

2024 Joint Cooperation Memo (JCM)

**San Diego Regional Energy Network (SDREN) and
San Diego Gas & Electric Company (SDG&E)**

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I. OVERVIEW OF COORDINATION APPROACH

The 2024-25 Joint Cooperation Memorandum (JCM) between San Diego Gas and Electric (SDG&E) and the San Diego Regional Energy Network (SDREN) covers energy efficiency (EE) program activity and collaboration in program years 2024-2025.

On January 5, 2024, San Diego Community Power (SDCP), on behalf of SDREN, submitted its Motion for Approval of Energy Efficiency Portfolio Application (SDREN Application).¹ On August 7, 2024, the California Public Utilities Commission (CPUC) issued D.24-08-003, which approved the proposal for a San Diego Regional Energy Network and authorized SDREN as a new EE Portfolio Administrator (PA).² Decision 24-08-003 approved SDREN's Application in its entirety, including its 2024-2027 energy savings goals and funding, as well as its 2024-2031 strategic business plan.³

SDREN's vision is to be a driving force for communities to adopt clean, reliable energy through community-driven solutions that contribute to local and state EE and climate goals. SDREN's overall portfolio goals are to advance decarbonization, provide comprehensive EE services that improve outcomes for underserved and HTR communities, and accelerate the clean energy economy through workforce opportunities, which support attainment of California's ambitious 2030 and 2045 climate goals.

SDREN's proposed EE portfolio is framed by three key principles—to advance environmental equity, catalyze collaboration, and support community-driven change. SDREN's long-term goal is to ensure an equitable transition to a carbon-free building sector in the San Diego region by 2050, seeking higher participation from HTR and underserved communities and reducing their energy burden.

SDREN's approved Business Plan includes a budget of \$124,274,206 to fund EE programs through 2027. SDREN's portfolio empowers San Diegans to conserve energy, reduce stress on the grid, and lower greenhouse gas (GHG) emissions that make the state more resilient and help reach its climate goals. The portfolio is organized by segment and sectors as follows:

- **Segments:** Resource Acquisition, Market Support, Equity, and Codes & Standards
- **Sectors:** Commercial, Cross-cutting (Workforce, Education and Training (WE&T) and Codes and Standards (C&S)), Public, and Residential

The suite of approved programs is designed to address the diverse needs of the San Diego residential, commercial, public, and cross-cutting sectors. Programs include:

Residential Sector:

- **Single Family Program:** Creates a concierge-style home energy advisor service, connecting residents to program information, funding and financing opportunities, and offers rebates and incentives.

¹ Rulemaking ("R.") 13-11-005, Motion of San Diego Community Power on Behalf of the San Diego Regional Energy Network for Approval of Energy Efficiency Portfolio Application (Jan. 5, 2024); see also R.13-11-005, Notice of Availability of Application of San Diego Community Power on Behalf of the San Diego Regional Energy Network for Approval of 2024-2031 Strategic Business Plan, 2024-2027 Portfolio Plan, and Budget (Jan. 5, 2024).

² D.24-08-003, OP 1 (Aug. 7, 2024).

³ Id. at 1, OP 1.

- **Multifamily Program:** Targets multifamily property owners, managers and tenants offering incentives and rebates and customized technical assistance to address facility upgrades that impact both common area measures and renter-specific in-unit utility bill savings.

Commercial Sector:

- **Market Access Program:** Provides performance-based incentives to project developers who deliver peak demand reductions and verified energy savings. This program offers customizable services and financial benefits to underserved businesses and delivers EE and electrification upgrades.
- **Efficient Refrigeration Program:** Offers EE education and no-cost, direct installation of efficient refrigeration equipment to small businesses, supporting energy cost savings and stocking of healthy, fresh, affordable food products.
- **Small- and Medium-Sized Business Energy Coach:** Engages with small- and medium-sized businesses providing technical assistance and facility benchmarking and EE opportunity assessments, supporting access to available funding and financing, and offering measures at no cost.

Public Sector:

- **Tribal Engagement:** Creates a pathway for Tribes and Tribal organizations in the San Diego region to develop and implement energy-related initiatives.
- **Climate Resilience Leadership:** Provides customized guidance and technical services to public agencies for identifying and implementing EE projects.

Cross-Cutting:

- **Workforce Training and Capacity Building:** Focuses on skill development for new and incumbent workers, aiming to build accessible pathways into the green workforce.
- **Energy Pathways Program:** Provides high school students with personalized guidance and access to a diverse network of mentors and training resources to develop students' skills and awareness of green career pathways.
- **Codes and Standards Program:** Supports local government permitting agencies to enhance energy code compliance and embrace advanced energy codes, standards, and policies.

All SDREN programs target HTR and underserved communities, which comprise approximately 56% of the region's population. SDREN is directing 46% of its portfolio to Equity programs, while Market Support programs comprise 34%, Resource Acquisition 14%, and Codes and Standards 6%.

The CPUC's Decision (D.)18-05-041 requires EE PAs with overlapping service areas to submit a joint cooperation memorandum (JCM) to coordinate program activities. Specifically, the directive states on page 97: "We will require the PAs (RENs, Investor-owned Utilities (IOUs), and Community Choice Aggregators (CCAs) to develop a joint cooperation memo to demonstrate how they will avoid or minimize duplication for programs that address a common sector (e.g., residential or commercial) but pursue different activities, pilots that are intended to test new or different delivery models for scalability, and/or programs that otherwise exhibit a high likelihood of overlap or duplication and are not targeted at hard-to-reach customers. For such programs, each PA must explicitly identify and discuss how its activities are complementary and not duplicative of other PAs' planned activities."

SDREN is committed to ensuring cooperation and coordination with San Diego Gas & Electric (SDG&E). SDREN’s proposed portfolio builds on the comprehensive regional sustainability and decarbonization planning in the region, and fills gaps and complements the programs provided by SDG&E. SDREN’s portfolio-level strategies incorporate six delivery methods, one of which is integrating effective coordination and collaboration to identify synergies, reduce costs and complexity, and deliver high-value programs that reflect local priorities and needs. As such, SDG&E and SDREN have a shared interest and commitment to effective coordination.

Both SDREN and SDG&E will communicate and collaborate regularly to ensure their respective programs do not create customer confusion or unnecessary duplication of services. The joint PAs will provide information and referrals to programs across program implementers, including those outside one another’s implementation focus, and will conduct ongoing performance assessments to reduce costs and increase energy savings.

The JCM includes the following information:

- A description of the process SDREN and SDG&E will follow to cooperate with each other with respect to programs for the common sectors of residential, public, commercial, and cross-cutting WE&T and C&S.
- An overview of the programs SDREN and SDG&E intend to offer in common areas, and the current implementer (if known).
- An overview of the coordination approach.
- A description of how SDREN’s anticipated offerings satisfy the CPUC criteria for REN activities (D.12-11-015 and reaffirmed in D.19-12-021).

A. Sector Coordination Meetings

SDREN and SDG&E will organize regularly scheduled sector coordination meetings following the structure described below. These meetings will provide a regular venue to raise any potential challenges, opportunities or issues at the sector or program level.

