2025-2026 Central Coast Joint Cooperation Memorandum

Central California Rural Regional Energy Network (CCR REN)

Tri-County Regional Energy Network (3C-REN)

Pacific Gas and Electric Company (PG&E)

INTRODUCTION

This is the first Joint Cooperation Memo (JCM) between Central California Rural Regional Energy Network (CCR REN), Tri-County Regional Energy Network (3C-REN), and Pacific Gas and Electric Company (PG&E), and covers program years 2025-26. The Portfolio Administrators (PAs) have committed to collaborating, coordinating and ensuring the best service to joint ratepayers. This JCM provides an overview of the programs offered by each PA in overlapping territory; a discussion of potential program overlaps by sector, and details about collaboration methods that can be used to mitigate customer confusion, streamline customer handoffs, and avoid duplication. The identification of the REN criteria for each CCR REN program, as directed by the California Public Utilities Commission (CPUC) in Decision (D.) 12-11-015 and reaffirmed in D.19-12-021, is provided. Finally, in the Appendix, a segment table showing each PA's program and budget by year is included. Note that while this JCM covers energy efficiency program activity and collaboration for program years 2025 and 2026, the aforementioned segment table provides the budget for years 2024-2026.

GEOGRAPHIC OVERLAP

CCR REN is comprised of local government and non-profit organizations that provide energy efficiency programs to three regions of California: the Central Coast, the Eastern Sierra, and the San Joaquin Valley. The combined CCR REN service territory has a population of 5.4 million people, representing approximately 14% of California's total population that covers approximately 50,000 square miles and serves 14 counties. As a result of the large geographic territory with different shared PAs and a service territory that is not contiguous, the CPUC in D. 23-06-055 directed CCR REN to submit two separate JCMs, broken down by geographic regions.[1] This is the Central Coast JCM and includes the jurisdictions within the counties of San Luis Obispo, Monterey, San Benito, and Santa Cruz only.

The 3C-REN offers programs in the counties of Ventura, Santa Barbara and San Luis Obispo and therefore only overlaps with CCR REN in San Luis Obispo County. PG&E[2] service territory includes both Monterey, San Benito, Santa Cruz, and San Luis Obispo counties.

BACKGROUND/REGULATORY GUIDANCE

The CPUC directed in D. 18-05-041 that Energy Efficiency (EE) PAs with overlapping service areas submit a JCM to coordinate program activities. Specifically, the directive states:

> *We will require the PAs (RENs, IOUs, and CCA) 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*

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[1] D.23-06-055 p 24; Ordering Paragraph #8, p 121. CCR REN was also directed to prepare a separate JCM, referred to as the San Juaquin Valley and High Sierra JCM, that covers the overlapping territory in the jurisdictions within the San Joaquin Valley (Fresno, Kern, Kings, Madera, Merced, San Juaquin, Stanislaus and Tulare counties) and High Sierra (the counties of Inyo and Mono) regions. The Portfolio Administrators for this JCM are Southern California Regional Energy Network (SoCalREN), Pacific Gas and Electric Company (PG&E), Southern California Edison (SCE) and Southern California Gas Company (SoCalGas).

[2] This JCM only relates to the overlapping PG&E territory in these counties. The above-mentioned San Juaquin Valley and High Sierra JCM covers overlapping PG&E territory in those regions.

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.[3]

CPUC D.23-06-055 further establishes additional requirements for PAs submitting JCMs:

This decision supersedes 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 portfolio administrator'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 (R.) 13-11-005 or a successor proceeding.[4]

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.[5]

D.23-06-055 also directed the IOU PAs to "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."[6] Specific to the newly approved RuralREN, in this Decision the Commission directed that three separate JCMs are required due to the geographic diversity and overlap with PAs: Central Coast - JCM with PG&E, San Joaquin Valley and High Sierra - PG&E, SCE, SoCalREN and SoCal Gas, and North Coast – RCEA and PG&E.[7]

D. 24-09-031, the Rural Regional Energy Network, approved in D.23-06-055, was split into two RENs based on geographic territories: the Northern California Rural Regional Energy Network, and the Central California Rural Regional Energy Network (CCR REN), with Southern California Edison ordered to serve as the fiscal agent for CCR REN.[8] While the Commission approved this REN breakdown, the previously approved program portfolio remained the same. The Commission also continued to require the JCMs discussed in D.19-12-021 and D.23-06-055[9].

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[3] D.18-05-041 at p.97

[4] D.23-06-055, p. 130, Ordering Paragraph 35

[5] D.23-06-055 at p.130, OP 34.

[6] D.23-06-055 at p.130, OP 33.

[7] D.23-06-055, at p. 121, OP 8.

[8] D.24-09-031, p. 43, Conclusion of Law #17.

[9] *Id.*

Finally, in Resolution E-5400[10], the CPUC approved the revised 2024-27 Energy Efficiency Portfolio Business Plans for Northern California Rural Regional Energy Network (NREN) and Central California Rural Regional Energy Network (CCR REN). In Resolution E-5400, the Commission also ordered the following:

Ordering Paragraph 3: If CCR REN's and NREN's programs overlap with ESA, each shall update and modify its portfolio in the mid-cycle advice letters if there are changes or modifications to their programs related to findings of overlap with ESA. They shall include a monitoring plan for overlap with ESA in their mid-cycle advice letters and shall report on their monitoring efforts in their annual reports.

Ordering Paragraph 4: Joint Cooperation Memos between CCR REN and NREN and the IOUs must include a discussion of the referral process for ESA-eligible customers.

Accordingly, this JCM is between CCR REN, 3C-REN, and PG&E, and is referred to as the Central California JCM. All of the CCR REN programs subject to this JCM are only offered in the counties of San Luis Obispo, Monterey, San Benito, and Santa Cruz counties.

GENERAL PORTFOLIO COORDINATION

CCR REN, 3C-REN, and PG&E (hereinafter referred to as the "Joint PAs") will work together to establish methods of communication and collaboration. The Joint PAs will collaborate to ensure that their respective overlapping regional programs do not result in unnecessary duplication or cause customer confusion. The Joint PAs can derive additional value by providing information and referrals to programs across all program implementers, including those outside each other's implementation focus.

The majority of the coordination activities take place at the sector level. However, on the portfolio level, the Joint PAs will coordinate as needed by email and through regular meetings to provide updates on portfolio or program changes. For coordination with PG&E's ESA program, an electronic ESA Referral Log will also be exchanged monthly. The ESA coordination and referral process are described in detail in Residential Coordination Section below.

DATA SHARING PROTOCOL

PG&E has data governance and protection obligations for sharing any customer data. Before PG&E shares data that it is authorized to share by applicable law and/or tariff for double-dip check purposes or to support a CCR REN program, the following minimum data security and privacy protocols need to be completed:

- The party seeking customer data has a contract with the County of San Luis Obispo on behalf of CCR REN or with the lead contractor for a CCR REN program that includes acceptable privacy and data protection and liability provisions.
- The party seeking data has executed a Non-disclosure Agreement (NDA) with PG&E.

[10]CPUC Energy Division Resolution E-5400 dated August 28, 2025, Revised 2024-27 energy efficiency portfolio business plans for Northern California Rural Regional Energy Network and Central California Rural Regional Energy Network

- The party seeking data has completed PG&E’s Third-Party Security Review (TSR) and TSR renewals, as required by PG&E.

In D. 23-02-002 the Commission ordered all IOUs to share certain categories of 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 sub-contractor with a statement of work that requires all the confidential data received.[11]

The County of San Luis Obispo, on behalf of CCR REN, will provide PG&E with a quarterly financial forecast update and quarterly Total System Benefit[12] (TSB) forecast update. The quarterly financial forecast update is the financial payments The County of San Luis Obispo anticipates from PG&E for CCR REN energy efficiency programs. The County of San Luis Obispo will ensure that any changes in the CCR REN program delivery are reflected in these forecast updates.

This section is not applicable to 3C-REN as they do not possess the relevant data.

[11] D.23-02-0023 at p. 63-64, OP 19.

[12] TSB (Total System Benefit) is the sum of the benefit that program measures provide to the electric and natural gas systems.

OVERLAPPING SECTORS BY PORTFOLIO ADMINISTRATOR (PA)

Table 1: Areas of Potential Overlap, by Sector

Sector	3C-REN	CCR REN	PG&E
Residential	• Single-Family Home Energy Savings (TCR-Res-003) • Multi-Family Home Energy Savings (TCR-Res-002)	Residential Equity Program (CCR-RES-001) • Green House Calls (in-home and virtual) • Virtual Energy SurveysAudits	• PG&E Home Intel Program (NMEC) • PG&E ESA Program • Energy Savings Assistance – Northern Multi-Family Whole Building • California Energy-Smart Homes Program (CESHP) • PG&E On-Bill Financing (Non-residential and multi-family only) • GoGreen Financing[13] EmPower My Home - Residential Equity Electrification Pilot

[13] Go Green financing is a program offered by the State of California, supported by the IOUs available to all qualifying residential and small business customers. The program is operated by the California Alternative Energy and Advanced Transportation Financing Authority *(CAEATFA).* https://www.gogreenfinancing.com/

Sector	3C-REN	CCR REN	PG&E
Commercial	Commercial Marketplace (TCR-Com-001)	Commercial Resource Acquisition Program (CCR-COM-001)	• Commercial Calculated Incentives Program (PGE21011) • Commercial Deemed Incentives Program (PGE21012) • Commercial Energy Advisor Program (PGE21014) • NetOne (PGE_Com_003) • Advanced Energy Program for High Tech & Biotech (PGE_Com_004) • Healthcare Energy Fitness Initiative (PGE_Com_005) • Measured Savings for Summer Reliability (PGE_Com_006) • Commercial Strategic Energy Management (PGE_Com_009) • Simplified Savings Micro-Small Business Program (PGE_Com_SmallBiz) • California Energy Design Assistance All-Electric (PGE_SW_NC_NonRes_electric) • California Energy Design Assistance Mixed Fuel (PGE_SW_NC_NonRes_mixed)
Agricultural	Agriculture Technical Assistance (TCR-AG-001)	None	• Agricultural Deemed Incentives Program (PGE21032) • Agricultural Energy Advisor Program (PGE21034) • Agricultural Energy Savings Action Plan (AESAP) Program (PGE_Ag_001)
Public	Energy Assurance Services (TCR-CC-001	Public Equity Program (CCR-PUB-001)	• Government and K-12 (GK-12) Comprehensive Program (PGE_Pub_009) • Statewide State of California: Energy Strategy and Support Program (PGE_SW_IP_Gov)

Sector	3C-REN	CCR REN	PG&E
Cross-cutting: WE&T	Building Performance Training (TCR-WET-001)	Workforce, Education and Training Equity Program (CCR-WET-001) • Climate Careers	• WE&T Integrated Energy Education and Training (IEET) (PGE21071) • WE&T Career Workforce Readiness (PGE_SW_WET_Work) • WET Career Connections (PGE_SW_WET_CC)
Cross-cutting: C&S	Energy Code Connect (TCR-CS-001)	Codes & Standards Program (CCR-C&S-001)	• Compliance Improvement • Reach Codes
Cross-cutting: Finance	N/A	Finance Equity Program (CCR-FIN-001)	• PG&E On-Bill Financing (PGE_OBFAP) • GoGreen Financing[14]
Cross-cutting: Other	Energy Assurance Services (TCR-CC-001)	N/A	• N/A
Statewide			SW Programs led by PG&E are listed in their appropriate sector. SW Programs not led by PG&E: • Statewide Commercial Midstream Water Heating • Statewide Upstream & Midstream Heating, • Ventilation and Air Conditioning Program • Statewide Foodservice Instant Rebates Program • Statewide Plug Load Appliance Program • Lincus Statewide Water Infrastructure & System Efficiency (SW WISETM) Program

[14] ibid

Sector	3C-REN	CCR REN	PG&E
			• Statewide Home Energy Score (HES)

RESIDENTIAL SECTOR

CCR-REN: Residential Equity Program (CCR-RES-001)

Implementer: Rising Sun Center for Opportunity

The Residential Equity program connects rural residential communities to energy efficiency opportunities through targeted outreach, education, and technical assistance focusing on equity-targeted hard-to-reach, disadvantaged, and low-income customer groups, including agriculture, hospitality, healthcare workers, and retirees who often face very high energy burdens in rural areas. The program aids rural and hard-to-reach communities in better understanding the concepts of energy conservation, energy efficiency, and demand response; connects customers to the opportunities for energy savings that might exist in their homes; and guides customers to other CCR REN programs as well as external programs and resources to support the implementation of energy efficiency and demand response.

