives are to 1) ensure local governments have the support and resources to develop and implement their strategic energy plans and energy efficiency projects, and 2) help local governments afford and finance a range of energy efficiency upgrades through innovative financing options. Following a competitive bidding process for I-REN's Public Sector, The Energy Coalition (TEC) was selected to develop and implement the following scopes:

1. Public Sector Technical Assistance (TA) and Strategic Energy Planning Program Implementation.
2. Public Buildings Normalized Metered Energy Consumption (NMEC) Incentive Program Implementation.
3. Public Sector Financing Services.

For each of the three scopes, TEC will provide leadership for program design activities in collaboration with the I-REN team, coordinate outreach and engagement activities, be responsible for program implementation, and provide other services as needed.

The Scope of Work for these Public Sector programs are listed below.

Scope 1: Public Sector Technical Assistance and Strategic Energy Planning Program Implementation

Task 1.1: Program Design

The consultant will provide leadership for program design activities in collaboration with the I-REN team. The Program's design must be aligned with the I-REN Business Plan and all other applicable requirements for REN energy efficiency programs. The consultant will be responsible for each activity listed below:

- Develop a concierge-style program delivery model that supports I-REN's goals for the TA Program, overcomes public sector participation barriers, and prioritizes service to vulnerable communities.
- Support I-REN in engaging with local and regional stakeholders to ensure the program design fits the needs of local governments in the region.
- Define program eligibility guidelines and program team roles; document program processes and procedures, and develop participant forms and other collateral.
- Establish coordination process with other I-REN energy efficiency programs, staff, Energy-Efficiency Fellows, services, and implementers, e.g., the Public Buildings NMEC Program and Public Sector Financing Services included in this SOW, to maximize program participation and benefits to customers.
- Identify other public sector energy efficiency programs and related offerings in the region and establish a coordination process with program administrators to identify eligibility requirements and participation processes, and to inform resources and assistance provided to I-REN public sector customers.
- Develop regionally-focused tools and resources to increase energy efficiency and distributed energy resource program participation in the public sector, and allow I-REN to serve as a clearinghouse for relevant information.
- Coordinate with BUC software provider to inform solution design and ongoing enhancements.

Deliverables:

1. Kick-off meeting agenda and notes.
2. Program Manual.
3. Implementation Plan content, e.g., program process flow, diagram, logic model.
4. Participant forms and other collateral.
5. Coordination process documentation.
6. Regionally-focused tools and resources to increase awareness of and participation in energy efficiency and distributed energy resource program participation in the public sector.

Task 1.2: Outreach & Engagement

Program-specific marketing, outreach, and stakeholder engagement activities will be led by the consultant in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN program implementers as applicable. The consultant will be responsible for each activity listed below:

- Review existing I-REN branding, marketing strategies, templates, and other relevant materials.
- Recommend and develop marketing and outreach collateral in various formats targeted to public

sector customer audiences.

- Develop culturally specific strategies to reach communities where language, socio-economic status, race, ethnicity, etc. have historically been a barrier.
- Identify and implement strategies for outreach to local jurisdictions and agencies to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.
- Collaborate with local governments, tribes, and special districts to design and deliver messaging to the community to promote local leadership in energy efficiency by highlighting success stories from local strategic energy plans and projects.
- Set targets and milestones for outreach and engagement, and report on progress.

Deliverables:

1. Outreach plan with targets and milestone schedule.
2. Content for an e-newsletter targeted to local government audiences.
3. Comprehensive website content including a listing of events, resources and tools for local governments.
4. Content and strategy for targeted use of social media, and other channels to promote public sector resources.
5. Case studies highlighting local project success stories.
6. Other outreach materials as recommended by consultant.