Figure 1. Sector Coordination Meeting Structure

Frequency	<ul style="list-style-type: none"> • Regular sector coordination meetings will be scheduled monthly. Meetings may be canceled at the discretion of SDREN and SDG&E if there are no agenda items. Meeting frequency will be revisited quarterly to ensure the appropriate frequency. • Meeting scheduling will be informed by each PA’s availability.
Attendees	<ul style="list-style-type: none"> • Attendees will include at least one direct representative from each PA. • Third-party implementers as well as PA policy leads will be included at the discretion of each PA based on meeting agenda content to ensure efficient use of resources. • Meetings will be held virtually. When possible or in conjunction with other in-person activities, PAs will hold in-person or hybrid meetings depending upon PA availability.
Agenda	<ul style="list-style-type: none"> • Sector coordination meetings will follow a structured format. • Topics discussed in sector coordination meetings may include, but are not limited to, program entry, program closure, program status, program changes that may impact how the programs possibly conflict or compete with each other (duplicity), PA staffing, key

	<p>customer contact updates, customer confusion, data requests, successes that are repeatable through best practices, and potential overlap with new market trends or policy changes.</p> <ul style="list-style-type: none"> • Additional topics (walk-in agenda topics) may be included. • A sample of a possible sector coordination meeting agenda template is provided as Appendix E.
Facilitation	<ul style="list-style-type: none"> • SDREN will facilitate sector coordination meetings and will contact SDG&E by e-mail two weeks prior to the meeting to request items for agenda inclusion. • Completed agendas will be sent to SDG&E one week prior to the scheduled meeting date. • SDG&E will distribute draft notes and follow-up items to meeting attendees within three business days of the meeting. SDREN will provide edits to SDG&E within two business days of receiving draft notes. SDG&E will finalize and distribute final notes within two business days of receiving edits from SDREN.

B. Program Updates Outside of Sector Coordination Meetings

Program Changes and Closures

SDREN and SDG&E will discuss program changes and program closures as needed outside of sector coordination meetings to support changes based upon lessons learned once SDREN and SDG&E programs are in the market. Program changes or closures are intended to support program coordination and align efforts where streamlining programs may be advantageous. PAs will follow the program opening and closure procedures as detailed in the *Energy Division Process Checklist to Energy Efficiency Program Administrators for Program Closures and Launches*, and as required in Decision (D.) 21-05-031.

Program changes or closures may also occur for reasons outside of SDG&E or SDREN's control, for example, if a third-party implementer goes bankrupt, or is unable to perform their contractual duties. In such cases, SDREN and SDG&E will communicate these issues to each other outside of sector coordination meetings as needed and may use the optional program change form included in Appendix D⁴. In the event that unexpected program closures occur, SDREN and SDG&E agree to make a good faith effort to notify each other of said closures prior to distributing the CPUC-required webinar notice to the service list. This is a courtesy measure intended to provide the mutual benefit of prudent and efficient portfolio management to both PAs, with overlapping sectors being of primary interest (e.g., not closures within the agriculture or industrial sectors). Confidential and market sensitive information associated with the unexpected closure shall not be disclosed.

SDREN and SDG&E agree to meet in advance of any major filing, which may include, without limitation, SDG&E's off cycle Portfolio Application (expected Q1 2025), the PA midcycle True-up Advice Letters (09/01/25), and the PA 2028-2031 Portfolio Plan (02/13/2026).

New Program Entrants

Pursuant to D.24-08-003, issued on August 7, 2024, SDREN is authorized to offer 10 new programs in the residential, commercial, public and cross-cutting WE&T and C&S sectors. In 2024-2025, SDREN will conduct activities to make these programs available across San Diego County. SDG&E anticipates launching nine new programs in 2024-2025 in the residential and commercial sectors as authorized in its

⁴ Per OP 12 and page 47 of D. 21-05-031, a webinar or workshop shall not be required in the narrow circumstance where a third-party program is ending according to its original contract term length.

2024-2027 Portfolio Plan. SDREN and SDG&E do not anticipate any additional new program entrants during 2024-2025, beyond what is described here; provided, however, that both parties agree to inform the other in advance of any change in program planning during this timeframe.

The sector coordination meetings described in each of the sector strategies will include discussion and coordination for the planned new program entrants described here. The process to be followed for any new program entrants is described in Figure 2. To support coordination and awareness about the program launch progress, SDREN will inform SDG&E about the solicitation progress during the regularly scheduled sector coordination meetings. SDG&E's solicitations schedules are updated on the Proposal Evaluation & Proposal Management Application (PEPMA). SDG&E and SDREN may provide advance notice regarding any expected and upcoming changes to their respective solicitation schedule during sector coordination meetings, to the extent such information is not anti-competitive or market sensitive.

Figure 2. Process for New Program Entrants⁵

	Local and/or Third-Party Programs	SDG&E=Lead Statewide Programs
Meeting 1	Prior to announcing any public webinar and filing the subsequent advice letter, Managing PA will schedule an initial meeting with SD PA lead to provide notification of planned program opening, or will join an existing sector coordination meeting.	
Trigger	Public webinar complete, Advice Letter for new program is approved and (IP) is updated.	
Meeting 2	Managing PA will schedule a meeting with overlapping SD PA leads only.	Managing PA will schedule a meeting with other CA PA leads only.
	Purpose: 1.) Discuss new program(s) in more depth and have discussions on how the programs should and will be coordinated.	
Meeting 3	Managing PA will schedule a meeting to include 3P teams + overlapping SD PA.	Managing PA will schedule a meeting to include 3P teams + all CA PAs.
	Purpose: 1.) Review program in detail with overlapping PAs and 3P implementers. 2.) Resolve any overlapping issues that might be identified in meeting 2. 3.) Determine future coordination meeting schedule, if necessary.	

C. Customer Referrals

Customers eligible for multiple PA programs will be referred to appropriate programs as determined by SDREN and SDG&E. To facilitate the process, SDREN and SDG&E will develop and maintain program points of contact for customer referrals. Customer referrals may be included as topics in sector coordination meetings as determined by SDREN and SDG&E. SDREN and SDG&E are committed to developing and maintaining sector specific processes to allow customers to experience seamless handoffs to SDREN or SDG&E programs, respectively. Customer referral processes will be documented in sector or program-specific customer project and referral tree process flow charts to be maintained as separate documents from this JCM and revised and updated as necessary.

⁵ Decision 21-05-031 at page 46 discusses the process for program openings and closures. Program openings also applies to instances where an IOU portfolio administrator is making a case for a new statewide program elevated from a regional or local program, or where there is a change in the lead administrator for a statewide program.

II. STRATEGIES BY SECTOR

A. Public

SDREN will offer two new public sector programs anticipated to launch in 2025:

- The **Climate Resilience Leadership** (CRL) program is a market support program targeting cities, the County of San Diego, public education agencies, special districts, and tribes, with a focus on agencies serving underserved and HTR communities. The program offers technical assistance, incentives via direct install, outreach and education, and funding and financing support.
- The **Tribal Engagement** (TE) program is an equity program aimed to serve Tribes throughout San Diego County. The TE program will create a pathway for tribes and tribal organizations in the San Diego region to develop, propose, and implement energy-related initiatives to address their unique needs and contribute to sustainability, resilience, and economic development within tribal communities. The program offers technical assistance and outreach and education.