The Residential Equity program will conduct in-home energy audits by Climate Careers Energy Advisors; install simple, low cost energy efficiency measures by Climate Careers Energy Advisors, and offer energy efficiency kits with simple energy efficiency measures for self-installation by residents. All of these services and EE measures are provided to customers at no-cost to the customer. Additionally, program participants will be provided with an energy report that maps out actionable steps to deploy energy efficiency measures, suggest behavior changes and connect customers with other supporting programs, incentives, and financing offered by IOUs, third parties, and RENs in the shared territory. A small, innovative virtual home survey platform that provides customized recommendations and models the impact of zero net energy and zero net carbon strategies will be tested in a limited area of the Central Coast region. This tool will not require residents to have access to their energy usage data and instead relies on creating a virtual model of each home based on the building characteristics. The energy survey and virtua model will drive interest in the energy efficiency kit offering as well as other programs supporting zero net energy and zero net carbon strategies. The tool is intended to be used for outreach at community eventswhere obtaining energy usage data in real time would not feasible.

Table 1: Compliance with REN Program Criteria: Residential Equity Program

REN Criteria	CCR-RES-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	CCR REN's Residential Sector programs target disadvantaged, underserved and hard-to-reach residential customers living in rural areas. Other PA programs, while open to these rural, equity customers, do not focus on them or provide services tailored to their unique needs to address the barriers to energy efficiency that they face.

2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	NA
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	CCR REN's Residential program will operate exclusively in hard-to-reach, disadvantaged and underserved communities.

Marketing and Outreach to HTR Residential Customers:

CCR REN's Residential Equity program targets customers living in hard-to-reach rural areas, and/or disadvantaged and underserved communities which comprise the majority of CCR REN's service area. Specific marketing and outreach tactics will include:

- Program staff attending community events, handing out program information and signing up customers to receive program services
- Placing ads in local print media such as newspapers and bulletins
- Distributing flyers and collateral through local governments and merchants
- Messaging via local social media and other online outlets
- Grassroots outreach with door-to-door canvassing

3C-REN Residential Programs

3C-REN implements two separate residential sector programs: one that serves single-family homes, and one that serves multifamily properties. Both programs are designed to target Hard to Reach (HTR) customers and provide rebates for energy efficiency upgrades that achieve energy and greenhouse gas (GHG) savings.

3C-REN: Multifamily Home Energy Savings (TCR-Res-002)

Implementer: AEA

3C-REN's multifamily program delivers energy savings targeted to Hard to Reach (HTR) multifamily properties in the 3C-REN service territory. The program includes incentives to be paid to property owners/managers of multifamily properties with five or more units. This whole building program utilizes contractors to complete retrofits as well as site assessments, technical assistance, and a rebate structure based on the number of units in the complex. To qualify for the rebates, there are minimum average GHG savings per apartment requirements that are calculated based on energy upgrade plans. The incentive structure also includes enhanced incentives for underserved properties and adders for higher performance measures, such as heat pumps.

Table 2: Compliance with REN Program Criteria: Residential – Multi-Family

REN Criteria	3C-REN TCR-Res-002
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	In accordance with D.23-06-055, 3C-REN's residential initiatives are tailored to address hard-to-reach residential segments, encompassing single-family and multifamily dwellings, both renters and homeowners, as well as Disadvantaged Communities (DACs) within its jurisdiction. While extending services to all residents across the three counties, particular emphasis is placed on marketing, outreach, and program design aimed at the challenging populations residing in moderate-income and rural areas. Higher incentives are available to properties serving multifamily renters, smaller “mom and pop” properties, properties with residents who speak a primary language other than English, deed restricted low income, and/or properties where a majority of households are within the CARE/FERA income guidelines. A substantial portion of incentive funds paid to date has been directed toward these hard-to-reach communities. In 2024, outreach initiatives aim to utilize a database of property owners to tailor outbound marketing endeavors, ensuring a focused approach towards hard-to-reach audiences. In 2024 and beyond, the program also plans to partner with cities that contain HTR and/or DAC multifamily properties for outreach, with cobranding and collaborative outreach leveraging local governments as trusted messengers for HTR and DAC property owners.

3C-REN: Single Family NMEC (TCR-Res-003)

Implementer: Recurve

The residential Single-Family Program delivers measurable energy savings targeted towards HTR single-family households in the 3C-REN service territory. Savings will be claimed using a population Normalized Metered Energy Consumption (NMEC) Measurement and Verification (M&V) platform. Upfront incentives reduce customer cost. Performance incentives push energy efficiency installers (aggregators) to maximize both customer savings and grid benefits.

Table 3: Compliance with REN Program Criteria: Residential – Single Family

REN Criteria	3C-REN TCR-Res-003
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	In accordance with D.23-06-055, 3C-REN's residential initiatives are tailored to address hard-to-reach residential segments, encompassing single-family and multifamily dwellings, both renters and homeowners, as well as Disadvantaged Communities (DACs) within its jurisdiction. Emphasis is placed on marketing, outreach, and program design aimed at the populations in moderate-income and rural areas. In addition, the program's incentive structure is designed to drive contractors to serve HTR audiences; upfront incentives are three times higher for these participants than market rate customers. The performance incentives that are paid to contractors after the projects are installed are also three times higher for these customers. Therefore, contractors/aggregators are able to dramatically reduce costs for HTR clients and receive significantly higher bonus payments themselves if their clients show actual metered energy savings.

PG&E Residential Programs

PG&E: California Energy-Smart Homes Program (PGE_SW_NC_Res_electric)

Implementer: TRC

The statewide California Energy-Smart Homes All-Electric Residential Program (Energy-Smart Homes Program or CESHP) supports a high-level approach to achieving California's advanced energy efficiency policy goals by engaging with builders, developers and existing multi-family building owners, managers and contractors, to encourage them to build all-electric and recruit potential projects. The program is available to projects located in PG&E, SCE, and SDG&E electric utility territories. The program offers incentives for single-family, duplex, townhome, multi-family low-rise (three or fewer stories), accessory dwelling unit (ADU), and alteration projects. The objective of the program is to influence the decision and ease the transition to adopt all-electric new construction practices. To accomplish this, the program will educate potential participants and stakeholders on the features of all-electric homes, enroll projects, emphasize the installation of advanced energy efficiency measures, and facilitate future opportunities through non-incentivized, prerequisite measures that position homes to install high-impact demand response technologies more easily in the future. For more information visit caenergysmarthomes.com. The California Energy Design Assistance programs, included in the Commercial programs section below, also offers support for multifamily buildings over three stories.

PG&E: Energy Savings Assistance – Northern Multi-Family Whole Building

Implementer: TRC

PG&E launched the new Energy Savings Assistance - Northern Multi-Family Whole Building (ESA - Northern MFWB) program in July 2023 to replace the ESA CAM. The Northern MFWB program provides whole-building upgrades, including resident units and common areas, to income-qualified properties. The Northern MFWB program takes a holistic approach to engaging income-qualified multi-family stakeholders within PG&E's service territory, with end-to-end project support for property owners/representatives and tenants, and strategies that drive installation contractor and trade ally success. The program is accessible to both deed-restricted and non-deed restricted properties and features Single Point of Contact (SPOC) services that connect multi-family property owners and tenants with incentive-layering opportunities and financing resources to lower the barriers to participation. The Northern MFWB program strives to meet the cost-effectiveness guidelines and the ESA Program portfolio goals to achieve deep savings; the program design also considers opportunities to maximize "a building's demand response (DR) technologies, greenhouse gas (GHG) reduction, water energy nexus, and the health, comfort, and safety of tenants".

PG&E: Energy Savings Assistance

Implementer: RHA and Resource Innovations

PG&E's Energy Savings Assistance Program (ESA Program) provides energy efficiency services to income qualifying customers in single-family homes and mobile homes in the PG&E Territory, including the Bay Area. The objective of the ESA program is to reduce energy usage, while also increasing the health, comfort, and safety of participants. Households with income at or below 250% of the federal poverty line qualify.

PG&E: Single Family NMEC (Normalized Meter Energy Consumption) (PGE MAP)

Implementer: AESC and Recurve

PG&E has two Implementers of the Market Access Program (MAP), AESC and Recurve. Ecobee is an active Aggregator in the MAP programs, whom serves single family customers with Ecobee Thermostats. The MAP program ended in March 2024, and will not be open to new applications. PG&E is currently soliciting for a new Summer Reliability program to offer in its place.

PG&E Virtual Energy Audit Program – HomeIntel Program (PGE_Res_001b)

Implementer: Home Energy Analytics (HEA)

PG&E offers a third-party P4P program called HomeIntel (implemented by Home Energy Analytics). The Program offers free energy audits, education, and personal energy advisor services to residential customers and is available to customers in all PG&E counties. The Program offers customized recommendations for simple, no-cost, and low-cost changes to help customers reduce energy use and lower bills. Enrolled customers receive a monthly energy profile report.

PG&E Home Energy Checkup (HEC) - (PGE_Res_002a)

Implementer: Oracle

The Home Energy Checkup (HEC) Program is a self-guided online assessment that helps customers understand where they use energy in their homes. It also provides energy-saving tips and suggestions based on the customer's specific responses and generates a simple checklist plan. The plan is saved on the customer's PG&E My Account website to track progress as items are completed.

PG&E: Continuous Energy Feedback Program (PGE_Res_002d)

Implementer: Oracle

The Continuous Energy Feedback Program (CEFP) uses multiple behavior-based energy efficiency strategies to support our Residential and SMB customers in understanding and empowering them to manage and lower their household/business energy consumption. This program uses information and customer engagement strategies to prompt non-rebated behavior change that can be measured using randomized controlled trials to validate savings and demonstrate attribution. As a result of their changed behaviors, customers can manage their energy use and energy behaviors, make more efficient purchasing decisions, and take energy-related actions to lower their energy use.

PG&E: Residential Equity Pilot – Empower My Home (PGE_Res_Equity)

Implementer: Resource Innovations

Empower My Home is a pilot initiative aimed at accelerating full and partial building electrification for disadvantaged communities, low-income, and hard-to-reach residential customers. The program covers 100% of the project costs for qualifying customers (up to 250% FPG), including upgrades such as induction stoves, heat pumps, water heaters, insulation, duct sealing, and electrical panel upgrades. It initially targets eligible customers in Oakland, and San Francisco, then Fresno and Stockton in later phasing.

Residential Coordination

For its residential programs, CCR REN, 3C-REN and PG&E will engage in regular communication through email and meetings. Meetings may include discussions on customer choice, marketing, and double dipping prevention. Where there is a possibility of "double dipping", protocols will be developed to prevent it from occurring. This will require the data requestor (i.e., implementer) to complete an in-depth security review and data sharing agreements among the implementer, CCR REN or 3C- REN and

PG&E to ensure customer data is protected. To ensure that each PA is aware of other potentially overlapping programs and resources, each PA will provide written notice of new programs in the form of notice sent to the service list, as well as an invitation to the public webinar for all stakeholders. Changes or updates to programs will also be communicated via quarterly program coordination meetings between the PAs.

To ensure that customers are aware of others' programs, where that administrator does not have a similar offering, the PAs will have regularly reoccurring meetings to develop and employ coordination practices to ensure that there are protocols for customer handoff should either party identify an opportunity for another's program. Each PA will ensure the customer hand off to the recommended party will occur while the customer is engaged by email/phone to ensure a seamless service experience for the customer between different PA programs. CCR REN and the IOUs' ESA program are actively exploring partnership opportunities and are enthusiastic about bridging and layering our programs to better serve hard-to-reach customers. We will further explore these opportunities during the next JCM review.

