



# Inland Regional Energy Network I-REN Executive Committee

## AGENDA

Tuesday, May 16, 2023  
2:00 PM

WRCOG  
3390 University Avenue, Suite 200  
Citrus Conference Room  
Riverside, CA 92501

### Remote Meeting Locations:

227 Pardee Street  
San Diego, CA 92102

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

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

### [Public Zoom Link](#)

Meeting ID: 871 3726 2721

Passcode: 670505

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](mailto: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](mailto: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 April 18, 2023, Executive Committee Meeting**

**Requested Action(s):** 1. Approve the Summary Minutes from the April 18, 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. I-REN Strategic Planning Update**

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

**B. Codes & Standards Program Update**

**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, August 15, 2023, at 2:00 p.m., at WRCOG's office located at 3390 University Avenue, Suite 200, Riverside, CA.

**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 April 18, 2023, at the San Bernardino Council of Governments, 1170 West Third Street, 1st Floor Board Room, San Bernardino, CA.

### 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:
  - City of Rialto - Deborah Robertson
  - Town of Apple Valley - Art Bishop
- WRCOG:
  - City of Corona - Jacque Casillas
  - City of Jurupa Valley - Chris Barajas
  - City of San Jacinto - Crystal Ruiz
- Not Present:
  - County of San Bernardino - Curt Hagman

### 4. PUBLIC COMMENTS

There were no public comments.

### 5. CONSENT CALENDAR

**RESULT: APPROVED AS RECOMMENDED**

**MOVER:** Robertson

**SECONDER:** Bishop

**AYES:** Ortiz, Robertson, Bishop, Casillas, Barajas, Ruiz

**ABSENT:** Hagman

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

**Action:**

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

## **B. I-REN Regulatory and Reporting Update**

### **Action:**

1. Received and filed.

## **6. REPORTS / DISCUSSION**

### **A. Approval of Fiscal Year 2023/2024 Agency Budget**

Casey Dailey, WRCOG Director of Energy & Environmental Programs, reported that in 2021, the California Public Utilities Commission (CPUC) approved I-REN's budget of \$65.6M, to be distributed in calendar years 2022 through 2027. Local governments operate on a fiscal year, while the CPUC operates on a calendar year, which means that the Committee will be approving half of the remaining calendar year 2023 budget, and half of the following calendar year 2024 budget. The total I-REN budget is part of the WRCOG annual budget, and the WRCOG Executive Committee will meet in May to approve the WRCOG Agency Fiscal Year (FY) 2023/2024 budget. The WRCOG Executive Committee will only be approving I-REN's maximum revenue and maximum expenditure numbers, and the I-REN Executive Committee will be responsible for approving the line items. An Advice Letter will be filed with the CPUC in September to reallocate unspent dollars into the 2024-2027 budgets.

Committee member Art Bishop asked if the Committee is able to approve line items throughout the six year period, or does it have to be done one year at a time?

Mr. Dailey replied that there will not be a need to send another Advice Letter for subsequent years. If there are unspent funds by the end of 2027 then those unspent funds will be returned to the CPUC and I-REN must file for a new Business Plan.

The FY 2023/2024 I-REN budget is allocated by sector: Public Sector, Workforce Education and Training, and Codes & Standards. Line items for each Sector include contracts with various service providers, staffing reimbursements for each COG, outreach, and the budget for direct incentives which will be developed by implementers using I-REN Executive Committee input.

### **Action:**

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

**RESULTS: APPROVED AS RECOMMENDED**

**MOVER:** Casillas

**SECONDER:** Barajas

**AYES:** Ortiz, Robertson, Bishop, Casillas, Barajas, Ruiz

**ABSENT:** Hagman

## **B. Public Sector Program Updates**

Benjamin Druyon, WRCOG Program Manager, introduced Julie Castro from The Energy Coalition, who

gave a presentation on the Public Sector Program. The Energy Coalition partners with Alternative Energy Systems Consulting and TRC for energy engineering support, and Public Financial Management for finance support to complete energy projects.

The Energy Coalition (TEC) offers various project support services. Through energy data collection and analysis, TEC helps I-REN member agencies determine their priorities and figure out which sites to focus on energy efficiency improvements. An energy audit is conducted to come up with measures that the I-REN member agencies can implement to meet those priorities. TEC provides project financial analysis to review all of the opportunities available such as grants, incentives, or financing to cover the project costs, and helps the agency with the application process to obtain funding.