Task 1.3: Program Implementation

The consultant will lead all program implementation activities in coordination with the I-REN team, with responsibility for each activity listed below:

- Establish and actively manage communication with local governments, special districts, and tribal communities; identify energy efficiency champions, department decisionmakers, and facility staff and build relationships with them.
- Provide concierge-style, person-to-person support via phone, email, and in person for public sector customers to assess jurisdictions' needs and get higher levels of assistance and support for their energy efficiency projects.
- Assist participants through multiple stages of engagement: strategic energy planning and benchmarking, project opportunity scoping, incentive program identification and participation, contracting and procurement, installation, and ongoing operations and commissioning.
- Develop or enhance strategic energy plans to connect local government goals related to climate, resilience, and economic development to energy efficiency programs and adoption.
- Coordinate with Energy-Efficiency Fellows for public sector work where appropriate, in collaboration with I-REN Workforce Education & Training (WE&T) initiatives.
- Deliver resources for the public sector to tap into energy efficiency and distributed energy resources programs offered by I-REN and other program administrators.
- Maintain communication to monitor status and encourage progress; follow up on completed projects to ensure efficient operations and ongoing maintenance, and address facility staff turnover and retraining needs.
- Document and report on program implementation activities and participant interactions.
- Conduct regular (e.g., weekly or biweekly) meeting with I-REN to provide status updates.

Deliverables:

1. Documentation of participant interactions.
2. Monthly and quarterly status reports.
3. Meeting agendas and status updates.

Task 1.4: Other Services

The consultant will also be responsible for the activities listed below:

- Provide program-specific content and/or review of content as needed for I-REN regulatory documents and filings, e.g., Joint Cooperation Memorandum (JCM), Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- Collect program data to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Contribute to program performance analysis and evaluation, measurement and verification (EM&V) activities for tracking program achievements and informing continuous improvement.

Deliverables:

1. Program-specific content and edits or updates to content for I-REN regulatory filings.
2. Program data in alignment with CPUC reporting templates, metrics, indicators, and other performance measurements.
3. Analysis of program performance and recommendations for future program improvements.

Scope 2: Public Buildings Normalized Meter Energy Consumption (NMEC) Incentive Program Implementation

Task 2.1: Program Design

The consultant will provide leadership for program design activities in collaboration with the I-REN team. The program's design must be aligned with the I-REN Business Plan and all other applicable requirements for REN energy efficiency programs. The program must also comply with any and all applicable CPUC guidance regarding NMEC, such as the current version of the NMEC Rulebook. The consultant will be responsible for each activity listed below:

- Conduct a kick-off meeting with the I-REN team within two weeks of final contract.
- Develop an NMEC program delivery model that supports I-REN's goals for the program, overcomes public sector participation barriers, and prioritizes service to vulnerable communities.
- Support I-REN in engaging with local and regional stakeholders to ensure the program design fits the needs of local governments in the region.
- Define and document program eligibility guidelines and verification process, program team roles, and other relevant program processes and procedures.
- Design NMEC incentive structure and payment process.
- Document NMEC savings calculation methodology and develop a Measurement and Verification (M&V) Plan in compliance with all relevant CPUC guidance and requirements.

- Establish close coordination processes with the other I-REN Public Sector offerings included in this RFP.
- Coordinate with the I-REN Public Sector TA Program to develop a seamless participation pathway for customers from the TA program into the NMEC Program.
- Coordinate with the Public Sector Financing Services to provide concierge-style services to customers for layering financing with their NMEC projects.
- Develop participant forms, agreements, and other program collateral.
- Coordinate with BUC software provider to inform solution design and ongoing enhancements.

Deliverables:

1. Kick-off meeting agenda and notes.
2. Eligibility guidelines and verification process.
3. NMEC incentive structure and payment process.
4. Documentation of NMEC savings calculation methodology.
5. Program Manual.
6. Implementation Plan content, e.g., program process flow, diagram, logic model, NMEC M&V Plan.
7. Documentation of coordination process with the TA Program and Public Sector Financing Services.
8. Participant forms, agreements, and other collateral.

Task 2.2: Outreach & Engagement

Program-specific marketing, outreach, and stakeholder engagement activities will be led by the consultant with support from and in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN program implementers as applicable. The consultant will be responsible for each activity listed below:

- Review existing I-REN branding, marketing strategies, templates, and other relevant materials.
- Recommend and develop marketing and outreach collateral in various formats targeted to public sector customer audiences, in close coordination with I-REN marketing consultant and TA Program implementer as applicable.
- Develop culturally specific strategies to reach communities where language, socio-economic status, race, ethnicity, etc., have historically been a barrier.
- Coordinate with I-REN's TA Program implementer and financing services provider as applicable to identify and implement strategies for outreach to local jurisdictions and agencies to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.
- Coordinate with I-REN's TA Program implementer and financing services provider as applicable to collaborate with local governments, tribes, and special districts to design and deliver messaging to the community to promote local leadership in energy efficiency by highlighting success stories from local projects.
- Set targets and milestones for outreach and engagement and report on progress.