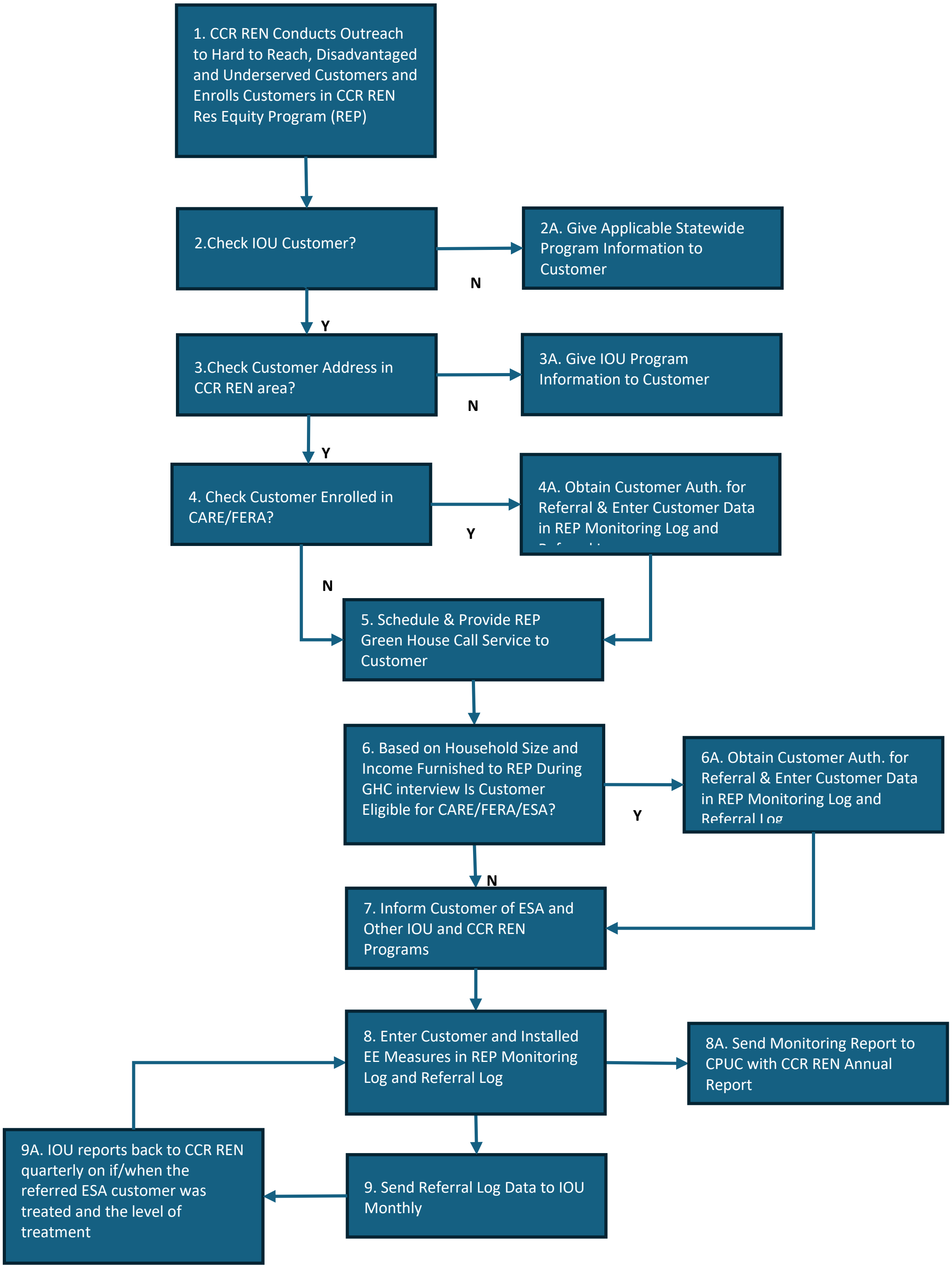
CCR REN's Residential program will not be offered in San Luis Obispo County since the county is already served by 3C-REN's Residential program.

CCR REN RES and IOU ESA Program Joint Coordination

In compliance with Resolution E-5400[15] CCR REN and IOU are working together to explore and develop an innovative collaboration process in which CCR REN would install certain ESA-eligible measures in ESA-eligible customer homes and IOU would reimburse CCR REN for their cost and would claim the energy savings in their ESA program. In the interim while the above process is being developed and analyzed for feasibility, CCR REN has developed a proposed interim coordination procedure, described in detail below. The Decision Tree corresponding to this proposed interim coordination procedure is included as Figure 1.

[15] CPUC Energy Division Resolution E-5400 dated August 28, 2025, Revised 2024-27 energy efficiency portfolio business plans for Northern California Rural Regional Energy Network and Central California Rural Regional Energy Network

Figure 1: CCR REN Proposed RES Equity and IOU ESA Program Coordination Decision Tree



Description of Coordination and Referral Procedure

Step 1: CCR REN conducts outreach to hard to reach, disadvantaged and underserved customers and enrolls a customer in CCR REN's RES Equity Program (REP)

Step 2: CCR REN checks whether the customer is a IOU customer.

Step 2A: If customer is not a IOU customer, they are not eligible for CCR REN's REP program. CCR REN will provide information on statewide programs that customer may be eligible for.

Step 3: If the customer is a IOU customer, CCR REN then checks that the customer address is within CCR REN's service area.

Step 3A: If the customer is not within CCR REN's service area, the customer is provided information about IOU programs.

Step 4: CCR REN checks the IOU customer data if customer is enrolled in CARE/FERA. If the customer is not enrolled in CARE/FERA, then proceed to Step 5.

Step 4.A.: If customer is enrolled in CARE/FERA CCR REN obtains customer's authorization to make a referral to IOU ESA program and enters this customer's information in the REP Monitoring Log and Referral Log and proceeds to Step 5.

Step 5.: CCR REN schedules an appointment and provides REP services and measures in the customer home, including a walk-through energy survey and briefing with the customer, and installation of appropriate energy efficiency measures. All services are provided at no cost to the customer. To prevent any duplication of measure installation, existing measures in the home are verified by REP and if an efficient option is found to be already installed and operation, the equivalent REP measure is not installed by REP. For example, a new LED lamp is only installed by REP if the existing lamp is incandescent or fluorescent. REP will not replace an energy efficient measure found to already exist in the home.

Step 6.: CCR REN conducts an interview with the customer while at the customer home and based on customer-provided household size and income determines whether customer may be eligible for IOU CARE/FERA/ESA. If yes, then proceed to Step 6.A. If no, proceed to Step 7.

Step 6.A.: CCR REN obtains customer authorization for referral and enters customer's information in the REP Monitoring Log and Referral Log and proceed to Step 7.

Step 7.: CCR REN informs customer of ESA and other IOU and CCR REN programs that customer may be eligible for.

Step 8.: CCR REN enters customer information and installed EE measures in REP Monitoring Log and Referral Log.

Step 8.A.: CCR REN sends Monitoring Report to CPUC with CCR REN Annual Report.

Step 9.: CCR REN sends Referral Log data to IOU monthly

Step 9.A.: IOU reports back to CCR REN quarterly with information about if/when the referred customer was treated and level of treatment. CCR REN incorporates this information in the Annual Monitoring Report to the CPUC.

COMMERCIAL SECTOR

CCR REN: Commercial Energy Improvement Program (CEIP)

Implementer: Willdan Energy Solutions

The CCR REN CEIP offering will help foster and grow a market for energy efficiency and electrification services for commercial customers, with a focus on serving those that are located in disadvantaged or underserved communities, are hard-to reach, and/or are struggling to afford energy costs. The program offerings will be tailored to the customer and will include a combination of resource and equity measures provided at no cost to customers in hard-to-reach markets. To maintain cost effectiveness while supporting energy affordability for customers, CCR REN will deploy an innovative program that focuses on creating transformative outcomes for customers such as small businesses that otherwise would not be able to consider electrifying or retrofitting their equipment.

The CCR REN CEIP leverage Partner Organization relationships with local Community Based Organizations (CBOs) for direct outreach to potential customers. The primary marketing approach will be through the Partner Organizations, in collaboration with CBOs and supplemented with more traditional tactics, resulting in future referrals within local communities and creating a sustainable channel for ongoing customer acquisition. Sharing and showcasing the positive outcomes from program participants is a key strategy to drive both program interest, and more broadly, an interest in energy efficient technologies and electrification pathways. This will lead to optimal outcomes for commercial customers located in Central California.

In alignment with CCR REN's mission of increasing new employment opportunities that benefit future generations and assist in building community wealth for hard-to-reach/rural communities, CCR REN Partner Organizations will work with the program consultant to recruit and train 12 Clean Energy Advisors by integrating a hands-on learning Clean Energy Academy into this program. The Clean Energy Academy consists of a repertoire of over 50 successfully designed and delivered workforce development and contractor training courses that will be tailored into a specific CCR REN curriculum. The clean energy academy curriculum, and the hands-on experience, will give the 12 Clean Energy Advisors the skills they need to enter the energy efficiency and electrification industry in the communities where they live.

Table 4: Compliance with REN Program Criteria: CEIP

REN Criteria	CRR-COM-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A

3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	The program will provide turn-key Direct Install services to 100% hard-to-reach commercial customers. Prior to services being provided, each potential participant will be qualified as HTR. Once qualified for the program, the HTR participant will be guided through the direct install process by an assigned Clean Energy Advisor (CEAs). CEAs will be hired in-community and will be given the workforce training and education opportunities needed to advance a career in energy efficiency. The program will prioritize Resource Acquisition in HTR communities while promoting equity and workforce development.

Marketing and Outreach to HTR Commercial Customers: CCR REN's marketing and outreach is specifically designed to target only hard-to-reach commercial customers by:

1. Prioritizing geographic hard-to-reach and disadvantaged communities
2. Narrowing outreach to businesses with a high probability of renting or leasing
3. Assessing business size with available data to limit outreach to those with a high probability of having less than 25 employees
4. Serving small businesses that are unlikely to exceed energy use thresholds
5. Where possible, work in census tracts where there are high percentages of households with a primary language other than English.

CRR REN's program outreach focuses on in-community, door-to-door outreach. Potential participants attest to qualifying as hard-to-reach as prequalification to service. CCR REN's approach to targeting and outreach relies on hard-to-reach criteria. For example, CCR REN's rural context lends to a high degree of certainty that potential participants meet the geographic criteria. In those cases, only one additional HTR criteria is needed such as renting or leasing. All participants will have signed attestations that they qualify as HTR.

3C-REN: Commercial Marketplace (TCR-Com-001)

The Commercial Marketplace program will offer commercial customers increased technical assistance, project support, and financing options. The Commercial Marketplace program will implement comprehensive incentive offerings for energy improvements through population NMEC program targeting HTR business customers. By doing so, multiple benefits can be realized through one central effort. NMEC offers the opportunity to realize stranded savings from measures that have been sunset from deemed savings-based EE programs, yet still offer savings opportunities for underserved commercial customers who need these upgrades. In addition, the NMEC approach showcases a clear and direct relationship between a business's efforts and associated benefits, adding public value to this offering. 3C-REN: Commercial Marketplace (TCR-Com-001)

Through two branches of the commercial program—Green Business Program (GBP) support and a new NMEC pathway—3C-REN will provide technical and financial assistance to local businesses for implementing energy saving measures, focusing on HTR customers. Customer participation can include education on local program offerings and benefits, implementing measures as part of Green Business certification, and/or making upgrades as part of a NMEC program offering incentives. These efforts will yield energy savings, enhanced customer service, community support and awareness of energy efficiency resources, and key partnership development with local organizations. HTR commercial customers will be targeted for participation as a priority for both 3C-REN and the GBPs. The program will optimize resources, communications, and resulting participation potential.