During 2024-2025, SDG&E's public sector offerings include three regional programs administered by SDG&E, and three statewide programs administered by other lead IOUs (PAs). SDG&E's regional public sector offerings include:

- **CAP4ZNE**, a resource acquisition program, intended to provide a concierge approach tailored to local government partners for EE and GHG reductions. The program is no longer accepting new customers (as of July 26, 2024) and the program will be closed as of October 16, 2024, if approved via Advice Letter in 30 days.
- **The SD EnergyLink/Federal Energy Program** is a resource acquisition program that offers cash incentives to SDG&E customers on federal properties and Native American lands to install new, energy efficient technology, equipment, or systems.
- **Retail Offices and Wholesale** is planned to be a resource acquisition program launching early 2025. The program is a downstream commercial retrofit program and will emphasize the property management market, leveraging key players in the region to deliver solutions to retail, office, and wholesale customers.
- **On-Bill Financing** is a market support program that works in conjunction with SDG&E's rebate and incentive programs to offer eligible customers zero-percent financing for qualifying facility improvements.

The statewide public sector offerings administered by other IOUs include the Higher Education Energy Efficiency (HEEP) program, the California Energy Design Assistance (CEDA) mixed fuel program, and the Statewide Water Infrastructure and System Efficiency (WISE) program, as further described below. SDREN and SDG&E do not coordinate on programs for which SDG&E is not the lead Program Administrator. Coordination with statewide programs is described in section F.

- **The HEEP program**, a resource acquisition program, is available to existing higher education facilities owned, operated, or occupied by University of California, California State University, and/or California Community Colleges. HEEP offers technical assistance, no cost energy assessments, and incentives.

- **The CEDA program**, a resource acquisition program, promotes the electrification and decarbonization of new building construction or major renovation offering energy design assistance and incentives.
- **The Statewide WISE Program**, a resource acquisition program, assists water/wastewater pumping customers in identifying EE solutions, securing incentives to help offset installation costs, and providing engineering services.

A total of six programs, consisting of four local programs and three statewide programs, will be offered for the public sector in San Diego County during 2024-2025. Of these, two SDREN programs are anticipated to launch in 2025, while one SDG&E program is anticipated to close in 2024. By the end of 2025, this will result in three regional programs and two statewide programs.

Public Sector Coordination Meetings

SDREN and SDG&E have agreed to hold a monthly 60-minute public sector coordination meeting upon SDREN authorization, with the option to revisit meeting frequency on a quarterly basis. The purpose of the public sector coordination meetings will be to discuss coordination activities for public sector programs. Additional targeted public sector meetings may be warranted and will be coordinated on an ad-hoc basis.

Data Sharing Protocols

D.23-02-002 (Decision Addressing Energy Efficiency Third-Party Processes and Other Issues) dated February 2, 2023, states that the IOUs will share disaggregated data requested by RENs and third-party implementers and/or their authorized agents within ten days after notifying the requestor that the requestor meets the following requirements:

- A current cyber security review by each IOU supplying confidential information.
- A non-disclosure agreement directly with each IOU supplying confidential information.
- The ability to receive secure data transmissions from the IOU.
- A current contract for the program, either as the PA or as prime or subcontractor with a statement of work (SOW) that requires all the confidential data received.

To facilitate and improve data sharing within the ten-day period, SDG&E sought cost recovery to fund data sharing infrastructure, in Advice Letter (AL) 4214-E/3191-G, which is pending approval.

SDREN will determine any necessary customer account or PII data needed for SDREN program implementation and SDREN and/or its implementers will go through SDG&E's Privacy Green Light process for authorization to receive confidential information. SDG&E will provide requested data within the required timeframe (10 days) to support SDREN project timelines. SDG&E will notify SDREN within a reasonable amount of time before the due date if an extension is necessary. SDREN and SDG&E anticipate that data requests and data sharing protocols will be ongoing agenda topics in future sector meetings, particularly once SDREN onboards its third-party implementers and as SDG&E builds out the self-service data sharing platform contemplated in AL 4214-E/3191-G, if approved.

Prior Participation

During 2024-2025, once SDREN launches its public sector programs and begins enrolling customers, SDREN will determine customers' prior participation by submitting a recurring monthly data request to

SDG&E after being approved via SDG&E's Privacy Green Light process. This will aid in understanding what EE programs a customer has participated in or is currently participating in and what measures the customer has received. This process to determine prior participation will be documented in the SDREN-SDG&E Public Sector Coordination Protocols document to be developed and maintained by SDREN and SDG&E in future public sector coordination meetings upon onboarding SDREN's third party implementer(s) and will be revisited quarterly, at a minimum, and will be updated as determined by SDREN and SDG&E.

Customer/Project Referral

The SDREN-SDG&E Public Sector Coordination Protocols document will include a decision tree diagram detailing steps for referrals to clearly break down different paths of action available based on customer eligibility and interest.

SDREN programs aim to leverage SDG&E and statewide program offerings to maximize benefits to customers and prevent overlap by coordinating referrals.

Customer Confusion and Double-Dipping Mitigation Tactics

SDREN and SDG&E outlined the plan below for transparent communication and coordination to prevent duplication of efforts. This transparency between PAs regarding outreach and enrollment will help mitigate customer confusion and avoid double-dipping within the public sector.

- PS-1** SDREN's Climate Resilience Leadership (CRL) program focuses on public sector customers located in or serving underserved/HTR communities. This program is anticipated to be available in 2025 and will coordinate with SDG&E's public sector program(s) to maximize benefits to customers. This program does not duplicate any SDG&E program.
- PS-2** SDREN's Tribal Engagement (TE) program specifically serves tribes and does not duplicate any SDG&E program and has synergies with SDG&E's Federal program which also has a component that targets tribal participants.
- PS-3** SDREN and SDG&E will jointly develop a Public Sector Coordination Protocols document leveraging best practices from other PAs to outline a streamlined decision tree process flow. This document will be finalized upon onboarding SDREN's third-party implementers and will be revisited at least once quarterly by SDREN and SDG&E to incorporate any necessary improvements.
- PS-4** SDREN and SDG&E will maintain ongoing transparency by sharing pipeline/enrolled customers and avoid duplication of efforts. SDREN and SDG&E determined developing and sharing lists on a monthly basis is appropriate. Sharing enrollees or participants will ensure coordination and help maximize customer participation. Data sharing protocols will be leveraged where necessary.
- PS-5** SDREN and SDG&E have agreed to share relevant information about customer targets. This will require some trial-and-error between the PAs and will be an evolving process. The goal of this is to avoid customer confusion and help with marketing efforts.