Deliverables:

1. Outreach plan with targets and milestone schedule.

2. Content for an e-newsletter targeted to local government audiences.
3. Comprehensive website content describing program.
4. Content and strategy for targeted use of social media, and other channels to promote public sector incentives.
5. Content for case studies highlighting local project success stories.
6. Other outreach materials as recommended by consultant.

Task 2.3: Program Implementation

The consultant will lead all program implementation activities in coordination with the I-REN team, with responsibility for each activity listed below:

- Coordinate closely with the TA Program to guide customers seamlessly from technical assistance into NMEC Program participation.
- Also, in coordination with the TA Program, establish and actively manage communication with local governments, special districts, and tribal communities, identify energy efficiency champions, and build relationships with them.
- Provide concierge-style, person-to-person support for public sector customers entering the NMEC Program.
- Assist participants through multiple stages of engagement: project opportunity scoping, contracting and procurement, installation, M&V, and incentive payment.
- Document and report on program implementation activities, e.g., participant interactions, project pipeline, active project statuses, risk mitigation, etc.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.

Deliverables:

1. Documentation of program implementation activities.
2. Monthly and quarterly status reports.
3. Meeting agendas and status updates.

Task 2.4: Other Services

The consultant will also be responsible for the activities listed below:

- Develop and perform quality assurance and quality control (QAQC) processes to ensure participant eligibility, avoid double-dipping with other ratepayer-funded programs, prevent program “gaming,” etc.
- Request and collect data from IOU program administrators sufficient to support baseline and savings calculation methodology, as applicable.
- Collect and provide I-REN program data to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Provide program-specific content and/or review of content as needed for I-REN regulatory documents and filings, e.g., JCM, Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- Contribute to program performance analysis and EM&V activities for tracking program achievements and informing continuous improvement.

Deliverables:

1. Documentation of QAQC processes.
2. Program-specific content and edits or updates to content for I-REN regulatory filings.
3. Program data in alignment with CPUC reporting templates, metrics, indicators, and other performance measurements.
4. Analysis of program performance and recommendations for future program improvements.

Scope 3: Public Sector Financing Services

Task 3.1: Financing Services Design

The consultant will be responsible for developing a financing offering consisting of one or more financing mechanisms that can be layered with the TA and NMEC Public Sector Programs, to overcome upfront-cost financial barriers for public sector jurisdictions pursuing energy efficiency and climate resiliency projects. Financing services proposed must be aligned with the I-REN Business Plan and all other applicable requirements for REN energy efficiency and financing programs. The consultant will be responsible for the following:

- Conduct a kick-off meeting with the I-REN team within two weeks of final contract.
- Develop financing offering and delivery model that layers with I-REN's TA and NMEC Programs, overcomes public sector participation barriers, and prioritizes service to vulnerable communities.
- Support I-REN in engaging with local and regional stakeholders to ensure the financing offering fits the needs of local governments in the region.
- Define eligibility guidelines, terms and conditions, and other processes and procedures for participation in financing services.
- Establish coordination process with I-REN's TA and NMEC Programs to ensure a seamless experience for customers in layering financing with the projects they pursue in other programs.
- Develop participant forms, agreements, and other collateral.
- Provide financing-related content for inclusion in other I-REN program manuals, IPs, etc.
- Coordinate with BUC software provider to inform solution design and ongoing enhancements.

Deliverables:

1. Kick-off meeting agenda and notes.
2. Financing offering documentation and procedures.
3. Participant forms, terms and conditions, and other collateral.
4. Program manual and IP content.

Task 3.2: Marketing & Outreach

Financing-specific marketing, outreach, and stakeholder engagement activities will be led by the consultant with support from and in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN program implementers as applicable. Messaging regarding financing services should be incorporated in I-REN's TA and NMEC Program outreach collateral wherever applicable. The consultant will be responsible for each activity listed below:

- Review existing I-REN branding, marketing strategies, templates, and other relevant materials.
- Develop financing marketing and outreach plan, set targets and milestones, and report on progress.
- Recommend and develop standalone collateral and/or content to add to other I-REN program collateral for marketing and outreach targeted to public sector customer audiences.
- Collaborate with TA and NMEC Program implementers as applicable to include financing content in outreach to local jurisdictions and agencies to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.