Table 5: Compliance with REN Program Criteria: Commercial

REN Criteria	3C-REN TCR-Com-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	The. Commercial Marketplace program is positioned to address HTR customer segments. PG&E's Simplified Savings Micro/Small Equity Program is distinctly designed for this segment. Targeting Disadvantaged Communities and/or Hard-to-Reach customers located in DAC areas or qualifying for HTR. Customers that have a demand of 50 kW or less, and not have more than 10 sites in their ownership group.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	In adherence to D.23-06-055, 3C-REN's commercial initiative is designed to cater to hard-to-reach customers and Disadvantaged Communities (DACs) within its jurisdiction. The Commercial Marketplace program provides a NMEC project pathway, allowing for adaptable savings captured across various commercial facilities and project types. This initiative is complemented by locally-focused outreach and assistance, aiming to secure positive outcomes for HTR businesses. In 2024 and beyond, outreach initiatives aim to utilize a database of property owners to tailor outbound marketing endeavors, ensuring a focused approach towards hard-to-reach audiences.

3C-REN: Energy Assurance Services (TCR-CC-001)

The Energy Assurance Services (EAS) program will provide outreach and technical assistance to support public sector and commercial customers in pursuing comprehensive load management and resiliency projects through other rebate programs available in the region from 3C-REN and other PAs. This program design builds on 3C-REN member agency Santa Barbara County's existing Energy Assurance Services program for critical facilities and expands it to cover the entire 3C-REN territory with a cross-cutting approach and broader focus on both public and commercial customers.

Table 6: Compliance with REN Program Criteria: Cross-cutting - EAS

REN Criteria	3C-REN TCR-CC-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	The 3C-REN program offers on-the-ground support for energy audits, data analysis to understand project opportunities for public and commercial facilities, as well as guidance in navigating the process of finding and applying for the appropriate program. 3C-REN will expand Santa Barbara County's current Energy Assurance Services program to cover the entire 3C-REN territory with a broader focus on public and commercial sector customers.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

PG&E Commercial Programs

PG&E's Commercial EE programs offer non-residential customers a suite of approaches, products, and services to help overcome the market barriers to optimizing energy management. These programs offer comprehensive energy management solutions, which may include EE, as well as IDSM, through strategic energy planning support, technical support services such as facility audits and calculation or design assistance, and financial support through rebates, incentives, and financing.

PG&E: Commercial Deemed Incentives Program (PGE 21012)

The Commercial Deemed Incentives program offers a limited number of prescriptive rebates directly to customers, vendors, or distributors for the installation or sale of energy efficient equipment. These measures reach across technology segments including agriculture, HVAC, refrigeration, and water heating, where there is not an overlap with Statewide programs. While reduced, the prescriptive rebate approach continues to fill gaps in other programs and remains an attractive option for smaller projects.

PG&E: California Energy Design Assistance All-Electric (CEDAE) Program (PGE_SW_NC_NonRes_electric)

Implementer: Willdan

The statewide CEDAE program serves commercial, public, high-rise multifamily residential, industrial, and agricultural new construction sectors, and major alterations facilities across the PG&E, SCE, and

SDG&E territories. This program contributes to the IOUs' efforts to achieve their share of California's ambitious energy efficiency (EE), greenhouse gas reductions, and meet electrification goals by offering EE options tailored to each building during the design and construction process. CEDAE also offers technical assistance early in the process when it has the greatest influence on design and operation, driving energy savings beyond code and gathering data to further advance future codes. The CEDAE program enrolls and influences the non-residential new construction market to achieve deeper energy savings and decarbonization goals through key activities such as customer incentives, outreach and education, real-time energy modeling, verification, Integrated Demand Side Management (IDSM) support and data tracking to inform future codes and standards. For more information, visit California Energy Design Assistance (willdan.com).

PG&E: California Energy Design Assistance Mixed Fuel (CEDAM) Program) (PGE_SW_NC_NonRes_mixed)

Implementer: Willdan

The CEDAM program serves commercial, public, high-rise multifamily, industrial, and agricultural new construction sectors, and major alterations facilities across the PG&E, SCE, SoCalGas, and SDG&E territories. CEDAM contributes to the IOUs' efforts to achieve their share of California's ambitious energy efficiency (EE), greenhouse gas reduction, and electrification goals by offering technical assistance early in the process when it has the greatest influence on design and operation, driving energy savings beyond code and gathers data to further advance future codes. The CEDAM program will enroll and influence the non-residential new construction market to achieve deeper energy savings and decarbonize through key activities such as customer incentives, outreach and education, real-time energy modeling, verification, IDSM support and data tracking to inform future codes and standards. For more information, visit California Energy Design Assistance (willdan.com).

PG&E: Commercial Calculated Program (PGE 21011)

PG&E implements the Commercial Calculated Incentives program. Currently in the ramp-down process, this program is focused on meeting existing customer commitments, and closed to new applications. The program has provided financial incentives for non-residential customers to retrofit equipment or systems that exceed applicable code and/or industry standards in existing buildings. Its mission has been to offer financial and technical assistance for customers to undertake retro-commissioning (RCx) projects and implement measures that improve facility operations. These elements of service have been built into third-party programs which address most customer circumstances.

PG&E: Commercial Energy Advisor Program (PGE 21014)

The Commercial Energy Advisor program provides customer education and encourages participation in EE, DR, self-generation programs and promotes awareness of GHG and water conservation activities. The program provides energy savings opportunities and continuous improvement over time by supporting online self-service tools, such as Business Energy Checkup[16]. Through Business Energy

[16] Business Energy Checkup is located within the pge.com/myaccount website for customers to perform a Facility Audit, read about recommendations on energy use, and explore rate options.

Checkup, customers receive rate analysis, check their bills, and receive tips and tricks for saving energy. Aligning integrated improvement opportunities with customers' needs, the Energy Advisor Program also increases program participation and adoption rates by helping customers to better understand EE benefits.

PG&E: NetOne Commercial Program (PGE_Com_003)

Implementer: Ecology Action

The NetOne Commercial Efficiency Program is a downstream program that provides energy efficiency services, technical services, and incentive processing. Primarily serving the commercial real estate, hospitality, grocery and retail markets, NetOne provides a suite of incentives to commercial customers to install refrigeration, HVAC, lighting, and meter-based energy savings using the Deemed, Custom, and NMEC platforms. The program also offers On Bill Financing to promote customer participation. The broad offering also puts NetOne in the position of accepting project types and sizes from a wide variety of market segments.

PG&E: Advanced Energy Program for High Tech and Biotechnology (PGE_Com_004)

Implementer: Resource Innovations

The Advanced Energy Program is a demand side management (DSM) program offering site specific solutions for high-tech and biotech (HTBT) customers.

The program focuses on identifying and implementing energy efficiency opportunities in the unique HTBT sector, with facility types ranging from multi-site campus retrofits to laboratory, clean room, and data center upgrades. Additionally, the program offers extensive guidance on control upgrades, and retro-commissioning (RCx) to optimize existing equipment, scheduling, and control sequences while shifting demand away from local and system peak periods.

The Advanced Energy Program targets medium to large high-tech and bio-tech facilities but is available to smaller customers in the sector as well. Typical projects have ranged from 10,000 sq. ft of small offices to millions of sq. ft across high-tech and bio-tech campus facilities. Annual electric consumption from customer projects has ranged from several hundred thousand kWh to tens of millions of kWh. The program has typically been a building controls-centric program with HVAC systems as its primary technology focus. This program has primarily leveraged the customized incentive process but provides support for Deemed and NMEC projects, as well as assistance with PG&E's On-Bill Financing on an as-needed basis with customers.

PG&E: Healthcare Energy Fitness Initiative (PGE_Com_005)

Implementer: Resource Innovations

The Healthcare Energy Fitness Initiative (HEFI) is a ~~customer-centric~~ demand side management (DSM) program that offers tailored solutions for PG&E's healthcare customers including public or private inpatient (hospital), outpatient (clinics), and residential living facilities. HEFI focuses on the highest potential end uses in the healthcare segment, including HVAC retrofits, controls, and optimization – including central heating, cooling, and steam plants; lighting fixtures and advanced lighting controls; process and equipment loads, refrigeration, and plug loads.

The Healthcare Energy Fitness Initiative program targets medical facilities primarily for medium and large customers but is available to smaller customers in the sector as well. Typical projects have ranged from small medical office building spaces with lighting upgrades to multi-year central plant replacement efforts. This is a building controls-centric program with HVAC systems as its primary technology focus. This program has primarily leveraged the customized incentive process but provides support for Deemed and NMEC projects, as well as assistance with PG&E's On-Bill Financing on an as-needed basis with customers.

PG&E: Measured Savings for Summer Reliability (PGE_Com_006)

Implementer: Alternative Energy Systems Company (AESC)

The Measured Savings for Summer Reliability Program has the primary objective to reduce peak kW demand utilizing a meter-based approach with a strategic mix of measures and targeted load shapes to maximize Total System Benefit (TSB) delivery. The goal will be to provide a customer and aggregator friendly platform for customers of all sizes to leverage a full range of customer-enabling behavioral and retrofit strategies to shift and reduce load. Inclusion of On-Bill and alternative financing will expand not only project scope but also the customer pool to capture stranded savings.

PG&E: Simplified Savings Micro/Small Equity Program (PGE_Com_SmallBiz)

Implementer: Resource Innovations

The Simplified Savings Program is PG&E's ~~f~~equity segment program, which provides marketing, outreach, and education, as well as direct install services, financing, and incentives for a traditionally underserved segment. Simplified Savings focuses on customers with a demand of less than 50kW and located within a CalEnviroscreen Disadvantaged Community (DAC). Hard to Reach (HTR) customers who meet the demand requirements but are not located within a DAC community may also qualify for the program. Bill reduction and customer engagement are the primary measures of success of this equity program. Simplified Savings intends to engage 7,500 micro- and small business customers over its current three-year term.

PG&E: Commercial Strategic Energy Management (PGE_Com_009)

Implementer: Stillwater Energy

The Commercial Strategic Energy Management (CSEM) program is a holistic, long-term, whole facility approach that uses a meter-based measurement and verification methodology to determine energy savings from all program activities at the facility, including capital projects, maintenance and operation improvements, as well as retrocommissioning. Participants receive coaching to develop their own energy management practices that will persist beyond their engagement with the program. Stillwater emphasizes a cohort-based approach where participants learn together and from each other through knowledge sharing and networking. The program launched in Q2 2025 and serves the Commercial, Institutional, and Public segments including, but not limited to, higher education, K-12 schools, government, hospital, lodging, office, grocery, commercial multifamily, warehouses not associated with manufacturing sites, and other healthcare. Recruitment efforts will take care to work around sub-segments already served by comparable programs, such as the Statewide HEEP program. Measures typical within CSEM program include HVAC (both heating and cooling), lighting, server closets, water pumping for buildings, water heating, and plug load.

Commercial Coordination

The CCR REN program will serve less than 100 customers over the next three years, and it will not be offered in San Luis Obispo County since an existing Commercial program offering serving similar customer types already exists via 3C-REN.

CCR REN, 3C-REN and PG&E will engage in regular communication through email, with the potential for establishing a regular meeting schedule (for example, quarterly) if needed to streamline communication channels. Meetings may include discussions on customer choice, marketing, and double dipping prevention.

CCR REN, 3C-REN and PG&E will develop a protocol to verify customer eligibility to prevent "double dipping" of incentives. This will require the data requester (i.e., implementer) to complete an in-depth security review and data sharing agreements among the implementer, CCR REN or 3C-REN, and PG&E to ensure customer data is protected.

CCR REN, 3C-REN, and PG&E program staff will present all available program options and evaluate customer needs on a case-by-case basis. If CCR REN encounters a customer they cannot serve through its program (perhaps through geographical requirements), or that would be better served by the PG&E or 3C-REN programs (perhaps due to customer size or project scope), it will hand off the customer to the appropriate PG&E contact. If PG&E encounters a customer that they cannot serve or that would be better served by the CCR REN or 3C-REN program (perhaps due to customer size or project scope), they will hand off the customer to the appropriate CCR REN or 3C-REN contacts.

AGRICULTURAL SECTOR

CCR REN does not have any programs in the Agricultural Sector; therefore, below is solely a description of the 3C-REN and PG&E programs.

3C-REN: Agriculture Technical Assistance (TCR-Ag-001)

The Agriculture Technical Assistance program will take a relationship-based approach that relies on partnership-building and personalized, customized technical assistance to help improve customer education and program participation among agricultural customers in the tri-county region. Technical assistance could include but is not limited to benchmarking, energy assessments, referrals to complementary programs wherever possible, and project management assistance to shepherd customers through the participation process. This is a non-resource program that will feed participants into appropriate IOU agricultural programs. The program will provide specialized support for indoor agriculture/cannabis and water-energy nexus measures and focused outreach to smaller producers and socially disadvantaged agricultural customers.