B. Residential

SDREN will offer two new equity residential sector programs anticipated to launch in 2025:

- The **Multifamily** program serves buildings with two or more units and targets multifamily property owners/managers as well as tenants to address both common area and in-unit upgrades. The program offers technical assistance, customized engagement strategies, a systems tune-up assessment and energy audit as well as EE kits and education opportunities for renters. Participants will receive direct install and rebates of selected measures that can stack with, or meet gaps, of other program offerings.
- The **Single-Family** program provides a home energy advisor to serve HTR and underserved residents to bring personal concierge-style service to connect them to program information and funding and financing opportunities. The program offers personal support connecting residents to programs and relevant program contractors, educational materials including an EE starter kit, and direct install and rebates of selected measures that can stack with, or meet gaps, of other program offerings.

SDG&E's residential sector offerings include six regional programs and three statewide programs, all currently run by SDG&E as the lead IOU. The regional programs include:

- **Residential Zero Net Energy Transformation (RZNET)**, a resource acquisition program serving multifamily and manufactured housing customers and offers access to an energy advisor and selected measures at no cost.
- **Residential Energy Solutions (RES)**, a resource acquisition program serving single-family homeowners and renters offering a no-cost energy assessment and direct install of selected measures.
- **Home Energy & Audits (HEAR) Program**, a resource acquisition program offering behavioral intervention strategies to residential customers to encourage behavior changes that lead to energy savings.
- **Market Access Program (CORE-MAP)**, a resource acquisition program offered both for residential and commercial customers. This program is a modified version of SDG&E's Summer Reliability Market Access Program that allows SDG&E to continue offering MAP participation while SDG&E's completes the Third-Party Market Access Program solicitation, which is set to end mid-2025, at which point Third-Party MAP would take CORE-MAP's place.
- **The Residential Equity Education and Outreach Program aka the Community Education and Outreach (CEO) program** is an equity program serving residential customers in disadvantaged communities (DACs) and HTR communities through in-language community booths, seminars, door hangers, and school outreach seeking to increase customer participation across SDG&E's EE and other demand-side management programs.
- **Customer Home Electrification Readiness Program (CHERP)** is a non-resource program that assists residential customers with the installation of EE measures with a focus on fuel substitution/electrification, renewable energy, energy storage equipment, demand response, and additional electrification opportunities (e.g., EV) as they become available.

The statewide programs include:

- **Golden State Rebates**, a midstream resource acquisition program offering self-service incentives of EE measures at participating retailers and distributors for plug load and appliances for qualifying customers.

- **Comfortably California**, a resource acquisition program that offers resources and incentives to distributors, manufacturers, and retailers for selling specific, high-efficiency HVAC equipment to qualifying customers, and provides no-cost training to contractors and technicians.
- **Statewide Residential HVAC Quality Installation and Quality Maintenance (QIQM)**, an equity program that provides incentives and training resources to HVAC contractors.

By the end of 2025, a total of eight regional programs and three statewide programs will be available for residential customers in San Diego County.

Residential Sector Coordination Meetings

SDREN and SDG&E have agreed to hold a monthly 60-minute residential sector coordination meetings upon SDREN authorization with the option to revisit meeting frequency on a quarterly basis. The purpose of the residential sector coordination meetings will be to discuss coordination activities for residential sector programs. Additional targeted residential sector meetings may be warranted and can be coordinated on an ad-hoc basis.

Data Sharing Protocols

D.23-02-002 states that the IOUs will share disaggregated data requested by RENs and third-party implementers and/or their authorized agents within ten days after notifying the requestor that the requestor meets the following requirements:

- A current cyber security review by each IOU supplying confidential information.
- A non-disclosure agreement directly with each IOU supplying confidential information.
- The ability to receive secure data transmissions from the IOU.
- A current contract for the program, either as the program administrator or as prime or subcontractor with a statement of work that requires all the confidential data received.

To facilitate and improve data sharing within the ten-day period SDG&E sought cost recovery to fund data sharing infrastructure, in AL 4214-E/3191-G, which is pending approval.

SDREN will determine any necessary customer account or PII data needed for SDREN program implementation and SDREN and/or its implementers will go through the SDG&E Privacy Green Light process for authorization to receive confidential information. SDG&E will provide requested data within the required timeframe (10 days) to support SDREN project timelines. SDG&E will notify SDREN within a reasonable amount of time before the due date if an extension is necessary. SDREN and SDG&E anticipate that data requests and data sharing protocols will be ongoing agenda topics in future sector meetings, particularly once SDREN onboards its third-party implementers and as SDG&E builds out the self-service data sharing platform contemplated in AL 4214-E/3191-G, if approved..

Prior Participation

During 2024-2025, once SDREN launches its residential sector programs and begins enrolling customers, SDREN will determine a customer's prior participation by submitting a recurring monthly request to SDG&E after being approved via SDG&E's Privacy Green Light process. This will aid in understanding what EE programs a customer has participated in or is currently participating in and what measures the customer has received. This process to determine prior participation will be documented in the SDREN-SDG&E Residential Sector Coordination Protocols document to be developed and maintained by SDREN and SDG&E in future residential sector coordination meetings upon onboarding SDREN's third-party

implementer(s) and will be revisited quarterly, at a minimum, and will be updated as determined by SDREN and SDG&E.

Customer/Project Referral

The SDREN-SDG&E Residential Sector Coordination Protocols document will include a decision tree diagram detailing steps for referrals to clearly break down the different paths of action available based on customer eligibility and interest.

SDREN programs aim to leverage SDG&E and statewide program offerings to maximize benefits to customers and prevent overlap.

Customer Confusion and Double-Dipping Mitigation Tactics

SDREN and SDG&E have outlined the plan below for transparent communication and coordination to prevent duplication of efforts. This transparency between PAs regarding outreach and enrollment helps mitigate customer confusion and avoids double-dipping within the residential sector.

- RE-1** SDREN's Multifamily program focuses on multifamily buildings of two or more units in underserved and HTR communities. This program is anticipated to be available in 2025 and will coordinate with SDG&E's RZNET program to ensure customers are channeled appropriately. This program will also coordinate with SDG&E's HEAR program to maximize benefits to customers. This program does not duplicate any SDG&E program and has synergies with SDG&E's Multifamily program.
- RE-2** SDREN's Single-Family program focuses on detached, renter or owner-occupied single-family residences in underserved and HTR communities. This program is anticipated to be available in 2025 and will coordinate with SDG&E's RES program to ensure customers are channeled appropriately. This program will also coordinate with SDG&E's HEAR program to maximize benefits to customers. This program does not duplicate any SDG&E program and has synergies with SDG&E's Single-Family program.
- RE-3** SDG&E's CEO program will include SDREN program resources in its outreach.
- RE-4** SDREN and SDG&E will jointly develop a Residential Sector Coordination Protocols document leveraging best practices from other PAs to outline a streamlined Residential Customer Project decision tree process flow. This document will be finalized upon onboarding SDREN's third-party implementers and will be revisited at least once quarterly by SDREN and SDG&E to incorporate any necessary improvements.
- RE-5** SDREN and SDG&E will maintain ongoing transparency to share pipeline/enrolled customers and avoid duplication of efforts. SDREN and SDG&E determined developing and sharing lists monthly is appropriate. Data sharing protocols will be leveraged where necessary. Sharing enrollees or participants will ensure coordination and help maximize customer participation.
- RE-6** SDREN and SDG&E will share information about customer targets. This will require some trial-and-error between the PAs and will be an evolving process. The goal of this is to avoid customer confusion and help with marketing efforts.