In addition to project support, The Energy Coalition also provides continuous engagement in the diverse communities that the I-REN represents. It begins with territory-wide orientations to introduce I-REN services to member jurisdictions to their determine needs and how the REN can provide support. Capacity building is developed through education via workshops or webinars to grow staff expertise in the various energy project areas. To acknowledge the completion of projects and to inspire similar projects, case studies are done and success is celebrated.

The Energy Coalition collects utility data such as consumption and cost, as well as facility information including age and square footage, GIS data, and more. The Energy Star Portfolio Manager is used to leverage data points as well as individual meters, and compare with other similar facilities. Based on this information, the I-REN member agencies can prioritize the sites they are responsible for and create a plan to target facilities and achieve the overall energy efficiency vision.

Financial analyses are conducted to show project costs, benefits, and savings. TEC looks at outside resources that the I-REN can leverage to reduce the upfront capital needed to make the project possible. This includes grants, financing, and incentives, and TEC will assist with the applications and grant writing.

Committee member Oscar Ortiz would like to include kilowatt hours (kWh) in the metrics to measure the efficiencies of different projects.

Ms. Castro stated that continuous engagement is important to build relationships between the I-REN and their member agencies. Having conversations with the agencies regarding their energy goals will help build a customized plan to help meet their specific needs. Workshops and capacity-building webinars will help increase staff knowledge and skills.

Committee member Deborah Roberts asked what the largest project that The Energy Coalition has engaged in, and would like to weigh the benefits about adopting a micro-grid project.

Rebecca Hausheer from The Energy Coalition stated that the streetlight projects were one of the largest projects, one of which accumulated over eight million kWh in savings. Other large projects are generally water or waste water optimization projects, and building controls can yield significant bill and energy savings.

Committee member Bishop emphasized the importance of continuous engagement and tracking everything because the the I-REN will eventually have to present its accomplishments to the CPUC in order to continue the program.

Ms. Castro explained that the Normalized Metered Energy Consumption (NMEC) program measures savings at the meter. It compares the pre-project consumption with the post-project consumption to evaluate the energy savings through that project. NMEC incentivizes all savings, not just those that meet the California energy code. Traditional programs often incentivize per unit for lighting or HVAC, whereas NMEC incentivizes based on saved kWh. This allows for much greater incentives and savings recognized by the CPUC.

There are different ways to structure program incentives. An incentive structure based on kWh is not concerned when the energy savings are achieved, whereas a structure based on greenhouse gas (GHG) emissions would be a tiered structure with higher incentives during certain hours of operation. Ms. Castro highlighted that based on the NMEC rulebook, 50% of the total incentive will be paid out after either one year, or two years of project performance.

There are various design parameters that the Committee can consider when customizing the I-REN NMEC Program to fit the needs of the community. The parameters would determine how the incentives would be provided, the incentive rate (kWh and therms vs GHG emissions), additional incentives to recognize certain priorities, and a procurement model with or without equipment and labor included in the model.

Committee member Bishop stated that most City Managers would primarily be concerned about the money that a program can save them, with the other benefits coming second.

The Energy Coalition staff will meet with member agencies through in-person orientation workshops to assess the needs and tailor support for each agency. They will then finalize the Implementation Plan following regulatory requirements, and finally develop and launch those programs and services.

Committee member Ortiz would like to keep in mind that the cooling centers with aging HVAC systems may need to be improved to keep the centers going through the hot summer months.

Committee member Art Bishop stated that the mountain area received heavy snow, and many roofs will have to be rebuilt. He asked if heavier insulation would be included in the energy savings.

Ms. Castro agreed that insulation could be included as a measure in the NMEC program, and can be incentivized if it helps save energy.

**Action:**

1. Received and filed.

**C. I-REN Orientation Meeting(s) Update**

Tyler Masters, WRCOG Program Manager, introduced the I-REN Orientation Meetings. There will be 18 half-day meetings, nine in Riverside County, and 9 in San Bernardino County, which are organized by subregional geographic areas. Meetings will take place from May 2023 through the end of summer 2023, and will talk about I-REN background, Local Government Sustainable Energy Coalition membership, and services provided by the three I-REN sectors.