Table 7: Compliance with REN Program Criteria: Agricultural

REN Criteria	3C-REN TCR-Ag-001
1. Activities that utilities or CCA PAs 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	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	The 3C-REN program serves smaller and socially disadvantaged agricultural customers that are not reached by utility, or other PA programs. By providing personalized, end-to-end technical assistance through identifying energy upgrade opportunities, and supporting customers in implementing these projects, this program will address barriers to energy efficiency implementation for agricultural customers. These customers not reached by utility, or other PA programs will be educated on existing and emerging programs so that they too can capitalize on energy savings opportunities.

PG&E Agricultural Programs

PG&E: Agricultural Calculated Program (PGE 21031)

Implementer: PG&E

PG&E implements the Agricultural Calculated program. Currently in the ramp-down process, this program is focused on meeting existing customer commitments, and closed to new applications. These elements of service have been built into third-party programs which address most customer circumstances.

PG&E: Agricultural Deemed Incentives Program (PGE21032)

Implementer: PG&E

The Agricultural Deemed Incentives program provides fixed rebates for high volume measures such as variable frequency drives (VFDs) for irrigation pumps or process fans. Deemed retrofit measures have fixed incentive amounts per unit/measure and are intended for projects that have well-defined energy and demand savings. This is a legacy program implemented by PG&E, and is in the process of ramping down.

PG&E: Agricultural Energy Advisor Program (PGE21034)

Implementer: PG&E

The Agricultural Energy Advisor Program provides customer education and encourages participation in EE, DR, self-generation programs and promotes awareness of GHG and water conservation activities. The Program provides energy savings opportunities and continuous improvement over time by supporting online self-service tools, such as Business Energy Checkup[17], for agricultural customers. Through Business Energy Checkup, customers receive rate analysis, check their bills, and receive tips and tricks for saving energy. Aligning integrated improvement opportunities with customers' needs, the Energy Advisor Program also increases program participation and adoption rates by helping customers to better understand EE benefits.

PG&E: Agricultural Energy Savings Action Plan (AESAP) Program (PGE_Ag_001)

Implementer: TRC

The Agricultural Energy Savings Action Plan (AESAP) Program supports PG&E's vision for the agricultural sector to maximize yield while reducing energy consumption. AESAP uses data, technical assistance, analytics, energy efficiency measures and marketing to reduce demand, increase operational efficiency, and broaden customer participation while leveraging the custom, deemed, and meter-based savings platforms. AESAP also promotes and leverages OBF and other private financing options as a tool to off-set the barrier of lack of capital to fund projects.

Agricultural Coordination

Although CCRREN does not have any Agricultural programs, the joint PAs referenced in this JCM and throughout the State meet quarterly to discuss the Agricultural sector. Overlap, concerns, and coordination will be communicated through that regular meeting.

PUBLIC SECTOR

CCR REN: Public Equity Program (CCR-PUB-001)

The CCR REN Public Equity Program is designed to provide support to hard-to-reach, disadvantaged, and underserved public agencies in the counties of Monterey, San Benito, and Santa Cruz counties only to help them access funding to address energy efficiency opportunities. The program builds on CCR REN Partner Organizations' existing relationships, data, and experience bringing energy savings to public sector customers.

The primary barriers faced by hard-to-reach public agencies when considering energy efficiency opportunities in their facilities are lack of funding, staff capacity, and understanding of available resources. The CCR REN Public Equity Program will address these barriers, acknowledging that the needs and interest of each public facility will vary, to ensure equitable access to resources. The objectives of the program are to increase energy savings, drive public agency participation in existing energy efficiency programs (i.e. existing investor-owned utility (IOU) programs such as local government partnerships and the K12 program), and help secure competitive state and federal grants.

[17] Business Energy Checkup is located within the pge.com/myaccount website for customers to perform a Facility Audit, read about recommendations on energy use, and explore rate options.

For hard-to-reach public agencies, providing support at every step of the process is critical since they are faced with cascading challenges that often need immediate response, such as pandemic events, climate change induced disasters, and earthquakes. Providing agencies with the resources they need to improve their facilities through energy efficiency, demand response, and electrification is crucial for agencies to succeed in their mission of serving their communities. There is a gap between initial energy efficiency audits that initially identify opportunities and the deeper analyzes that need to be completed in order to obtain funding for deep energy efficiency retrofits. The CCR REN public equity program is intended to fill that gap.

A focus of the program will be strengthening the Partner Organization's relationships with public agency staff and elected officials. By gaining trust, public agencies will be more willing to consider and later implement energy efficiency opportunities. This in turn will help facilitate more comprehensive public agency energy efficiency, demand response, and electrification projects, resulting in deeper energy and cost savings. Reporting successes to both senior staff and elected officials will also lead to knowledge transfer among public agencies and help create a policymaker-level understanding that energy efficiency can deliver deep value and savings not only to agency facilities, but also to the community at large.

Table 8: Compliance with REN Program Criteria: Public

REN Criteria	CCR-PUB-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	CCR-PUB-001 will provide technical assistance and supportive services to HTR public customers in the Monterey Bay. The program will prioritize serving public agencies that are geographically HTR and provide services to disadvantaged and underserved communities.

Marketing and Outreach to HTR Public Customers:

CCR REN's Public Equity program targets public agencies serving hard-to-reach rural areas, and/or disadvantaged and underserved communities. Specific marketing and outreach tactics will include:

Program staff conducting email outreach to organize one on one meetings with public agencies in Monterey County and public agencies that serve low-income census tracts, disadvantaged census tracts, and that are located in the service areas of schools serving more than 75% free and reduced priced meals;

Hosting hybrid workshops that present opportunities for public agencies to participate in energy efficiency programs

3C-REN: Energy Assurance Services (TCR-CC-001)

As referred to in the commercial section, the Energy Assurance Services (EAS) program will provide outreach and technical assistance to support public sector and commercial customers in pursuing comprehensive load management and resiliency projects through other rebate programs available in the region from 3C-REN and other PAs. This program design builds on 3C-REN member agency Santa Barbara County's existing Energy Assurance Services program for critical facilities and expands it to cover the entire 3C-REN territory with a cross-cutting approach and broader focus on both public and commercial customers.

PG&E Public Sector Programs

PG&E: Local Government Partnership – CC LEAP (PGE_PUB_001)

Implementer: The Energy Coalition

Since 2020, PG&E has had contracts with Local Government Partners (LGPs) within CCR REN and 3C-REN service area that support the following counties with the full LGP offerings: Santa Barbara & San Luis Obispo. Service includes, support for energy efficiency project leads for PG&E's Government and K-12 Comprehensive resource programs.

PG&E's Local Government Partnerships (LGPs) are collaborations with public entities that shape EE and sustainability at the local, regional, and statewide level. These partnerships aim to meet the needs of local and state government, schools, and educational institutions to offer comprehensive solutions that are flexible, innovative, and a reflection of the communities' needs.

CC-LEAP provides support K-12 public schools and offers energy planning services for public entities interested in benchmarking their facilities, pursuing local energy reach codes and ordinances serving public sector customers. LGPs are one of PG&E's vehicles for serving small medium businesses (SMB), including Hard-to-Reach and Disadvantaged Communities.

LGPs in Santa Barbara and San Luis Obispo provide utility bill analysis and site visits to develop a set of recommended energy efficiency and electrification interventions, to show what a local building or portfolio of buildings would need to do to meet local energy goals. The LGPs recommend the best available rebate, incentive, financing, technical assistance offerings, statewide, and other programs (ex. WISE) for all projects and interventions identified. PG&E LGPs offer long term plans such as Climate Action Plans and Energy Action Plans.

Services typically offered through LGPs include the following:

- Benchmarking public buildings
- Facilitating energy efficiency projects in public buildings and supporting implementation of Energy Management Processes/Plans
- Facilitating energy efficiency projects for HTR or DAC customers

- Facilitating hosting trainings for public sector staff and customers
- Development of Energy Action Plans
- Assistance in the development of local EE Reach Code ordinances
- Completing Municipal/K-12/Community-wide GHG inventories.

PG&E: Government and K-12 Schools Program (PGE_PUB_009)

Implementer: Willdan

The Government and K-12 (GK-12) Comprehensive Program includes a broad offering of EE measures to diverse markets of local governments and K-12 public and charter schools. GK-12 has an emphasis on building electrification, with a strong focus on water heating, which aligns with substantial interest in the government and K-12 sectors. Utilizing the meter-based savings platforms, the Program offers HVAC and Lighting equipment and control system upgrades, retro commissioning recommendations, and behavioral strategies to optimize system efficiencies. The Program is designed to cost-effectively complete all sizes and scopes of projects and has a goal of engaging nearly half of its customers from the HTR and DAC sectors.

PG&E: State of California Energy Strategy and Support Program (PGE_SW_IP_Gov)

Implementer: AESC

The State of California Energy Strategy and Support Program (SOC ESS) opened to customers in September 2021. SOC ESS helps California State Agencies (excluding higher education, which will be served by a Statewide program led by SCE) reach their greenhouse gas (GHG) emission reductions goals while reducing energy use through EE and Integrated Demand-side Management (IDSM) project planning, technical support, and financial assistance. The program builds on the State's successful existing approaches while adding new channels to address key barriers in California state agencies. SOC ESS is designed to overcome structural and operational barriers related to staffing and capacity, capital and financing, and safety to support successful realization of energy savings in state buildings. The Program offers two pathways with varying levels of support. Pathway 1 provides agencies that are committed to a minimum level of energy savings and program engagement with high-touch, customized, and strategic portfolio-wide and engineering support plus staff augmentation. Pathway 2 provides support on individual projects as identified and pursued. Additionally, the Program continues to provide all agencies with the services they relied on through the prior statewide partnership programs, including financial, policy, technical, project, and program application support.

Public Coordination

CCR REN's public sector program has not yet launched at the time of JCM development. However, CCR-REN, 3C-REN, and PG&E will engage in regular communication through email, with the potential for establishing a regular meeting schedule (for example, quarterly) if needed to streamline communication channels.

CCR REN, PG&E and 3C-REN program staff will present all available program options and evaluate customer needs on a case-by-case basis. If CCR REN encounters a customer that would benefit from a

3C-REN or PG&E program already operational, or after CRR REN launches its program, they encounter a customer their future program cannot serve (perhaps due to geographical requirements), or that would be better served by a different program (perhaps due to customer size or project scope), they will provide information about and refer the customer to the appropriate PG&E or 3C-REN contacts, and these PAs will do the same if the reverse situation occurs.

It should be noted that CCR REN's Public program will not be offered in San Luis Obispo County.

CROSS-CUTTING – CODES AND STANDARDS

CCR REN: Codes and Standards Program (CCR-C&S-001)

Implementer: In Balance Green Consulting

The CCR REN's Codes and Standards program supports code enforcement agencies and better equips the building design and construction community to implement California's ambitious Building Energy Efficiency Standards (Title 24, Part 6 and Part 11), helping make buildings more efficient, paving the way for zero net energy building stock, and reducing energy use and greenhouse gas emissions in some of rural California's most climate-challenged regions. This will be accomplished through a broad range of educational trainings, field code support and technical assistance and ancillary offerings such as coordinated efforts regionally to engage in code cycle updates.

CCR REN will complement these resources with materials that address the regional characteristics of each area. The Codes & Standards program page on the CCR REN website will be home to relevant resources and links to other sites of value to local governments and building professionals, including case studies relevant to various rural regions, based on local characteristics such as climate zones, and will include pertinent information for local building officials and those who support code compliance and permit processing. Resources housed on or linked from the program page of the website will include energy code compliance resources (EnergyCodeAce.com), other relevant information including fire recovery updates, links to local ordinances that extend beyond Title 24 (LocalEnergyCodes.com), and information on zero net energy (ZNE) and ZNE-Ready buildings. As the program rolls out, there will be an emphasis on developing and translating program resources and materials to Spanish.