C. Cross-Cutting Workforce Education & Training

SDREN will offer two new Workforce Education and Training (WE&T) programs anticipated to launch in 2025:

- The **Energy Pathways Program** is a market support program focused on serving DACs, HTR, historically underserved communities, and Title I high school students to provide access to STEAM educational opportunities. The program will provide wrap-around services and connect high school students to no-cost educational resources, paid internship opportunities, and professional networks. Program participants will access a network of diverse energy/green professionals to act as coaches and mentors, provide guidance, and encourage them to pursue careers in energy.
- The **Workforce Training and Capacity Building program** is a market support program offering workers in HTR and underserved communities with wrap-around services, access to no cost education and certifications, and connection to on-the-job training opportunities. The program will enhance the clean energy workforce in the San Diego region, focusing on skill development for individuals interested in entering the green workforce and incumbent workers. The program will target individuals, employees/employers, boosting skills and employer capacity to work on electrification and decarbonization projects.

During 2024-2025, the region's IOU WE&T offerings include one regional program administered by SDG&E, two WE&T statewide programs administered by other lead IOUs, and one residential sector statewide program administered by SDG&E that may require coordination across sectors.

The regional program includes the **San Diego LEARN Program** which offers free EE and electrification courses that prioritize interactive learning while giving participants access to certifications and resources such as career maps.

The statewide programs are the WE&T Career Connections, WE&T Career Workforce Readiness program – Energize Careers program, and the residential sector HVAC Quality Installation/Quality Maintenance (QI/QM) program listed out in more detail below.

- **WE&T Career Connections – Energy is Everything** is a statewide market support program administered by PG&E and provides standards-aligned, K-12 STEM, energy and environmental-focused curriculum and lesson supplies to educators statewide at no cost. The program also offers high school internships focused on energy and water audits to help students gain relevant industry skills.
- **WE&T Career Workforce Readiness - Energize Careers** is a statewide equity program administered by PG&E that provides services to support disadvantaged workers through technical training, job placement, and wrap-around service support.
- **HVAC Quality Installation/Quality Maintenance (QI/QM)** is a statewide Residential Sector equity program administered by SDG&E that provides incentives to California contractors dedicated to quality installation, maintenance, and advancing energy efficient technologies.

Cross-Cutting Workforce Education & Training Sector Coordination Meetings

SDREN and SDG&E have agreed to hold monthly 60-minute cross-cutting WE&T sector coordination meetings upon SDREN authorization with the option to revisit meeting frequency on a quarterly basis. The purpose of the WE&T sector coordination meetings will be to discuss coordination activities for WE&T sector programs. Additional targeted cross-cutting WE&T sector meetings may be warranted and can be coordinated on an ad-hoc basis.

Data Sharing Protocols

The cross-cutting WE&T program offerings will not involve the use of transfer of customer data between SDREN and SDG&E. If customer data is needed, SDREN and SDG&E will discuss at future cross-cutting WE&T sector coordination meetings.

Prior Participation

SDREN will incorporate into its process a prior participation survey to understand what WE&T programs a customer has participated in or is currently participating in. This will aid in assessing if there is a program overlap with a statewide offering and avoid duplicative efforts. Prior participation in SDG&E's WE&T programs will not prohibit participation in SDREN programs.

Similarly, prior participation in an SDREN WE&T program will not prohibit participation in the San Diego LEARN platform.

Customer/Project Referral

The SDREN-SDG&E Cross-Cutting WE&T Sector Coordination Protocols document will include a decision tree diagram detailing steps for referrals to clearly break down the different paths of action available based on customer eligibility and interest. Specifically, this document will outline paths available for employers who are eligible for both the SDREN Workforce Training & Capacity Building program and SDG&E's QI/QM program.

Customer Confusion and Double-Dipping Mitigation Tactics

SDREN's and SDG&E's WE&T program offerings are distinct and are not anticipated to cause issues related to double-dipping. SDREN and SDG&E outlined the plan below for transparent communication and coordination to avoid customer confusion.

- W1.** SDREN will coordinate with statewide offerings on services, shared partnerships, internships, and/or job opportunities for program participants.
- W2.** SDREN's Workforce Training and Capacity Building program will leverage SDG&E's regional program and/or statewide programs and direct participants to available certifications and resources when applicable.
- W3.** SDREN and SDG&E will jointly develop a Cross-Cutting WE&T Sector Coordination Protocols document leveraging best practices from other PAs to outline a streamlined decision tree process flow. This document will be finalized upon onboarding SDREN's third-party implementers and will be revisited at least once quarterly by SDREN and SDG&E to incorporate any necessary improvements.

D. Commercial

SDREN will offer three new commercial sector programs anticipated to launch in 2025:

- The **Small Medium Business (SMB) Energy Coach** program is an equity program targeting small and medium sized commercial customers with the objective to raise awareness and increase the adoption of EE practices and measures. The program will connect a dedicated energy coach to each participating SMB to educate them on the value of EE and IDSM, provide facility

benchmarking and EE opportunity assessments, support access to funding and financing, offer technical assistance, and install EE measures at no cost to program participants.

- The **Efficient Refrigeration** program is an equity program designed to serve small corner stores/grocers/small businesses by providing EE education and no-cost, direct install of efficient refrigeration equipment. The program will provide technical assistance to identify refrigerators that are eligible for replacement with high efficiency units. This program will also leverage other programs and resources to provide one-on-one education on sourcing California-grown produce and product placement/promotion to encourage customers to make healthy purchases.
- The **Market Access Program (MAP)** is a resource acquisition program targeting SMBs, with a focus on HTR and underserved businesses. The program will provide performance-based incentives to project developers (aggregators) who deliver projects that realize peak demand reductions and verified energy savings. The program will utilize a measure-flexible population normalized metered energy consumption (NMEC) approach to verify savings while paying incentives based on total system benefit (TSB) achieved, encouraging long-life measures that deliver maximum grid benefit.

During 2024-2025, SDG&E's commercial sector programs include ten regional programs administered by SDG&E, and four statewide programs, one administered by SDG&E and the other three by other lead IOUs. The regional programs include eight resource acquisition programs, one market support, and one equity program, as listed in greater detail below.