Committee member Deborah Robertson pointed out that there is the ICSC conference, as well as other



external meetings in the month of May.

Casey Dailey reassured Committee member Robertson that the dates will be coordinated to avoid conflicting dates. Zoom links will be available for those agencies that wish to attend remotely, or they may attend any of the other meeting dates if their scheduled date is not convenient.

Chair Ruiz is excited about the I-REN program and encourages Committee members to join programs in their region, and be the face of the project.

**Action:**

1. Received and filed.

**D. Equitable Distribution of I-REN Program Resources**

This item was the first to be presented.

Casey Dailey, WRCOG Director of Energy and Environmental Programs, discussed the equitable distribution of I-REN resources. The I-REN business plan was written with equity at the center, and focuses on disadvantaged and underserved communities. However, there are some resources available without regard to geography, such as virtual trainings and webinars, and other training and educational materials that will be available to anyone with internet access.

Further examples of how resources will be allocated can be found in the I-REN Energy Fellowship Program, and the I-REN orientation meetings. The primary objective of the Fellowship Program is to place 27 Fellows annually in the I-REN service territory, with 13 in San Bernardino County and 14 in Riverside County. Member agencies would host a Fellow every other year.

For the I-REN orientation meetings, there will be 18 meetings throughout the summer beginning in May 2023. Nine meetings will be held in Riverside County, and nine will be in San Bernardino County. Staff are committed to ensuring that I-REN programs are available to everyone in the region equally, with priority given to those who have historically been left out.

Committee member Jacque Casillas appreciates that equitable distribution is the primary focus, and that the Committee will have an opportunity to create the rules of such distribution when approving the I-REN Strategic Plan.

Committee member Art Bishop thanked staff and is looking forward to seeing the Strategic plan, but appreciates the equity among the three COGs.

Committee member Deborah Robertson would like more clarity on how the webinars, orientations, and Fellowship Program will come about. She stated that using Zoom for the orientation meetings would allow for a bigger audience when people are not able to attend in person.

Committee member Oscar Ortiz added that one of the issues with other RENs has been in the distribution of funds. The flexibility of the I-REN structure allows for unused funds to be distributed to where there is room available.

Chair Crystal Ruiz commended staff, and suggested that I-REN use WRCOG's Fellowship Program structure as a template for its own Fellowship Program.

**Actions:**

1. Received and filed

**7. REPORT FROM THE EXECUTIVE COMMITTEE CHAIR**

Chair Ruiz reported that I-REN meetings for June and July will be cancelled, and the Committee will reconvene in August, 2023.

**8. ITEMS FOR FUTURE AGENDAS**

There were no 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 May 16, 2023, at a location yet to be determined.

**11. ADJOURNMENT**

The meeting was adjourned at 3:24 p.m. in honor of the late Karlee Meyer, City of Hemet.



# 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](mailto:dfreedman@cvag.org), (760) 346-1127  
**Date:** May 16, 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.

- [Administrative Law Judge’s Ruling](#) (April 17, 2023) – Provides notice of a draft 2023 Potential and Goals Study that will inform the CPUC’s adoption of energy efficiency goals for 2024 and beyond. Parties are invited to file comments on the draft study, and address the questions included in this ruling, no later than May 8, 2023, and reply comments no later than May 18, 2023.

The CPUC Potential and Goals Study historically (and continuing with this 2023 study) has provided data and analysis at the IOU Program Administrator (PA) level and is used to set savings goals for the IOU PAs. The Potential and Goals Study does not set goals for RENs and CCA PAs. There is a separate goal-setting process for non-IOU PAs as outlined in D.21-09-037. However, there are useful insights that can be gained from reviewing the study, e.g., trends in technologies and policy implications, which could inform I-REN program offerings. I-REN is not filing comments but will monitor comments filed by other parties in response to this ruling.

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.
- [D.23-04-035](#) (April 6, 2023) – Addresses a CPUC staff proposal for reducing ratepayer-funded incentives for natural gas EE measures. This Decision also: (1) establishes a framework that defines and allows continued funding of “exempt measures” — measures that result in gas savings but do not burn gas; (2) establishes a means to determine whether a given measure is (or is not) cost-effective; and (3) provides for working groups to examine and recommend technical guidance for identifying a viable electric alternative (for a given gas measure) and further criteria for custom projects. It has near-term implications for I-REN regarding required participation in a stakeholder process to develop a technical guidance document, plus required additions to 2028 portfolio filings to be submitted in 2026, and potentially other reporting implications.