Deliverables:

1. Outreach plan with targets and milestone schedule.
2. Standalone and/or added content for various outreach formats, e.g., e-newsletter, website, social media, and other channels.
3. Content for case studies highlighting local project success stories and other outreach materials as recommended by consultant.

Task 3.3: Financing Implementation

The consultant will lead all financing implementation activities in close coordination with the TA and NMEC Programs and I-REN team, with responsibility for each activity listed below:

- Coordinate closely with the TA and NMEC Programs to guide customers in layering financing with their projects in the other programs.
- In coordination with I-REN staff, Energy-Efficiency Fellows, and the TA and NMEC Programs, establish and actively manage communication with local governments, special districts, and tribal communities, and identify energy efficiency champions and build relationships with them.
- Provide concierge-style, person-to-person support for public sector customers to assist them through multiple stages of engagement: navigating the financing options available to them, the decision process, and the follow-through to implement the financing mechanisms selected for projects.
- Document and report on financing implementation activities, e.g., participant interactions, financed projects and statuses, risk mitigation, etc.
- Conduct regular (e.g., weekly or biweekly) meeting with I-REN to provide status updates.

Deliverables:

1. Documentation of financing implementation activities.
2. Monthly and quarterly status reports.
3. Meeting agendas and status updates.

Task 3.4: Other Services

The consultant will also be responsible for the activities listed below:

- Provide financing-related content and/or review of content as needed for I-REN regulatory documents and filings, e.g., Joint Cooperation Memorandum, Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.

- Collect financing-related data as applicable to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Contribute to financing-related performance analysis and evaluation, measurement and verification (EM&V) activities for tracking I-REN public sector portfolio achievements and informing continuous improvement.

Deliverables:

1. Financing-specific content and edits or updates to content for I-REN regulatory filings.
2. Financing-related data in alignment with CPUC reporting templates, metrics, indicators, and other performance measurements.
3. Analysis of financing-related performance and recommendations for future improvements.

The Energy Coalition will provide a presentation on the Public Sector Programs at the April 18, 2023, I-REN Executive Committee meeting.

Prior Action(s):

None.

Fiscal Impact:

This item is for informational purposes; therefore, there is no fiscal impact. All costs associated with the development of the I-REN Public Sector activities are included in WRCOG's adopted Fiscal Year 2022/2023 Agency Budget under the Energy & Environmental Department.

Attachment(s):

None.



Inland Regional Energy Network

I-REN Executive Committee

Staff Report

Subject: I-REN Orientation Meeting(s) Update
Contact: Tyler Masters, WRCOG Program Manager, tmasters@wrcog.us, (951) 405-6732
Date: April 18, 2023

Requested Action(s):

1. Receive and file.

Purpose:

The purpose of this item is to provide an update on the 18 I-REN orientation meetings being scheduled across Riverside and San Bernardino Counties.

Background:

At its February 21, 2023, meeting, the Executive Committee approved contracts with program implementers to support the design and delivery of program resources to I-REN member agencies and their communities. With these implementers on board, and some programs (e.g., I-REN Energy Fellowship) under development, COG partner staff have begun providing updates on I-REN program services to their respective committees as well as developing the plan for the deployment of a series of I-REN orientation meetings to provide a robust introduction to I-REN programs, services, and offerings.

The I-REN orientation meetings are intended as a comprehensive, introductory meeting for city and county staff at I-REN member agencies on the programs and services available within each of the three sectors that I-REN will service: 1) Public, 2) Workforce, Education & Training, and 3) Codes & Standards. To maximize participation, I-REN staff have developed a series of 18 orientation meetings spread evenly and strategically across Riverside and San Bernardino Counties, to maximize participation from all member agencies.