- The **Business Energy Solutions (BES)** is a resource acquisition direct install program available to public K-12 schools that offers EE upgrades to participants at no cost. The program provides free energy audits and customized recommendations for energy-saving improvements. The program's authorized contractor works with participants to audit the site, identify available upgrades, and install the new equipment. This program is intended to close once the SDREN Climate Resilience Leadership (public sector) program launches serving K-12 school districts.⁶
- **Market Access Program (CORE-MAP)** is a resource acquisition program offered to both residential and commercial customers. This program is a modified version of SDG&E's Summer Reliability Market Access Program that allows SDG&E to continue offering MAP participation while SDG&E completes the Third-Party Market Access Program solicitation, which is set to end mid-2025, at which point Third-Party MAP would take CORE-MAP's place.
- The **Comprehensive Energy Management Solutions (CEMS)** is a resource acquisition program that helps large commercial customers offset the cost of installing new, more efficient equipment with cash incentives for eligible upgrades. This program is expected to close on 12/31/2024, subject to CPUC staff disposition of Advice Letter 4513-E/3340, and SDG&E is replacing the program with four targeted resource acquisition commercial programs, which include:
 - **Retail, Office, and Wholesale (ROW)**
 - **Groceries, Restaurants, and Food Storage (GRFS)**
 - **Lodging (Hotels/Motels)**
 - **Private Institutions and Healthcare (PIH)**

⁶ SDG&E had intended to close the BES Program at the end of 2023 due to the launch of its new Small Business Equity Program (Small Business Saver Program) at the start of 2024. However, due to the early termination of the K-12 Energy Efficiency Program (KEEP), SDG&E plans to keep the program active to serve the K-12 customer base. Instead of issuing a new solicitation for their K-12 EE program, SDG&E will continue to offer the BES program until the launch of the SDREN Climate Resilience Leadership program, which will serve K-12 school districts.

- The Small Business Outreach Program, known as the **Small Business Saver Program**, is an equity program that serves micro and small business (SB) customers located within DACs and/or are considered HTR. The program aims to deliver energy bill savings through customer outreach through local partnerships, and will offer services such as energy education, bill analysis, free direct install measures, and information about other EE and demand response programs.
- The **Non-Residential Behavioral** market support program will maximize savings through personalized, dynamic communications serving small business customers. Medium business customers may be considered. This program aims to modify customer's usage-based and equipment-based behaviors in ways that reduce energy use.

The statewide programs include Comfortably California, a statewide commercial and residential program administered by SDG&E as well as the CA Food Service Instant Rebate Program and the Statewide Midstream Water Heating Program administered by other lead IOUs. Additionally, the CEDA all-electric and mixed fuel statewide program serves not only commercial, but public, multifamily, industrial, and agricultural projects and is administered by another IOU. These programs are listed out in more detail below.

- **Comfortably California** is an upstream and midstream Residential Sector program that offers incentives for heating, ventilation and air conditioning (HVAC) measures.
- The **CA Food Service Instant Rebate Program** offers instant rebates for qualifying equipment installed at non-residential sites.
- The **Statewide Midstream Water Heating Program** helps business owners and building managers purchase high-efficiency commercial water heating products at reduced prices and contracts build lower-cost equipment into their bids.
- The **California Energy Design Assistance Program (CEDA)** is a resource acquisition program, promotes the electrification and decarbonization of new building construction or major renovation offering energy design assistance and incentives.

Once the SDREN Climate Resilience Leadership (public sector) program launches serving K-12 school districts and upon closure of the BES program, a total of nine regional programs and four statewide programs will be available to commercial customers during the JCM period of 2024-2025. A total of three SDREN programs and four SDG&E programs are anticipated to launch in 2025.

Commercial Sector Coordination Meetings

SDREN and SDG&E have agreed to hold monthly 60-minute commercial sector coordination meetings upon SDREN authorization with the option to revisit meeting frequency on a quarterly basis. The purpose of the commercial sector coordination meetings will be to discuss coordination activities for commercial sector programs. Additional targeted commercial sector coordination meetings may be warranted and can be coordinated on an ad-hoc basis.

Data Sharing Protocols

D.23-02-002 states that the IOUs will share disaggregated data requested by RENs and third-party implementers and/or their authorized agents within ten days after notifying the requestor that the requestor meets the following requirements:

- A current cyber security review by each IOU supplying confidential information.
- A non-disclosure agreement directly with each IOU supplying confidential information.
- The ability to receive secure data transmissions from the IOU.

- A current contract for the program, either as the program administrator or as prime or subcontractor with a statement of work that requires all the confidential data received.

To facilitate and improve data sharing within the ten-day period SDG&E sought cost recovery to fund data sharing infrastructure, in AL 4214-E/3191-G, which is pending approval.

SDREN will determine any necessary customer account or PII data needed for SDREN program implementation and SDREN and/or its implementers will go through the SDG&E Privacy Green Light process for authorization to receive confidential information. SDG&E will provide requested data within the required timeframe (10 days) to support SDREN project timelines. SDG&E will notify SDREN within a reasonable amount of time before the due date if an extension is necessary. SDREN and SDG&E anticipate that data requests and data sharing protocols will be ongoing agenda topics in future sector meetings, particularly once SDREN onboards its third-party implementers and as SDG&E builds out the self-service data sharing platform contemplated in AL 4214-E/3191-G, if approved.

Prior Participation

During 2024-2025, once SDREN launches its commercial sector programs and begins enrolling customers, SDREN will determine a customer's prior participation by submitting a recurring monthly data request to SDG&E after being approved via SDG&E's Privacy Green Light process. This will aid in understanding what EE programs a customer has participated in or is currently participating in and what measures the customer has received. This process to determine prior participation will be documented in the SDREN-SDG&E Commercial Sector Coordination Protocols document to be developed and maintained by SDREN and SDG&E in future commercial sector coordination meetings upon onboarding SDREN's third-party implementer(s) and will be revisited quarterly, at a minimum, and will be updated as determined by SDREN and SDG&E.

Customer/Project Referral

The SDREN-SDG&E Commercial Sector Coordination Protocols document will include a decision tree diagram to clearly break down the different paths of action available based on customer eligibility and interest.

Customer Confusion and Double-Dipping Mitigation Tactics

SDREN and SDG&E outlined the plan below for transparent communication and coordination to prevent duplication of efforts. This transparency between PAs regarding outreach and enrollment will help mitigate customer confusion and avoid double-dipping within the commercial sector. Additional mitigation tactics may be identified in the monthly commercial sector meetings.

- CS-1** SDREN and SDG&E will jointly develop a Commercial Sector Coordination Protocols document to outline a streamlined decision tree process flow. This document will be finalized upon onboarding SDREN's third-party implementers and will be revisited at least once quarterly by SDREN and SDG&E to incorporate any necessary improvements.
- CS-2** SDREN's SMB Energy Coach program will refer program participants to the statewide Comfortably California program and the CA Food Service Instant Rebate Program, as applicable.

- CS-3** SDREN’s Efficient Refrigeration program serving small corner stores/grocers/small businesses will coordinate with SDG&E’s forthcoming resource acquisition program targeting grocery stores, restaurants and food storage facilities.
- CS-4** SDG&E’s Small Business Saver Program will provide customers information on available EE programs including information about SDREN programs.
- CS-5** SDREN and SDG&E will maintain ongoing transparency to share pipeline/enrolled customers and avoid duplication of efforts, discuss coordination, and help maximize participation. SDREN and SDG&E determined developing and sharing lists monthly is appropriate. Data sharing protocols will be leveraged as necessary.
- CS-6** SDREN and SDG&E will share information about customer targets with each other. This will require some trial-and-error between the PAs and will be an evolving process. The goal of this is to avoid customer confusion and help with marketing a joint customer messaging strategy.