### 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

- Q2 - Q3 2023 – Proposed Decision and CPUC Decision on REN Business Plan Applications.
- Q3 - Q4 2023 – Energy Division-hosted meeting to discuss metrics (details TBA).



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.
- 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 27, 2023 – WRCOG on behalf of I-REN filed a response to the ALJ Ruling and provided the following comments:
  - I-REN supports the adoption of an SCT for informational purposes. Having the SCT as an additional reference point will provide a more comprehensive view of the benefits and costs of DERs such as energy efficiency. The adopted SCT could be used for informational purposes across all DER proceedings and should retain flexibility to continue being iterated as new methodologies and new data sets become available.
  - I-REN believes that the methodology used in the Quantifying the Air Quality Impacts of Decarbonization and Distributed Energy Programs in California study is reasonable and accurate. The results of this study could provide valuable inputs to an SCT, particularly given its granular approach to modeling air quality impacts compared to the Air Quality Adder described in the SCT impact evaluation and should be considered when evaluating the cost-effectiveness of DER programs, particularly in the context of societal benefits that are not captured by current cost-effectiveness testing.
- 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. The new funding became available in mid-April 2023.

### 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

- May 3, 2023 – The first five draft Codes and Standards Enhancement (CASE) Reports have been published and are ready for stakeholder comments by May 30, 2023.
- July 2023 - 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*

<b>Report Type</b>	<b>Due Date</b>	<b>Content</b>	<b>Status</b>
<b>Monthly Report</b>	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.
<b>2022 Q4 Claims</b>	3/1/2023	Program expenditures and committed funds (YTD) PLUS Project level savings, measures, participant costs, incentives, etc., being claimed in Q4.	In progress as part of 2022 Annual Claims True up.
<b>2022 Annual Monthly Report</b>	5/15/2023	"Month 13" report to align savings and expenditures with annual claim true up and annual report.	In progress. Deadline extended for all PAs in ALJ Email Ruling 3/28/23.
<b>2022 Annual Report</b>	5/15/2023	Narrative and spreadsheet format report on overall Portfolio performance and Program level accomplishments.	In progress. Deadline extended for all PAs in ALJ Email Ruling 3/28/23.
<b>2024 JCM</b>	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.
<b>2022 Annual Claims True up</b>	5/15/23	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.	In progress. Deadline extended for all PAs in ALJ Email Ruling 3/28/23.
<b>2023 Q1 Claims</b>	TBD	Program expenditures and committed funds (YTD) PLUS Project level savings, measures, participant costs, incentives, etc., being claimed in Q1.	Per ALJ Email Ruling 4/25/23 modifying previous 3/25/23 Email Ruling, PAs can expect further communication from ED staff re: new deadline.
<b>2024-2031 Business Plan True Up Advice Letter</b>	~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><b>Abbreviations: ALJ = Administrative Law Judge; Q = quarter of the year; <a href="#">CEDARS</a> = California Energy Data and Reporting System; CPUC = California Public Utilities Commission; ED = CPUC Energy Division; YTD = year to date; SFTP = Secure File Transfer Protocol; PII = personally identifiable information; PL = program lead; PA = program administrator; FE: Frontier Energy</b></p>			





# Inland Regional Energy Network

## I-REN Executive Committee

### Staff Report

**Subject:** I-REN Strategic Planning Update  
**Contact:** Benjamin Druyon, WRCOG Program Manager, [bdruyon@wrcog.us](mailto:bdruyon@wrcog.us), (951) 405-6727  
**Date:** May 16, 2023

**Requested Action(s):**

1. Receive and file.

**Purpose:**

The purpose of this item is to provide an update on the development of the I-REN Strategic Plan.

**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. On November 18, 2021, the CPUC formally approved the I-REN Business Plan through program year 2027. At the March 21, 2023, meeting, this Committee received an update on the development of the I-REN Strategic Plan and some preliminary survey results.*

I-REN is developing a 5-year organizational Strategic Plan to ensure effective and efficient use of CPUC funding, to identify clear priorities and actions, and to ensure that activities and engagement are aligned across all members of I-REN. This process will include several avenues for stakeholder feedback, including a survey, small group conversations, and in-person and virtual community workshops.