County	Participating Jurisdictions					
Riverside	Calimesa	Banning	Beaumont			
Riverside	Moreno Valley	Perris	Menifee			
Riverside	Hemet	San Jacinto				
Riverside	Canyon Lake	Lake Elsinore	Wildomar	Murrieta	Temecula	
Riverside	Eastvale	Jurupa Valley	Riverside	Corona	Norco	
Riverside	Coachella	Indio	La Quinta			
Riverside	Desert Hot Springs	Palm Springs	Cathedral City	Rancho Mirage	Palm Desert	Indian Wells
Riverside	Blythe					

Riverside	County of Riverside					
San Bernardino	Chino Hills	Chino	Montclair	Ontario	Upland	Rancho Cucamonga
San Bernardino	Fontana	Rialto	Colton	Grand Terrace		
San Bernardino	San Bernardino	Highland				
San Bernardino	Redlands	Yucaipa	Loma Linda			
San Bernardino	Hesperia	Victorville	Adelanto	Apple Valley	Barstow	
San Bernardino	Big Bear Lake	Arrowhead / Wrightwood				
San Bernardino	Yucca Valley	Twenty-Nine Palms				
San Bernardino	Needles					
San Bernardino	County of San Bernardino					

These orientation meetings will be similar in every aspect, and in the case a jurisdiction misses the meeting in their area, they can participate in any of the remaining meetings. The meetings will last approximately 4 - 6 hours and will include presentations from consultants, a demonstration on the Building Upgrade Concierge (BUC) software, and will give I-REN staff and consultants an opportunity to gather important and relevant data about each member jurisdiction and their needs. Staff is currently working on a schedule and central locations to host the meetings within each of the groupings.

The agenda for the meetings will include participation and updates from program staff as well as consultant staff to inform each member agency on the services that will be available to them and their community members. The agenda is being finalized, but will include and not be limited to:

- Public Sector resources
 - Strategic Energy Planning and Technical Assistance offerings
 - Building Upgrade Concierge (BUC) web-based platform tool and services
- Workforce, Education & Training Sector resources
 - Energy Fellowship
 - Energy Certification and Accreditation Program
- Codes & Standards Sector resources
 - Schedule of Training
 - Department of Energy and California Energy Commission partnerships and collaborations

I-REN staff will finalize the agenda and begin scheduling at least one orientation meeting per week for the months of May through June. It is anticipated that the orientations will occur through summer and, possibly, into the early fall.

Prior Action(s):

None.

Fiscal Impact:

This item is for informational purposes only; therefore, there is no fiscal impact. All costs associated with the development and deployment of I-REN Orientation meeting activities are included in WRCOG's adopted Fiscal Year 2022/2023 Agency Budget under the Energy & Environmental Department.

Attachment(s):

None.



Inland Regional Energy Network I-REN Executive Committee

Staff Report

Subject: Equitable Distribution of I-REN Program Resources
Contact: Casey Dailey, WRCOG Director of Energy & Environmental Programs,
cdailey@wrcog.us, (951) 405-6720
Date: April 18, 2023

Requested Action(s):

1. Receive and file.

Purpose:

The purpose of this item is to provide an update on considerations for managing the equitable distribution of I-REN resources as established by the California Public Utilities Commission.

Background:

The I-REN Program is a collaborative effort between the Western Riverside Council of Governments (WRCOG), San Bernardino Council of Governments (SBCOG), and the Coachella Valley Association of Governments (CVAG). The vision for the I-REN Program as indicated in the Business Plan is to connect local governments, businesses, and residents to a wide range of energy efficiency resources and services to increase energy savings and equitable access throughout San Bernardino and Riverside Counties. The Inland Empire region is distinct from other Southern California areas, with its own robust culture and identity. I-REN has a unique opportunity to bring resources to both San Bernardino and Riverside Counties that were underserved by other programs.

During the Executive Committee meeting on March 21, 2023, there was a request for I-REN staff to develop a proposal on how to allocate I-REN funds throughout the Inland Empire in an equitable manner over time. In response, I-REN staff wanted to provide some background on this topic, an update on the ongoing discussions between the staffs of the three Councils of Governments (COGs), and insights on how the equitable distribution of I-REN resources was established by the California Public Utilities Commission (CPUC).