E. Cross-Cutting Codes and Standards

SDREN will offer one new C&S program anticipated to launch in 2025. The Codes and Standards program is designed to improve compliance with existing codes and standards, help local governments develop ordinances that exceed statewide minimum requirements and coordinate with other programs and entities to support the state’s policy goals. The program will prioritize smaller and rural permitting agencies that face more capacity and resource constraints than their larger counterparts to ensure they can access tools and knowledge to overcome these constraints. The program offers technical assistance, education and training, tools and resources through an energy code coach which includes conducting a needs assessment to identify C&S compliance gaps and barriers.

During 2024-2025, SDG&E’s C&S program offerings include three regional subprograms and three statewide subprograms, led by another lead IOU, including:

- The **Compliance Enhancement Subprogram** which assists with improving compliance for both the Building Energy Code (Title 24, Part 6), and California’s Appliance Standards (Title 20). The program targets markets throughout the compliance supply chain by providing needs-based research, strategic planning, tools, training, resources, videos, and outreach to all market actors.
- The **Reach Codes Subprogram** that focuses primarily on developing and/or supporting the development and implementation of reach codes or locally adopted ordinances that exceed statewide minimum requirements and CALGreen Codes (Title 24 – Part 11). Reach Codes and CALGreen Code (Tier 1/Tier 2) are typically codes adopted by local governments.
- The **Planning & Coordination Subprogram** works with the California Energy Commission (CEC), CPUC, key market actors, emerging technologies, and voluntary programs to create a strategic approach for the development of key measures and technologies in support of building EE, electrification, ZNE, GHG reduction, alternative fuel vehicles, grid flexibility and sustainability, indoor air quality, and equity. This subprogram also works with other programs and market actors to improve code compliance by delivering education, conducting outreach, and soliciting additional input on future code development and code compliance proposals from impacted industries.
- The **Statewide National Appliance Standards Advocacy, Statewide Title 20 Appliance Standards Advocacy, and Statewide Title 24 Building Codes Advocacy** subprograms reduce building and appliance energy use and associated GHG emissions through the advancement of test procedures, building codes, and appliance standards. These advocacy Subprograms achieve

energy and demand savings goals on behalf of ratepayers by influencing continuous updates in EE regulations by working directly with the CEC, U.S. Dept. of Energy (DOE), U.S. Environmental Protection Agency (EPA), and other significant code-setting bodies.

Cross-Cutting Codes and Standards Coordination Meetings

SDREN and SDG&E have agreed to hold monthly 60-minute C&S coordination meetings upon SDREN authorization with the option to revisit meeting frequency on a quarterly basis. The purpose of the C&S coordination meetings will be to discuss coordination activities for the C&S programs. Additional targeted C&S meetings may be warranted and will be coordinated on an ad-hoc basis.

Data Sharing Protocols

The cross-cutting C&S program offerings will not involve the use of customer data transfers between SDREN and SDG&E. If such needs arise, SDREN and SDG&E will discuss at future sector C&S coordination meetings.

Prior Participation

SDREN will incorporate into its process a prior participation survey to understand what C&S programs customers have participated in or are currently participating in. This will aid in avoiding duplicative efforts. Prior participation in SDG&E's C&S programs will not prohibit participation in SDREN programs. Similarly, prior participation in an SDREN C&S program will not prohibit participation in the SDG&E programs.

Customer/Project Referral

During the C&S coordination meetings, SDREN and SDG&E will work to ensure a well-coordinated and comprehensive set of C&S program offerings, policy strategies and compliance solutions. As part of this effort, SDREN and SDG&E will also work together on marketing and outreach efforts and customer referral strategies. Both the proposed SDREN C&S program and the SDG&E local C&S program will strive to offer a comprehensive set of strategies to effectively address current and anticipated C&S policy drivers and increase compliance support for permitting agencies and permit applicants. The SDREN-SDG&E Cross-cutting C&S Sector Coordination Protocols document will discuss a collaborative process in working together to achieve common C&S goals at the state and local level, including supporting customer referrals to the appropriate programs.

Customer Confusion and Double-Dipping Mitigation Tactics

SDREN's and SDG&E's C&S program offerings are distinct and are not anticipated to cause issues related to double-dipping. However, SDREN and SDG&E outlined the plan below for transparent communication and coordination.

C-1 SDREN will coordinate with statewide offerings on services, tools, and resources for program participants.

C-2 SDREN and SDG&E will share enrollees and participant information to ensure that the programs are coordinating and to help maximize customer participation.

C-3 SDREN and SDG&E will jointly develop a Cross-cutting C&S Sector Coordination Protocols document leveraging best practices from other PAs to outline a streamlined decision tree process flow. This document will be finalized upon onboarding SDREN's third-party

implementers and will be revisited at least quarterly by SDREN and SDG&E to incorporate any necessary improvements.

F. Statewide Programs

As outlined in each of the specific sector sections above, there are a total of 12 statewide programs across public, residential, commercial, cross-cutting WE&T and C&S sectors, of which three are led by SDG&E.⁷ As statewide programs have a footprint beyond the SDREN and SDG&E territories, it is important for SDREN and SDG&E to coordinate not just with each other, but with all statewide programs, inclusive of those administered by other PAs. As described in applicable sector specific sections, SDREN programs aim to leverage SDG&E and statewide program offerings to maximize benefits to customers and prevent overlap and refer customers to statewide programs where appropriate.

Statewide Programs Meetings

SDREN and SDG&E will conduct meetings with statewide PA leads as necessary to ensure that lessons learned are shared and that duplicative efforts are avoided. Upon new program launches, SDREN will reach out to statewide PA leads to schedule a meeting and introduce their program offerings and clarify any necessary coordination activities. Each PA will determine whether ongoing meetings are necessary or if they can be called on an ad-hoc basis.

Data Sharing Protocols

During the initial coordination meeting, SDREN and SDG&E will determine and agree upon what, if any, data sharing protocols are necessary.

Prior Participation

SDREN and SDG&E will incorporate into their processes a structure to understand what EE programs a customer has participated in or is currently participating in. This will aid in assessing if there is program overlap and avoid duplicative efforts.

Presenting Available Programs

SDREN intends to present available statewide programs based on customer needs and applicability to each customer.

Customer/Project Referral

As described in the Customer Referral section above, a customer referral process will be documented in sector or program specific customer project and referral tree process flows. SDREN and SDG&E will include statewide program referral processes, where applicable, for each sector.

Customer Confusion and Double-Dipping Mitigation Tactics

Through the statewide coordination meetings, SDREN and SDG&E will discuss coordination and customer targeting to mitigate customer confusion and double dipping.

⁷ SDG&E submitted AL 4494-E/3332-G, which requests authorization to change the statewide lead program administrator for two programs for which SDG&E's is the statewide lead. The AL is pending disposition.