The Strategic Plan process presents a key opportunity for the Executive Committee to shape the direction, focus, and priorities of I-REN. The Business Plan serves as "what" I-REN intends to accomplish and the Strategic Plan represents "how" I-REN will accomplish those goals. The development of a Strategic Plan will include input and insight from I-REN Executive Committee members and the communities that I-REN serves and is critical to ensure the effective use of ratepayer dollars in achieving I-REN goals.

This item is reserved for a presentation from BluePoint Planning on the development of the Strategic Plan.

**Prior Action(s):**

**March 21, 2023:** The I-REN Executive Committee received and filed.

**Fiscal Impact:**

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

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

**Attachment(s):**

None.



# Inland Regional Energy Network

## I-REN Executive Committee

### Staff Report

**Subject:** Codes & Standards Program Update

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

**Date:** May 16, 2023

**Requested Action(s):**

1. Receive and file.

**Purpose:**

The purpose of this item is to provide an update on the I-REN Codes & Standards 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) to establish locally administered, designed, and delivered energy efficiency programs. I-REN's Business Plan was approved by the CPUC in 2021 for three sectors: Public, Codes and Standards, and Workforce Education & Training.*

I-REN's Codes & Standards offerings will serve the members of the I-REN COG partners represented in I-REN, and the cities, school districts, water districts, special districts, and tribal communities they represent. I-REN's Codes & Standards Program objectives are:

1. Improve the understanding of energy efficiency codes and standards among local building departments and the building industry to increase implementation, compliance, and enforcement.
2. Make code compliance and enforcement a valuable element of the region's energy efficiency goal attainment with engagement regionwide.
3. Deliver locally informed resources and tools that streamline code compliance and enforcement and increase permit closeout.
4. Provide information to local governments on policy tools available at the local level, including reach codes.

Following a competitive bidding process for I-REN's Codes & Standards Sector, Frontier Energy was selected to develop and implement the following scopes:

1. Codes & Standards Training & Education Program
2. Codes & Standards Technical Support Program

I-REN's Codes & Standards Training and Education Program will establish and implement trainings tailored to the needs of local authorities having jurisdiction and the building industry to support, understand, and effectively implement energy efficiency codes and standards. The Program will also include outreach to engage, educate, and involve regional construction firms and building departments, and support compliance and enforcement within regional energy efficiency programs and customers. Online trainings as well as local, in-person training opportunities will take place in Riverside and San Bernardino Counties, enabling contractors to attend trainings more easily. I-REN trainings will also be differentiated by topic, with trainings tailored to the region's climate zones and the needs of the region's local jurisdictions, building department staff, and building professionals.

I-REN's Codes & Standards Technical Support Program will develop technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes to support improved enforcement and compliance. I-REN will develop regionally appropriate model ordinances, vet and refine them with participating local governments, provide ongoing technical assistance for implementation, and deliver updates to reflect the triennial code cycle. Training partners will include colleges, non-profit organizations, community-based organizations, trade organizations, and other regional entities. I-REN will develop and deploy effective survey instruments to gather data and use that data to inform the design of resources to assist building departments and industry professionals.

For each of these scopes, Frontier 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.

Frontier is currently carrying out a Market Assessment Survey that is designed with objective and subjective questions to inform I-REN's program development for Codes & Standards programs by identifying:

- Current means of identifying permitted and non-permitted energy efficiency activity;
- Baseline participant information about stakeholders;
- Existing tools and practices for energy code compliance;
- Barriers to understanding and enforcing energy efficiency measures; and
- Knowledge gaps, training needs and preferences for energy efficiency workforce.

Following survey administration, Frontier will summarize key takeaways from response results in a Market Assessment report and provide program recommendations. In the meantime, Frontier is preparing an online training on 2022 California Energy Code changes for nonresidential buildings, which is currently scheduled for release in early June 2023.

The detailed Scope of Work for these programs is set out in Attachment 1 to this Staff Report. Frontier will provide a presentation on the Codes & Standards programs at the May 16, 2023, IREN 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 Codes & Standards Program activities are included in WRCOG's adopted Fiscal Year 2022/2023 Agency Budget under the Energy & Environmental Department.