CCR REN will utilize materials that have already been developed by other Portfolio Administrators to ensure the efficient use of ratepayer funds, minimizing duplication and leveraging tactics that have proven successful.

Table 9: Compliance with REN Program Criteria: Cross-Cutting – Codes & Standards

REN Criteria	CRR-C&S-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A

2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	*NA*
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	CCR REN will focus program efforts across rural and hard-to-reach communities where enforcement and comprehension of Energy and CalGreen codes are needed most.

3C-REN: Energy Code Connect (TCR-CS-001)

The Energy Code Connect program offers local, in-person and on-line person-to-person trainings; Regional Forums; an Energy Codes Coach service that provides in-person, over the phone, and online expert assistance for energy codes and green building standards; and a HERS Rater training service to increase qualified raters in the region. The reach code support service has been suspended in the northern portion of the 3C-REN territory (PG&E) due to the Berkeley decision and the service is in the process of transitioning to new support service for jurisdictions. The target audience is all public and private sector building professionals impacted by energy code. This is a non-resource program.

Table 10: Compliance with REN Program Criteria: Cross-Cutting – ECC

REN Criteria	3C-REN TCR-CS-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	The 3C-REN program offers on-the-ground support for energy audits, data analysis to understand project opportunities for public and commercial facilities, as well as guidance in navigating the process of finding and applying for the appropriate program. 3C-REN will expand Santa Barbara County's current Energy Assurance Services program to cover the entire 3C-REN territory with a broader focus on public and commercial sector customers.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

PG&E Cross-Cutting Codes and Standards

PG&E and SCE: Codes and Standards Compliance Improvement (SCE-13-SW-008C and PGE21053)

Implementers: Energy Solutions, NORESCO, Gabel Associates, Lisa McLain, Selby Energy, Misti Bruceri and Associates

PG&E's and SCE's Compliance Improvement programs assist with improving compliance for both the California Energy Code (Title 24, Part 6) and select portions of the CALGreen standards (Title 24, Part 11), and California's Appliance Efficiency Regulations (Title 20). Compliance improvement activities complement advocacy work by enabling potential savings from C&S to be realized and persist over time. The Compliance Improvement program targets market actors throughout the entire compliance supply chain by providing needs-based tools, training, resources, and outreach. More information can be found at energycodeace.com.

PG&E and SCE: Codes and Standards Reach Codes (SCE-13-SW-008D and PGE21054)

Implementers: Frontier Energy, Misti Bruceri and Associates

PG&E's and SCE's Reach Codes programs provide cost-effectiveness research and analysis, model ordinance language, and other code development and implementation tools to local jurisdictions that are interested in pursuing local ordinances which extend beyond the state's minimum energy code requirements. The Reach Codes programs also address ordinances that extend over portions of the CALGreen standards (Title 24, Part 11), such as EV infrastructure requirements. More information can be found at localenergycodes.com and calgreeninfo.com

Codes and Standards Coordination

PG&E, CCR REN, and 3C-REN will approach C&S coordination with the goal of offering transparency through regular communication, efficiency through a collaborative approach to any shared resources, and support for the success of programs across the service area. PG&E, CCR REN, and 3C-REN will meet on an as-needed basis, with the goal of quarterly meetings, to coordinate C&S programs and will include discussion of each program at these meetings.

PG&E and 3C-REN will provide CCR REN with their respective lists of available C&S training, including those in development stages. Whenever feasible, CCR REN will leverage existing PG&E and 3C-REN curriculum and training by communicating training needs via email or in coordination meetings with the PAs. A clear chain of communication and identified contacts will be exchanged for the program. PG&E's Compliance Improvement team representative will provide a list of trainings to CCR REN on a quarterly basis, which is also available on the Energy Code Ace website.

Additionally, there will be a standing agenda item at PA meetings to discuss the topics of trainings in development, even if only at a high level. This will reduce the potential for duplication of efforts. Once CCR REN reviews this list, CCR REN will determine which existing offerings should be leveraged and coordinate with PG&E to deliver these resources. CCR REN will develop a quarterly calendar with dates of when these offerings will be delivered to various audiences in the region. This calendar will be shared with the IOU's and scheduled based on the availability and resource requirements. When CCR REN determines there is a training gap, CCR REN will develop additional training resources and communicate that to the IOUs, working to avoid duplication by leveraging any existing resources. PG&E will make CCR REN aware of resources available as courses are scheduled for delivery and new job aides (Energy Code Ace “resources” or “tools”) are developed.

The Statewide C&S Team’s annual training schedule is set at the beginning of the year and modified as building departments and other market actors request trainings. All offerings are posted on the Energy Code Ace website training page as courses are scheduled.

CCR REN’s C&S program will not be offered in San Luis Obispo County since the county is already served by 3C-REN’s C&S program.

Figure 2: CCR REN and PG&E Codes and Standards Program Focus

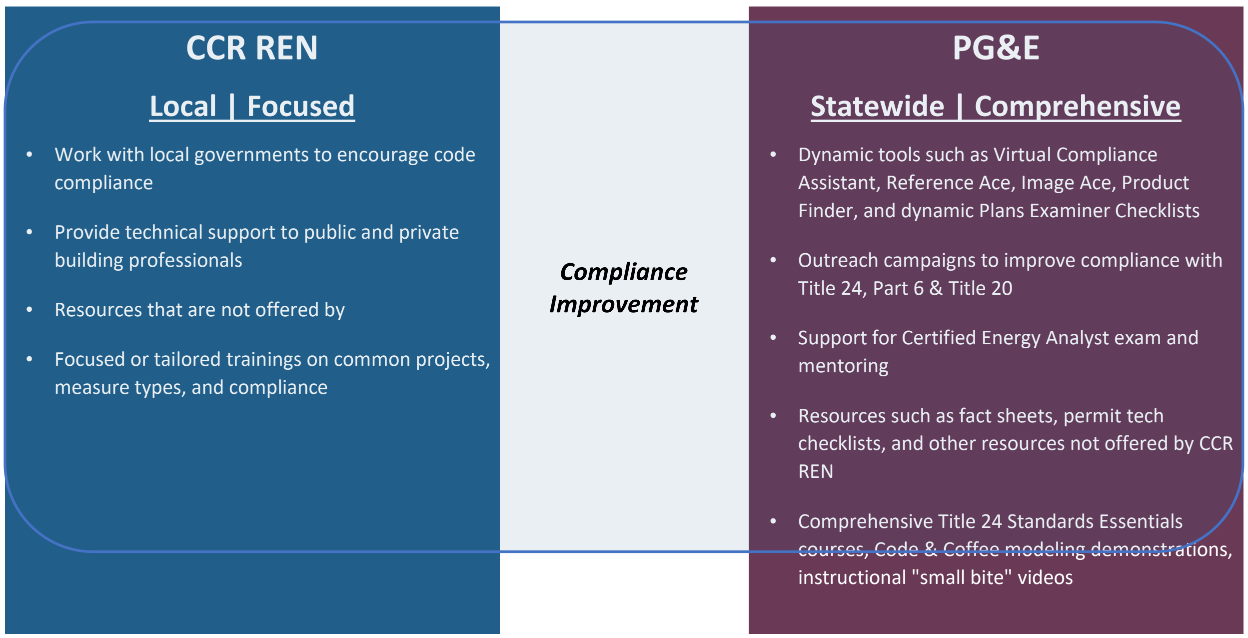
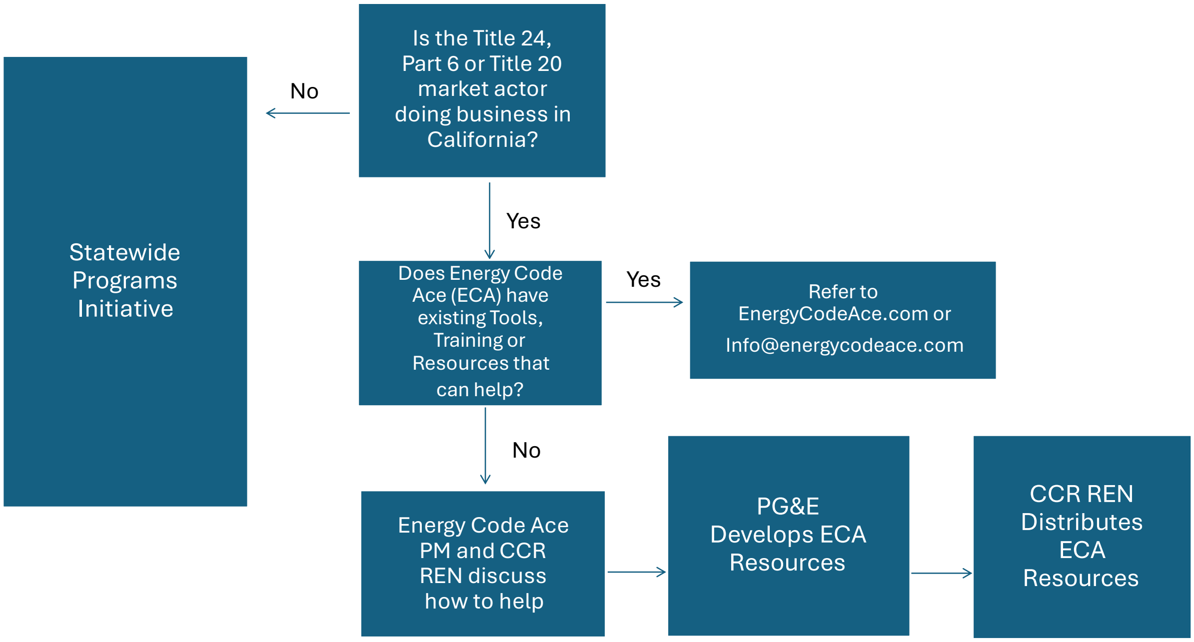


Figure 3: Coordination Protocol for Codes and Standards Programs



CROSS-CUTTING – WORKFORCE, EDUCATION, AND TRAINING

CCR-REN: Workforce, Education and Training Equity Program (CRR-WET-001)

Implementer: Rising Sun Center for Opportunity

The CCR REN Workforce, Education and Training (WE&T) program accelerates training (upskilling of existing workers and training for new workers) and increases employment opportunities. Seeking to address equity issues, access to, and awareness of energy-related careers, the CCR REN WE&T offering presents pathways to diffuse program benefits more equitably for hard-to-reach Californians. Program pathways are targeted broadly for disadvantaged workers, but specifically target returning citizens, veterans, opportunity youth, women, communities of color, and displaced agricultural workers.

The program addresses skills training, trades' advancement, and pre-apprenticeship placement and supports building professionals while coordinating with third-party program implementers and local employers to increase opportunities. It will support training for and employment of Energy Advisers to deliver parts of CCR REN Residential Equity and Commercial programs and upskill trades in the regions.

The program offers customized versions of in-person and virtual training curricula to best serve the populations in each specific region. Individuals are enrolled into the program pathway best suited for them, and training is delivered directly and/or in coordination with the CCR REN's community partners, ensuring the development of a well-trained and knowledgeable workforce that reflects their community's needs.

This program will create placement opportunities for program graduates in other CCR REN programs, and both the Clean Energy Academy and Climate Careers will offer pathways to employment in energy efficiency programs and the trades.

Table 11: Compliance with REN Program Criteria: Cross-cutting, WE&T

REN Criteria	CCR REN-WET-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	NA
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	NA
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	CCR REN's program will recruit students from disadvantaged, hard-to-reach and underserved areas exclusively.

Marketing and Outreach to HTR WET Customers:

CCR REN's Workforce, Education, and Training Equity program targets youth age 16-24 living in hard-to-reach rural areas, and/or disadvantaged and underserved communities which comprise the majority of CCR REN's service area. Specific marketing and outreach tactics will include:

- Placing ads in local print media such as newspapers and bulletins
- Distributing flyers and collateral through local governments and merchants
- Messaging via local social media and other online outlets

3C-REN: Building Performance Training (TCR-WET-001)

The Building Performance Training program supports building professionals and those seeking career pathways in residential and commercial design, construction, and related industries. Training is delivered locally and designed to meet the unique needs of the Tri-County region. The target audience is public and private building professionals needing more in-depth training in DACs and HTR areas, and educational institutions, as well as other key market actors. This is a non-resource program.