The I-REN Program is a collaborative effort among WRCOG, SBCOG, and CVAG, under the auspices of the CPUC pursuant to the I-REN Business Plan that the CPUC approved on November 18, 2021. The three COGs formed a new Regional Energy Network (REN) in the Inland Empire to provide consistent and expanded energy efficiency (EE) programs to a region where the COGs have long-term partnerships with their 52 cities, Tribal nations, and the Boards of Supervisors from both counties. Moreover, I-REN's formation gives a chance for both San Bernardino and Riverside Counties to gain resources relative to the pre-I-REN condition, when these Counties were previously served by SoCal REN.

The vision for the I-REN Program, as indicated in the Business Plan, is to connect local governments, Tribes, businesses, and residents to a wide range of EE resources and services to increase energy savings and equitable access throughout San Bernardino and Riverside Counties. As the CPUC noted in Decision 21-11-013 approving the Business Plan and I-REN's total budget of \$65.6M provided through 2027, I-REN's Business Plan was written with equity at the center of the sector and proposed program selection. I-REN's geographic area has large sections that are characterized as disadvantaged communities, contain Tribal lands, or have a population with a median income 60% below the statewide median. In its Decision, the CPUC asked I-REN to begin its focus on disadvantaged and underserved populations as soon as possible.

I-REN is authorized to implement Programs in three Sectors: Public Sector, Workforce Education & Training (WE&T), and Codes & Standards. From a geographic standpoint, it is important to recognize that some of the implementation resources will be of direct benefit to the entire I-REN service area and do not require geographic distribution criteria. Some of the resources accessible without regard to geography are as follows:

1. Virtual trainings and webinars on codes and standards and tools for the Building Upgrade Concierge.
2. WE&T resources related to energy efficiency (e.g., training on specific topics such as energy audits).
3. Other training and educational materials and resources that do not require personalized outreach.

Where there are geographic considerations of ensuring equitable access to resources, I-REN staff is working with its consultant team to develop a framework that will live in the Strategic Plan, which is currently under development and will ultimately be approved by the Executive Committee, to memorialize how those program resources will be distributed. From the CPUC's perspective, and as previously mentioned, the focus should start with the most hard-to-reach and disadvantaged communities within the I-REN service territory.

As I-REN begins to roll out its initial set of offerings, staff wanted to provide a few examples to highlight how staff intends to ensure all portions of the service territory are serviced. The first example is the I-REN orientations that are currently planned for the late spring and summer months. There will be 18 I-REN regionwide orientations (nine will be in Riverside County; nine will be in San Bernardino County).

Additionally, the I-REN Energy Fellowship Program has a budget to fund 27 Fellows annually. This number was based on the 54 public agencies in San Bernardino and Riverside Counties, including 52 cities and both Counties. This approach ensures that all 54 public agencies in the I-REN service territory will have the opportunity to have a Fellow every other year. All three of the I-REN member COGs are currently presenting the Fellowship Program to their respective Committees and soliciting interest in host agencies. To the greatest extent possible, I-REN Fellows will be evenly distributed based on participation. The primary objective is to place 27 Fellows throughout the I-REN service territory each year, regardless of location. The secondary objective is to have as close to an even distribution of Fellows between both Counties and the three respective COGs, ensuring that all agencies can have a Fellow every other year, with a target of having up to 13 Fellows in San Bernardino County and up to 14 Fellows in Riverside County.

There are other Programs that are still in the development stage, so it would be premature to expand on how those resources will be divided – except to acknowledge that in the I-REN Strategic Plan, it is

anticipated that an entire goal will be dedicated to proactive and equitable access to program resources and services. At the May Executive Committee meeting, staff anticipates starting the discussion on the Strategic Plan Goals & Objectives.

Staff are committed to ensuring that I-REN programs are available to everyone in the region equally, with particular attention and priority given to those who have historically been left out of energy programs, inclusive of training, education, knowledge transfer, or due to lack of resources. Finally, it is important to note that the other RENs in California have all had historical challenges spending their respective annual budgets.

Additional discussion on this matter is expected as part of a future strategic planning session in May 2023 and beyond.

Prior Action(s):

None.

Fiscal Impact:

This item is for informational purposes only; therefore, there is no fiscal impact. All costs associated with the development of I-REN's Program Implementation are included in WRCOG's adopted Fiscal Year 2022/2023 Agency Budget under the Energy & Environmental Department.

Attachment(s):

None.