APPENDIX A: Regulatory Guidance

D.18-05-041 requires EE PAs with overlapping service areas to submit a JCM to coordinate program activities. The dicta of the Decision states that JCMs “...must demonstrate how they [PAs] will avoid or minimize duplication for programs that address a common sector (e.g., residential or commercial) but pursue different activities, pilots that are intended to test new or different delivery models for scalability, and/or programs that otherwise exhibit a high likelihood of overlap or duplication and are not targeted at hard-to-reach customers. For such programs, each PA must explicitly identify and discuss how its activities are complementary and not duplicative of other PAs’ planned activities.”⁸

In D.23-06-055 the CPUC established additional JCM requirements. Ordering Paragraph (OP) 35 “...supersedes Decision (D.) 18-05-041 and D.21-05-031 with respect to the timing and submission of Joint Cooperation Memoranda (JCM). Portfolio administrators must submit JCMs every two years, within 60 days after Commission approval of the last of each JCM’s PA’s true-up advice letters and mid-cycle advice letters (as applicable), to the California Energy Data and Reporting System, with notice to the service list of Rulemaking 13-11-005 or a successor proceeding.” Ordering Paragraph 3 of Decision 24-08-003 (Decision Addressing Motion for Authorization of San Diego Regional Energy Network) states, “San Diego Regional Energy Network must submit a joint cooperation memo with San Diego Gas & Electric Company to the California Energy Data and Reporting System, with notice to the service list, within 90 days of the issuance date of this decision.” D. 24-08-003 was issued on August 7, 2024; accordingly, this Joint Cooperation Memo was submitted by November 5, 2024. As the lead PA for SDREN, San Diego Community Power developed this document in partnership with SDG&E.

In addition to the change in submission cadence, OP 34 in D.23-06-055 also made additional requirements for RENs. “Bay Area Regional Energy Network, Southern California Regional Energy Network, Tri-County Regional Energy Network, and Rural Regional Energy Network shall, for programs that only meet the criterion of serving hard-to-reach customers, include in their Joint Cooperation Memoranda a description of how they will target (i.e., market and conduct outreach to) and to primarily serve hard-to-reach customers or specific hard-to-reach customer segments.”⁹

Finally, OP 33 of D.23-06-055 states “Investor-owned utility (IOU) portfolio administrators must convey information to third-party bidders during the solicitation process, for buildings that have a potential to be served by both IOUs’ third-party implementers and regional energy networks (RENs), about RENs’ efforts to identify hard-to-reach customers or buildings to target for marketing of REN programs.”¹⁰

⁸ D.18-05-041 at 97.

⁹ D.23-06-055 at 137.

¹⁰ *Id.* at 130.

APPENDIX B: SD JCM Program Matrix

[illegible]

APPENDIX C: SDREN Program Descriptions & Compliance with REN Criteria

Residential Sector:

SDREN-02-RES-SFM

Single Family Program

Creates a concierge-style home energy advisor service, connecting residents to program information, funding and financing opportunities, and offers rebates and incentives.

Compliance with REN Criteria:

- 1) activities that investor-owned utility (IOU) or community choice aggregator (CCA) program administrators cannot or do not intend to undertake
- (3) activities serving hard-to-reach markets, whether or not there is another utility or CCA program that may overlap.

SDREN-01-RES-MFM

Multifamily Program

Targets multifamily property owners, managers and tenants offering incentives and rebates and customized technical assistance to address facility upgrades that impact both common area measures and renter-specific in-unit utility bill savings.

Compliance with REN Criteria:

- 1) activities that investor-owned utility (IOU) or community choice aggregator (CCA) program administrators cannot or do not intend to undertake
- (3) activities serving hard-to-reach markets, whether or not there is another utility or CCA program that may overlap.

Commercial Sector:

SDREN-03-COM-MAP

Market Access Program

Provides performance-based incentives to project developers who deliver peak demand reductions and verified energy savings. This program offers customizable services and financial benefits to underserved businesses and delivers EE and electrification upgrades.

Compliance with REN Criteria:

- 1) activities that investor-owned utility (IOU) or community choice aggregator (CCA) program administrators cannot or do not intend to undertake
- (3) activities serving hard-to-reach markets, whether or not there is another utility or CCA program that may overlap.

SDREN-02-COM-ERF

Efficient Refrigeration Program

Offers EE education and no-cost, direct installation of efficient refrigeration equipment to small businesses, supporting energy cost savings and stocking of healthy, fresh, affordable food products.

Compliance with REN Criteria:

- 1) activities that investor-owned utility (IOU) or community choice aggregator (CCA) program administrators cannot or do not intend to undertake

(3) activities serving hard-to-reach markets, whether or not there is another utility or CCA program that may overlap.

SDREN-01-COM-SMB

Small- and Medium-Sized Business Energy Coach

Engages with small- and medium-sized businesses providing technical assistance and facility benchmarking and EE opportunity assessments, supporting access to available funding and financing, and offering measures at no cost.

Compliance with REN Criteria:

- 1) activities that investor-owned utility (IOU) or community choice aggregator (CCA) program administrators cannot or do not intend to undertake
- (3) activities serving hard-to-reach markets, whether or not there is another utility or CCA program that may overlap.

Public Sector:

SDREN-02-PUB-TRE

Tribal Engagement

Creates a pathway for Tribes and Tribal organizations in the San Diego region to develop and implement energy-related initiatives.

Compliance with REN Criteria:

- 1) activities that investor-owned utility (IOU) or community choice aggregator (CCA) program administrators cannot or do not intend to undertake

SDREN-01-PUB-CRL

Climate Resilience Leadership

Provides customized guidance and technical services to public agencies for identifying and implementing EE projects.

Compliance with REN Criteria:

- 1) activities that investor-owned utility (IOU) or community choice aggregator (CCA) program administrators cannot or do not intend to undertake

Cross-Cutting:

SDREN-02-WET-BRC

Workforce Training and Capacity Building

Focuses on skill development for new and incumbent workers, aiming to build accessible pathways into the green workforce.

Compliance with REN Criteria:

- 1) activities that investor-owned utility (IOU) or community choice aggregator (CCA) program administrators cannot or do not intend to undertake
- 2) pilot activities where there is no current utility or CCA program offering, and where there is potential for scalability to a broader geographic reach, if successful.

SDREN-01-WET-EPP

Energy Pathways Program

Provides high school students with personalized guidance and access to a diverse network of mentors and training resources to develop students' skills and awareness of green career pathways.

Compliance with REN Criteria:

1) activities that investor-owned utility (IOU) or community choice aggregator (CCA) program administrators cannot or do not intend to undertake

SDREN-01-CS-CSS

Codes and Standards Program

Supports local government permitting agencies to enhance energy code compliance and embrace advanced energy codes, standards, and policies.

Compliance with REN Criteria:

1) activities that investor-owned utility (IOU) or community choice aggregator (CCA) program administrators cannot or do not intend to undertake

2) pilot activities where there is no current utility or CCA program offering, and where there is potential for scalability to a broader geographic reach, if successful.

APPENDIX D: Optional Program Change Form Template

PA	
Sector	
Date	
Program	
Summary of Program Change	

Additional Notes:

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APPENDIX E: Sample Sector Coordination Meeting Agenda/Notes Template

Sector				
Meeting Date				
Meeting Location				
PAs		SDREN		SDG&E
Attendees				

Agenda:

Notes:

Action Items:

1.

SD JCM

2.

3.

4.

5.