Table 12: Compliance with REN Program Criteria: Cross-cutting, WE&T

REN Criteria	3C-REN TCR-WET-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	The 3C-REN program offers on-the-ground support for energy audits, data analysis to understand project opportunities for public and commercial facilities, as well as guidance in navigating the process of finding and applying for the appropriate program. 3C-REN will expand Santa Barbara County's current Energy

	Assurance Services program to cover the entire 3C-REN territory with a broader focus on public and commercial sector customers.
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	N/A

PG&E WE&T Programs

PG&E: WE&T Integrated Energy Education and Training (IEET) (PGE21071)

Implementer: PG&E - Local

PG&E's local Integrated Energy Education & Training (IEET) program serves the incumbent energy efficiency, electrification and decarbonization workforce—people who design, build, maintain, or operate buildings and building systems—across several market segments, including agriculture, foodservice, commercial, industrial, and residential. IEET typically provides in-person and web-based education and training programs, collaborations with training partners including community colleges, and energy measurement tool loans.

PG&E: WE&T Career Connections (CC): Energy is Everything (EisE) (PGE_SW_WET_CC))[15]

Implementer: The Energy Coalition (TEC)

The statewide Career Connections third-party "Energy is Everything" (EisE) program helps to build the next generation of energy workers. EisE provides Kindergarten through Twelfth grade students the knowledge, skills, and abilities they need for college and career opportunities in the energy industry and motivates students to adopt pro-environmental behaviors. EisE incorporates career concepts for all learners, since early exposure to career options increases the chances of students pursuing and securing high-demand energy and STEM careers. Education providers targeted will primarily focus on those classified as "disadvantaged".

PG&E: WE&T Career & Workforce Readiness (CWR): Energize Careers (PGE_SW_WET_Work)[16]

Implementer: Strategic Energy Innovations (SEI)

Energize Careers aims to create a diverse and representational energy workforce through the economic empowerment of people who experience personal or systemic barriers to entering and remaining in the energy workforce. Energize Careers assists program participants in accessing technical training and energy career opportunities. Energize Careers provides holistic services to support disadvantaged workers through technical training, job placement, and wrap-around service support. Energize Careers collaborates with pre-apprenticeship programs, apprenticeship programs, community-based training organizations, and community colleges to provide technical energy job training to disadvantaged workers. Energize Careers also collaborates with wrap-around service providers and industry partners to provide people with services and support to enter career pathways where they can leverage their energy efficiency knowledge and skills.

The CWR program currently being implemented by SEI under the name Energize Careers is in ramp-down stage and will end in early 2026. The CWR program has been rebid and will launch in mid-2026.

Workforce, Education, and Training Coordination

PG&E, CCR REN and 3C-REN will approach WE&T coordination with the goal of offering transparency through regular communication, efficiency through a collaborative approach to any shared resources, and support for the success of programs across the service area. PG&E, CCR REN, and 3C-REN will meet on an as-needed basis, with the goal of quarterly meetings, to coordinate WE&T programs and will include discussion of each program at these meetings.

Meetings will focus on current programs, offerings, and regions. CCR REN will inform PG&E and 3C-REN of developed curriculum, impacts, enrollment, expansion, and coordination needs for offerings under the WE&T program.

CCR REN's WE&T program will not be offered in San Luis Obispo County since the county is already served by 3C-REN's WE&T program.

CROSS-CUTTING - FINANCE

CRR REN: Finance Equity Program (CCR-FIN-001)

CCR REN's cross-cutting Finance program will equitably support the residential, small/medium business (commercial) and public sectors in the CCR REN communities through low/no cost loans that will encourage and accelerate the implementation of energy efficiency projects. Loan products will address first cost and access to capital barriers that exist in rural California and will span gaps in current IOU and other statewide offerings. The program will offer bridge loans to complement and improve the effectiveness of IOU On-Bill Financing. Micro loans will fill a niche in the realm of currently available financing products for loans for energy efficiency upgrades below current minimum loan amounts, with easy qualifying and flexible repayment terms.

Bridge loans will provide CCR REN customers with the means of covering the cost of energy upgrade projects before other funding is received (which may include On Bill Financing (OBF), incentives/rebates, or other external loans, grants, or financing programs). In the case of OBF, bridge loans will bridge the time gap between time of approval for an IOU's OBF and the disbursement of OBF funds upon verification of the project installation by the OBF program. This gap, which can be months or in some cases a year or more, can be a significant financial hardship for cash strapped rural customers. Micro loans will allow customers to implement energy efficiency and decarbonization measures with no out of pocket cost.

Detailed design and implementation of the finance program will be outsourced to a third-party expert in energy finance and details of the program will be included in the Implementation Plan.

The Finance program is anticipated to begin ramping up in 2026 and be fully operational in 2027.

Table 13: Compliance with REN Program Criteria: Cross-cutting, Finance

REN Criteria	CCR-FIN-001
1. Activities that utilities or CCA PAs cannot or do not intend to undertake	N/A
2. Pilot activities where there is no current utility or CCA program offering and where there is potential for scalability	NA
3. Activities in hard-to-reach markets, whether or not there is another utility or CCA program that may overlap	Program to target rural and hard-to-reach residential and commercial customers.

PG&E Cross-Cutting – Finance Programs

PG&E: On-Bill Financing (PGE_OBFAP)

Implementer: PG&E

OBF is a key enabler of energy savings across customer classes, providing zero-percent financing for qualifying EE retrofits, with loan payments appearing as fixed monthly charges on the customer's PG&E bill. OBF helps customers, who would otherwise have difficulty qualifying for commercial credit, get over the first-cost hurdle to EE investment, unlocking broader and deeper cost savings while supporting PG&E's energy savings targets. More information to support customers can be found on the OBF Website[1418], including eligibility and application.

OBF relies on the development of the project by a Trade Professional enrolled in the PG&E Trade Professional Program or a PG&E Program Implementer. PG&E will work with the REN to train trade professionals in the region who have interest in developing OBF Projects

Statewide Financing

State of California: Go Green Financing

Implementer: California Alternative Energy and Advanced Transportation Financing Authority

GoGreen Financing is funded by PG&E (with other IOUs) to provide below market rate financing for residential and commercial customers. The program is operated by the California Alternative Energy and Advanced

[18] www.pge.com/obf

Transportation Financing Authority (CAEATFA)[19]*.* Reduced rate l*oans are provided by banks and credit unions* participating in the program *to support customers with their clean energy projects.*

Finance Coordination

Although CCR REN's finance program will not launch until 2027, CCR REN will coordinate with PG&E and 3C-REN on ramp up and launch activities when the time comes. At the time of the next JCM a robust coordination schedule will be agreed upon by PG&E, 3C-REN, and CCR REN to establish an agreed upon collaboration framework.

Cross-Cutting: Energy Assurance Services Coordination

Energy Assurance Services program participates in the Southern California Portfolio Administrator Sector Coordination (PASC) meeting for the Public Sector where IOUs and RENs participate and coordinate. 3C-REN will share the same information with PGE and CCR REN for this JCM and will join any meetings set up by this JCM. Where appropriate, 3C-REN can also provide updates to any other relevant sector program contacts.

THIRD-PARTY COORDINATION

PG&E may solicit third-party programs in addition to the programs noted above, which will be implemented by third- party implementers. PG&E will work with the third-party implementers to share relevant CCR REN and 3C-REN program information with program staff, to avoid duplication and streamline customer handoffs, in alignment with direction in D.23-06-055 that IOUs "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." CCR REN, 3C-REN, and PG&E will have regularly reoccurring meetings to develop and employ third-party implementer overlap practices – if relevant - to ensure that there are protocols for customer duplicative implementers.

PG&E sector leads and if deemed appropriate by the sector leads, the third-party implementers and CCR REN and 3C-REN program staff will present all available program options and evaluate customer needs on a case-by-case basis. If CCR-REN or 3C-REN encounter a customer that cannot be served through its program (perhaps due to geographical requirements), or that would be better served by PG&E third-party programs (perhaps due to customer size or project scope), they will hand off the customer to the appropriate PG&E contacts. If the third-party program encounters a customer that they cannot serve or that would be better served by CCR REN or 3C-REN programs (perhaps due to customer size or project scope), it will hand off the customer to the appropriate PG&E, CCR REN and 3C-REN contacts. CCR REN, 3C-REN,PG&E will have regularly reoccurring meetings to develop and employ third-party implementer coordination practices to ensure that there are protocols for customer handoffs.

[19] https://www.treasurer.ca.gov/CAEATFA/

PG&E provides solicitation schedules and updates at quarterly PRG meetings and CAEECC meetings. As third-party programs are negotiated and launched, an advice letter will be filed with the R.13-11-005 service list, as well as a public webinar invitation for all stakeholders to join and learn and comment.[20]

STATEWIDE PROGRAM COORDINATION

Statewide programs are currently administered by the IOUs and BayREN. One of the four large CA IOUs are included in this JCM. As a result, coordination protocols with each statewide program offered by the IOU included in this JCM have been discussed in the sector-specific sections above. For reference, the areas for coordination with statewide programs include residential, commercial and cross-cutting.

At this time, the parties have not specifically identified offerings in the 3C-REN and CCR REN residential and commercial program offerings are substantially similar [21]to any statewide programs; therefore, the parties to this JCM have determined that, at this time, regular coordination to avoid duplication is unnecessary. However, there are some aspects of the 3C-REN and CCR REN programs that may allow for and require coordination among programs. 3C-REN and CCR REN will provide referrals to statewide financing programs to program participants when appropriate. 3C-REN and CCR REN will also follow similar established coordination protocols for coordination with utility programs to ensure coordination with statewide programs.

The Statewide Programs available to customers are as follows:

Statewide Commercial Midstream Water Heating

Implementer: DNV Energy Systems USA (PA: SoCalGas)

A distributor-centric model design, which collaborates with a network of distributors that specialize in the sale of efficient natural gas and electric measures. Point-of-sale discounts and incentives are paid at

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[20] D. 18-01-004 : DECISION ADDRESSING THIRD PARTY SOLICITATION PROCESS FOR ENERGY EFFICIENCY PROGRAMS outlining the third-party solicitation process, was later amended by D.23-02-002 OP7 to allow single stage solicitations

[21] "Substantively Similar" was defined in the Joint-PA Tier 2 Advice Letter, filed October 1 2024, in compliance with D.23-06-055 OP32 (an extension from September 1, 2024 to October 1, 2024 was granted).
"Substantively Similar", per the Advice letter are programs in the same sector, segment, and PA territory, also meeting the following: For programs in the three segments below that meet the definition of Program Overlap, those programs are Substantively Similar if their characteristics (as listed below) are the same:

- Resource Acquisition: End use and measure(s) are the same.
- Market Support: Demand, Supply, Partnership, Innovation and Accessibility (sub-objectives from D.23-06-055)
- Equity: Addressing disparities in access, promoting

resilience, health, safety, affordability and or energy savings, reducing GHG and pollutant emission, and providing workforce opportunities. (Objectives from D.23-06-055) the midstream level to distributors based on transactions and sales to contractors. All customers with commercial rate structures served by one of the four IOUs are eligible for program participation.

More information can be found on the Program Website[22] or by contacting the lead IOU, SoCal Gas Company.

Statewide Upstream & Midstream Heating, Ventilation and Air Conditioning Program

Implementer: CleaResult (PA: SDG&E)

The Statewide Upstream & Midstream Heating, Ventilation and Air Conditioning Program, known as Comfortably California, is an upstream and midstream program that offers HVAC measures including high-efficiency commercial unitary air conditioners, commercial heat pumps, commercial chillers, commercial space heating boilers, residential air conditioners, residential heat pumps, residential gas furnaces and residential gravity wall furnaces.

More information can be found on the Program Website[23] or by contacting the lead IOU, San Diego Gas and Electric Company.