**Attachment(s):**

[Attachment 1 - I-REN Codes & Standards Program Detailed Scope of Work](#)

# Attachment 1

I-REN Codes & Standards Program  
Detailed Scope of Work

## I-REN Codes & Standards Programs

### Detailed Scope of Work

#### SOW 1: Codes & Standards Training & Education Program

This SOW includes professional services for the tasks and deliverables described below, for implementation of I-REN's Codes & Standards Training & Education Program. This program is a non-resource program to establish and implement training and education for building department staff and the building industry to support, understand, and effectively implement energy efficiency codes and standards, including where gaps exist in the Statewide IOU Compliance Improvement program and enforcement activities. The program will also include outreach to engage, educate and involve regional construction firms, architects, industry experts, and building departments, and support compliance and enforcement within regional energy efficiency programs and customers.

To implement the program, the consultant will assist in developing a training curriculum to address gaps in compliance with current requirements and offer ongoing training on changes and trends in codes and standards. The consultant will promote training through I-REN governing agencies' existing marketing channels, through local government partnerships, and through building industry communication networks. The consultant will also collaborate with local governments to design and deliver effective messaging to building departments and private industry during code transitions. It is imperative that the consultant be knowledgeable of existing IOU programs and offerings when developing I-REN's programs to avoid duplication of efforts, which is a requirement of the CPUC.

#### 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 I-REN's Energy Efficiency Business Plan (I-REN BP),<sup>1</sup> CPUC Decision 21-11-013 approving the I-REN BP,<sup>2</sup> and all other applicable requirements for REN energy efficiency programs. 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 execution.
- Develop a program delivery model that supports I-REN's goals for the Training & Education Program, overcomes public and private 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 and other stakeholders in the region.
- Define program eligibility guidelines and program team roles; document program processes and procedures.
- Establish coordination process with other I-REN energy efficiency programs, services, and implementers, e.g., the Codes & Standards Technical Support Program included in this RFP, to maximize program participation and benefits to customers.
- Identify administrators of other Codes & Standards programs and related offerings in the region and establish coordination process to assist I-REN public and private sector customers with enrolling and participating in those programs.
- Develop participant forms and other collateral.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.
- Assist I-REN in the facilitation of a regularly scheduled Codes & Standards Working Group meeting.
- Track and document quantifiable measures to be used to report the successes of the programs.

---

<sup>1</sup> Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

<sup>2</sup> D.21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan

- Whenever possible, incorporate existing successful models and programs into the I-REN program portfolio.

Anticipated deliverables:

- Kick-off meeting agenda and notes.
- Develop a Program Manual.
- Provide Implementation Plan content, e.g., program process flow, diagram, logic model.
- Coordination process documentation.
- Develop participant forms and other collateral.
- Provide monthly and quarterly status reports.
- Provide meeting agendas and status updates.

### 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 and recommend needed changes.
- Recommend and assist in the development of marketing and outreach collateral in various formats targeted to Codes & Standards customer audiences.
- Develop culturally specific strategies to reach communities where language, socio-economic status, race, ethnicity, etc. have historically been a barrier.
- Assist in the development of marketing content for e-communicators, social media, and other channels to promote the training sessions, online Code Hub and building professionals' regional forums.
- Support outreach to potential speakers and presenters.
- Identify and implement strategies for outreach to local jurisdictions and agencies and building professionals to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.
- Identify Codes & Standards champions and build relationships with them.
- Set targets and milestones for outreach and engagement (including hard-to-reach communities) and report on progress.
- Conduct regular (e.g., weekly, or biweekly) meetings with I-REN to provide status updates.

Anticipated deliverables:

- Develop outreach plan with targets and milestone schedule.
- Provide content for an e-newsletter targeted to local government audiences.
- Provide comprehensive website content including a listing of events, resources and tools for local governments and building professionals.
- Develop content and strategy for targeted use of social media, and other channels to promote Codes & Standards resources
- Develop case studies highlighting local success stories.
- Assist with other outreach materials as recommended by consultant.
- Provide monthly and quarterly status reports.
- Provide meeting agendas and status updates.