Statewide Foodservice Instant Rebates program

Implementer: Energy Solutions (PA: SoCalGas)

The Statewide Foodservice Instant Rebate Program, California Energy Wise, delivers natural gas, electric and water savings by offering midstream POS incentives for the sale and installation of high-efficiency commercial food service equipment via turnkey implementation services including participant enrollment and engagement such as; identify eligible program participants and advocates and leverage established relationships to enroll them in the program, and perform direct customer outreach to the chain restaurant, education, and grocery sectors along with HTR/DAC customers. Energy Solutions is the implementer of this program with partner Frontier Energy. The intent of the program is to move the instant rebates program beyond just the retail point of sale strategy to capture more supply chain to customer interactions. The program has its own set up rebates and spiffs (for participating supply chain companies) to encourage their promotion of the program and stocking of EE qualified products.

More information can be found on the Program Website[24], additionally the Qualifying Product List (QPL) and participating distributor lists are located on the California Energy Wise / Rebates page. The lead IOU for this program is SoCalGas Company.

Statewide Plug Load Appliance Program

Implementer: CleaResult (PA: SDG&E)

The Statewide Plug Load Application program, Golden State Rebate Program, provides instant rebates on energy-efficient products to help Californians save energy and live comfortably. Customers receive

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[22] https://www.statewide-waterheating.com/

[23] https://www.comfortablyca.com/

[24] https://caenergywise.com/rebates/

these rebates through coupons they can redeem in store or online at participating retailers. Eligible customers include:

- Residential customers
  - Customer must reside in a single-family, multi-family, or manufactured home.
  - Customer can be a homeowner or a renter. (Renter is responsible for obtaining the property owner's permission to install the product associated with the rebate.)

More information can be found on the Program website[25], or by contacting the lead IOU, San Diego Gas and Electric Company.

Statewide Home Energy Score Program

Partner: StopWaste (PA: BayREN)

Home Energy Score is a program of the U.S. Department of Energy. StopWaste is a Home Energy Score partner serving the San Francisco Bay Area in collaboration with BayREN. The Program provides training and access to the DOE Home Energy Score tool to qualified assessors to perform Home Energy Score assessments for qualifying homes in the San Francisco Bay Area. The Program also fulfills other DOE requirements for Home Energy Score partner organizations. More information can be found on the Program website[26], or by contacting the lead PA, BayREN.

[25] https://goldenstaterebates.com/

[26] https://www.bayren.org/

APPENDIX

Residential Segment Program Summary

Program Parameters	CCRREN [Residential Program]	PG&E [Energy Savings Assistance (ESA)]	*CA Energy Smart Homes Program* **Residential Resource Acquisition**	3C-REN [Home Energy Savings Program]
Eligible Customer (s)	*Hard-to-reach and disadvantaged residential customers*	*Single Family Residential, Mobile Home, and some in-unit not being treated by multi-family Single Family Residential, Mobile Home, and Multifamily, primarily 2-4 units.*	Single Family, Du plex, Townhome, Multifamily low-rise, Alterations, and Accessory Dwelling Units. Single Family Residential, low- to moderate-income households;	*Multifamily residential (5 or more units, existing buildings) customer segments in Ventura, Santa Barbara, and San Luis Obispo Counties; emphasis on targeting HTR residential customers, including renters and owners, and multifamily properties located in DACs* *Single-family residential customer segments in Ventura, Santa Barbara, and San Luis Obispo Counties; emphasis on targeting HTR residential customers, including renters and owners, and multifamily properties located in DACs*
Resource or Non-Resource	*Non-Resource*	*Non-Resource/Low-Income*	*Non-Resource (Market Support)* Resource Acquisition	*Non-Resource (Equity)*

Eligible Measures	*Home audits and energy efficiency DIY kits*	*Phone-based consultants/ in-person energy assessments* *Appliances: i.e. Refrigerators & High Efficiency Clothes Washers (Plus)* *Domestic Hot Water: i.e. faucet aerators, low-flow showerheads (basic), water heater tank and pipe insulation, and water heater repair and replacement (plus)* *Enclosure: i.e. Air sealing, attic insulation, and caulking (plus)* *HVAC: i.e. Furnace repair and replacement, heat pump replacement, smart thermostat, duct test and seal (plus)* *Maintenance: i.e. AC lifecycle refrigerant management (plus)* *Lighting: i.e. LEDs (basic)* *Miscellaneous: i.e. Pool pumps (plus), power strips (basic)* *ESA Main provides both basic and plus measures based on the home energy audits performed* *This is not a complete list of all of the measures that PG&E's ESA program*	**Program Requirements (depending on dwelling type):** -Communicating thermostats Induction cooking Heat pump water heating Heat pump space heating Segregated circuits Install a 240-volt plug for electric vehicle charging infrastructure Battery storage readiness Thermostatic mixing valves Heat Pump Drye Specific measures are still to be determined. General strategy is to drive comprehensive measure packages including building envelope, heat pump HVAC, heat pump water heaters.	*List of measures or n/a* • *Lighting* • *Appliances* • *HVAC* • *Plug Load* • *Refrigeration* • *Custom* • *Lighting Controls* • *HVAC Controls* • *Whole Building* • *Water Heaters*

		provides. For a comprehensive list please see: [Energy Savings Assistance (ESA), California Alternate Rates for Energy (CARE), and Family Energy Rate Assistance (FERA) Programs Annual Report Table 2]		
2024 Budget	*$1,141,875*	*$118,462,500 authorized*	*$12,846,232*	*Single Family $4,555,163.12* *Multifamily $3,623,054.65*
2025 Budget	*$3,745,125*	*$116,490,789 authorized*	*13,949,284*	*Single Family $4,810,270.76* *Multifamily $3,820,739.29*
2026 Budget	*$3,736,125*	*$ 114,909,676 Authorized*	*13,950,180*	*Single Family $4,869,279.43* *Multifamily $4,021,947.02*

Commercial Segment Program Summary

Program Parameters	**CCRREN [Commercial Program]**	**PG&E [AEP HiTech Biotech, HEFI Healthcare Fitness, Measured Savings for Summer Reliability, NetOne Commercial, Simplified Savings Micro & Small Customer**	**3C-REN [Commercial Energy Savings]**
Eligible Customer (s)	Micro, small, and medium commercial customers in hard-to-reach and disadvantaged communities	Commercial sector (micro, small, medium, and large customers), Healthcare, high-tech, and biotech,	*Hard-to-reach commercial customers in the Central Coast region who can benefit from energy efficiency incentives, technical assistance, and financing options."*

Resource or Non-Resource	*Resource*	Resource Acquisition	*Non-Resource*
Eligible Measures	*Lighting, domestic hot water, hvac, envelope.*	*See program details*	*List of measures or n/a* • *Lighting* • *Appliances* • *HVAC* • *Plug Load* • *Refrigeration* • *Custom* • *Lighting Controls* • *HVAC Controls* • *Whole Building* • *Water Heaters*
2024 Budget	*$63,940*	*17,089,434*	$2,032,783.08
2025 Budget	*$2,457,927*	*$ 23,694,480*	$2,043,526.65
2026 Budget	*$2,448,878*	*22,515,784*	$2,071,433.10

Agriculture Segment Program Summary

Program Parameters	**CCRREN [Agriculture Program]**	**PG&E [Agricultural Energy Savings Action Plan (AESAP) Program]**	**3C-REN [Agriculture Technical Assistance]**
Eligible Customer (s)	*N/A*	*All agricultural customers in the PG&E territory*	*Agricultural customers in Ventura, Santa Barbara, and San Luis Obispo Counties who need personalized, customized technical assistance to identify and implement energy efficiency measures and complementary programs.*

Resource or Non-Resource	*N/A*	*Resource*	*Non-Resource*
Eligible Measures	*N/A*	*EMS, ASD, VentFanMtr, OxyDemCtrl, Boiler_AF, TankIns, MatProcDrv, HeatRecov, GenPurpose, PosDisp, CentBstr, Centrif, Agitation, CentChlr, RefWareCool, RecipComp, Timer, LtSensor, OccSensor, LED_fixt, LED_lamp, PipeIns, IrrifSys, Building Envelope*	*N/A*
2024 Budget	*N/A*	*$8,498,660*	$421,338.07
2025 Budget	*N/A*	*$12,190,000*	$424,204.93
2026 Budget	*N/A*	*$10,460,000*	$424,268.60

Public Segment Program Summary

Program Parameters	**CCRREN [Public Program]**	**PG&E [Government & K-12 Program]**	**3C-REN [Energy Assurance Services -Cross-Cutting]**
Eligible Customer (s)	*Jurisdictions considered geographically hard-to-reach*	Local Governments, Public Agencies, Special Districts, K-12 Schools not exclusive to, but including Equity customers.	*Local technical support to commercial and public sectors; assistance to small and under-resourced jurisdictions, critical facilities, and community-serving locations*
Resource or Non-Resource	*Non-Resource*	Resource Acquisition	*Non-Resource*
Eligible Measures	N/A	HVAC, Lighting and controls, Retrocommissioning, behavioral strategies	N/A

2024 Budget	*$266,960*	$11,202,276	$685,000.00
2025 Budget	*$298,125*	$10,300,000.00	$685,000.00
2026 Budget	*$299,700*	$10,300,000.00	$785,000.00

Workforce Education and Training Segment Program Summary

Program Parameters	**CCRREN [WE&T Program]**	**PG&E [WE&T Integrated Energy Education and Training]**	**SW WE&T Career and Workforce Readiness (CWR)**	**SW WE&T Career Connections (CC)**	**3C-REN [Program]**
Eligible Customer (s)	*Hard-to-reach and disadvantaged communities and at-risk youth*	Incumbent and emerging workforce	Disadvantaged Workers	K-12 Students	*Local trainings and mentorship opportunities, including hard-to-reach workers and those identified as living in disadvantaged communities*
Resource or Non-Resource	*Non-Resource*	Non-Resource (Market Support)	Non-Resource (Equity)	Non-Resource (Market Support)	*Non-Resource*
Eligible Measures	*N/A*	*n/a*	*n/a*		*N/A*
2024 Budget	*$755,625*	~~$8,734,790~~			$1,923,427.15
2025 Budget	*$3,191,510*	$8,750,012			$2,045,086.98
2026 Budget	*$3,164,732*	$8,368,331			$2,225,700.45

Codes and Standards Segment Program Summary

Program Parameters	**CCRREN [C&S Program]**	**PG&E Compliance Improvement**	**3C-REN [Program]**
Eligible Customer (s)	*Public and private sector building professionals in geographically hard-to-reach and disadvantaged communities*	Market actors throughout the building industry supply chain, including: architects, designers, energy consultants, plans examiners, building inspectors and various trades	*Local person-to-person trainings, mentorship and in-the-field opportunities, reach code support, as well as over-the-counter and on-call expert assistance for C&S education and support*
Resource or Non-Resource	Non-Resource	Non-Resource (C&S)	*Non-Resource*
Eligible Measures	*N/A*	*n/a*	*N/A*
2024 Budget	*$584,400*	*$5,450,000*	$1,717,661.01
2025 Budget	*$792,000*	*$5,956,798*	$1,748,632.64
2026 Budget	*$787,730*	*$5,956,798*	$1,824,285.97

Finance Segment Program Summary

Program Parameters	**CCRREN [Finance Program]**	**PG&E [On-Bill Financing, GoGreen Financing]**	**3C-REN [Program]**

Eligible Customer (s)	*Brief description, e.g., "Renters and property owners of multifamily buildings with 5+ units"*	OBF: Non-residential customers in the micro, mid, small, mid-size and public sector. GoGreen: Residential customers through GoGreen Home.	*N/A*
Resource or Non-Resource	*Non-Resource*	*Resource / Non-Resource* Non-Resource (Market support)	*N/A*
Eligible Measures	*N/A*	For OBF - All energy efficiency measures currently listed in our catalog which may include, lighting, heating, ventilation, etcetera. Additionally Battery Storage and EV Charging Infrastructure For GoGreen Financing (residential and Business): Most clean energy technologies including energy efficiency, EV charging equipment, and solar/Storage	*N/A*
2024 Budget	-	OBF $60,000,000	*N/A*
2025 Budget	-	OBF $55,000,000 GGF: $4,000,000 in credit enhancements	*N/A*
2026 Budget	*$350,851*	Estimated: OBF: 60,000,000 GGF: $4,000,000 in credit enhancements	*N/A*