### Task 1.3: Program Implementation

The consultant will lead all Training & Education Program implementation activities in coordination with the I-REN team. The consultant will develop a training curriculum to address gaps in compliance with current Codes & Standards requirements and changes and trends in Codes & Standards. The consultant will assist I-REN in supporting local governments and the building industry during transitions to new codes to deliver effective messaging and resources and increase timely compliance with updated requirements. The consultant will also foster the development of an online Code Hub community for sharing best practices amongst building departments and the building industry and assist with coordination of Regional Forums. The consultant will be responsible for each activity listed below:

- Deliver a minimum of four training sessions and one Regional Forum per year in each of I-REN's subregions.
- Collate information from attendee surveys following each training session.
- Perform updates of training module content and delivery mechanisms to ensure trainings are responsive to key target audience needs.
- Support participation in online training modules.
- Support coordination with International Code Council (ICC), and any required curriculum updates, to facilitate the ability of I-REN to award Continuing Education Units to attendees of I-REN trainings.
- Track and provide information on California and national codes, including updates to Title 24 Parts 6 (California Energy Code) and 11 (California Green Building Standards Code).
- Perform updates to training curriculums to reflect adopted changes to Title 24 Parts 6 and 11.
- Collect, report, and maintain metrics relative to training and education, including numbers of sessions, numbers of and contact information for attendees, and other relevant metrics as needed.
- Provide recommendations, based on analysis of metrics and knowledge of the field, for improvements to I-REN's training program and topics for potential new training sessions.
- Consistent with available budget and direction from I-REN, develop new training modules for in-person or online delivery.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.

Anticipated deliverables:

- Develop Training & Education Program Implementation Plan that includes timeframe/schedule, roles and responsibilities and proposed curriculum.
- Provide delivery of a minimum of 12 training sessions and three Regional Forums per year throughout the I-REN territory.
- Provide updates of training curriculum to improve the program and to reflect changes to Title 24 Parts 6 and 11.
- Provide assistance with event logistics and follow up activities.
- Provide documentation of participant interactions.
- Provide monthly and quarterly status reports.
- Provide 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.

Anticipated deliverables:

- Develop program-specific content and edits or updates to content for I-REN regulatory filings.
- Provide program data in alignment with CPUC reporting templates.
- Document metrics, indicators, and other performance measurements.
- Provide analysis of program performance and recommendations for future program improvements.

## **SOW 2: Codes & Standards Technical Support Program**

This SOW includes professional services for the tasks and deliverables described below, for implementation of I-REN's Codes & Standards Technical Support Program. This program is a non-resource program to develop technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes to support improved enforcement and compliance. I-REN will also develop regionally appropriate model ordinances, vet and refine them with participating local governments, provide ongoing technical assistance for adoption and implementation, and deliver model ordinance updates to reflect the triennial code cycle.

To implement the program, the consultant will assist in developing technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes. This includes suggesting strategy, conducting research, designing programs and services, and supporting implementation of programs and services to increase energy code compliance rates. The consultant will promote training through I-REN governing agencies' existing marketing channels, through local government partnerships, and through building industry communication networks. The consultant will also assist I-REN in improving consistency in code enforcement and compliance resources across the region by facilitating cooperation among local governments.

### *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 I-REN's Energy Efficiency Business Plan (I-REN BP),<sup>3</sup> CPUC Decision 21-11-013 approving the I-REN BP,<sup>4</sup> and all other applicable requirements for REN energy efficiency programs. 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 execution.
- Develop a program delivery model that supports I-REN's goals for the Technical Support Program, overcomes public and private 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 and other stakeholders in the region.
- Define program eligibility guidelines and program team roles; document program processes and procedures.
- Establish coordination process with other I-REN energy efficiency programs, services, and implementers, e.g., the Codes & Standards Training & Education Program included in this RFP, to maximize program participation and benefits to customers.
- Identify administrators of other Codes & Standards programs and related offerings in the region and establish coordination process to assist I-REN public and private sector customers with enrolling and participating in those programs.

---

<sup>3</sup> Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

<sup>4</sup> D.21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan

- Develop participant forms and other collateral.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.
- Assist I-REN in the facilitation of a regularly scheduled Codes & Standards Working Group meeting.
- Track and document quantifiable measures to be used to report the successes of the programs.
- Whenever possible, incorporate existing successful models and programs into the I-REN program portfolio.

Anticipated deliverables:

- Kick-off meeting agenda and notes.
- Develop a program Manual.
- Provide Implementation Plan content, e.g., program process flow, diagram, logic model.
- Coordination process documentation.
- Develop participant forms and other collateral.
- Provide monthly and quarterly status reports.
- Provide meeting agendas and status updates.

### 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 and recommend needed changes.
- Recommend and assist in the development of marketing and outreach collateral in various formats targeted to Codes & Standards customer audiences.
- Develop culturally specific strategies to reach communities where language, socio-economic status, race, ethnicity, etc. have historically been a barrier.
- Assist in the development of marketing content for e-communicators, social media, and other channels to promote the Technical Support Program.
- Identify and implement strategies for outreach to local jurisdictions and agencies and building professionals 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 and building professionals to design and deliver messaging to the community to promote local leadership in Codes & Standards compliance by highlighting local success stories.
- Set targets and milestones for outreach and engagement (including hard-to-reach communities) and report on progress.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.

Anticipated deliverables:

- Develop outreach plan with targets and milestone schedule.
- Provide content for an e-newsletter targeted to local government audiences.
- Provide comprehensive website content including a listing of events, resources and tools for local governments and building professionals.
- Provide content and strategy for targeted use of social media, and other channels to promote Codes & Standards resources
- Develop case studies highlighting local success stories.
- Provide assistance with other outreach materials as recommended by consultant.
- Provide monthly and quarterly status reports.
- Provide meeting agendas and status updates.

### Task 1.3: Program Implementation

The consultant will lead all Technical Support Program implementation activities in coordination with the I-REN team. The consultant will help I-REN address the areas of greatest need for improved code compliance, in collaboration with local governments and the building industry. The consultant will also provide general support for reach code development and implementation. The consultant will be responsible for each activity listed below:

- Develop and deploy effective survey instruments to gather data and use that data to inform the design of resources to assist building departments and industry professionals.
- Work with local jurisdictions' permit systems and data.
- Work with local jurisdictions, CEC, CALBO, HERS providers, and other key stakeholders on Title 24 Parts 6 and 11 documentation.
- Promote web and mobile permitting tools (e.g., SolarAPP+, CodeCycle) in training sessions and outreach materials.
- Promote use of permit guides or other materials (e.g., checklists, frequently asked questions, e-newsletters) to improve regional best practices for compliance improvement, including:
  - a. Support distribution and placement of guides for public and staff use with local building departments;
  - b. Update guides as necessary based upon feedback from users and participating agencies and businesses;
  - c. Consistent with available budget and I-REN direction, create new guides or other materials for priority areas of compliance improvement.
- Develop training curriculum to address gaps in compliance with current Codes & Standards requirements, in coordination with the Codes & Standards Training & Education Program included in this RFP.
- Assist in developing model reach code ordinances for each Inland Empire climate zone; consistent with available budget and direction from I-REN, tailor ordinances for specific cities based on their building stock, calculate energy, cost and GHG reductions, document cost-effectiveness studies, and prepare adoption, outreach, and implementation materials, in each case using materials developed by the Statewide Codes & Standards Program where available.
- Track and provide information on California and national grant funding opportunities that support improved code compliance.
- Collaborate with local governments, tribes, and special districts and building professionals to design and deliver messaging to the community to promote local leadership in Codes & Standards compliance by highlighting local success stories.
- Collect and analyze metrics for all compliance improvement activities and use the results to suggest changes and improvements.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.

Anticipated deliverables:

- Develop survey instruments.
- Provide training programs in coordination with the Codes & Standards Training & Education Program included in this RFP.
- Develop permit guides.
- Assist with reach code adoption and implementation materials.
- Provide documentation of participant interactions.
- Provide bi-annual reports on compliance improvement efforts, including metrics and recommendations for program improvement.
- Provide monthly and quarterly status reports.
- Provide 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.

Anticipated deliverables:

- Provide program-specific content and edits or updates to content for I-REN regulatory filings.
- Provide program data in alignment with CPUC reporting templates.
- Document and provide metrics, indicators, and other performance measurements.
- Provide analysis of program performance and recommendations for future program improvements.