2024-2025
Joint Cooperation Memo

Pacific Gas and Electric Company (PG&E)

Bay Area Regional Energy Network (BayREN)

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1. OVERVIEW

The 2024-2025 Joint Cooperation Memo (JCM) between Pacific Gas and Electric Company (PG&E) and the Bay Area Regional Energy Network (BayREN) covers energy efficiency program activity and collaboration in program years 2024-2025, and includes the following information:

1. An overview of programs the two energy efficiency program administrators (PAs) intend to offer in overlapping areas[1]. Each program summary includes the current implementer (if known) for the program at the time this document was completed. The PAs acknowledge implementers may change over time.

2. An overview of coordination approach between the two PAs

3. A description of how BayREN's anticipated offerings satisfy the criteria for REN activities in California Public Utilities Commission (CPUC or Commission) Decision (D.) 12-11-015 and reaffirmed in D.19-12-021.[2]

BayREN and PG&E policy and program staff will meet regularly to ensure that cooperation, coordination, and the best service to joint territory ratepayers is realized. Meetings will occur virtually or in-person. Meetings may include discussions on customer choice, marketing, policy, and double dipping prevention. BayREN and PG&E have jointly determined a meetings schedule for 2024-2025. BayREN and PG&E will share the responsibility of scheduling and managing the program coordination meetings. Meetings occur for each set of programs: Residential, WE&T, Commercial, Public, and Codes & Standards. BayREN and PG&E will continue to cross-promote each other's programs as appropriate.

Since D.18-01-004, PG&E has closed many of its legacy programs and launched new local and statewide third-party programs. This JCM represents the current offerings to customers. PG&E is committed to communicating with BayREN in the regular meetings, and to provide updates on new programs which may open to customers.

[1] This memo includes budget forecasts for 2024-2025 that are outlined in PG&E' 2027 True Up Advice Letter (Advice 4814-G/7047-E) and BayREN's 2024-2027 True Up Advice Letter (AL#24-E)

[2] D.12-11-015, p. 17.

This JCM is structured as follows:

1. **BayREN Program Summary:** A description of each program BayREN will administer in 2024-2025, by sector. Since there is no comparable PG&E program to the Water Upgrades Save Program, details about this offering are listed in *Appendix B* only.
2. **PG&E Program Summary and BayREN Program Distinction:** Comparable or equivalent PG&E program(s) that summarize how the anticipated BayREN program is distinct from the anticipated PG&E program(s).
3. **Coordination Protocol Between Programs**: Coordination protocol between BayREN and PG&E.
4. **Data Sharing Protocol**
5. **D.12-11-015 Compliance:** Identifies how the BayREN program satisfies the criteria for REN activities established in D.12-11-015.
6. **Appendices:**
    a. *Appendix A:* Summary of REN compliance with D.12-11-015 for all planned programs
    b. *Appendix B:* List all programs BayREN currently anticipates offering in 2024-25, including information on draft budgets and measure eligibility.
    c. *Appendix C:* List all similar programs PG&E currently anticipates offering in 2024-25, including information on draft budgets and measure eligibility.

2. RESIDENTIAL – SINGLE-FAMILY

a. BayREN Program Summary

BayREN Home+ (BayREN08)

Implementer: CLEAResult

BayREN's Home+ Program, while currently available to all single-family residents, is targeted to hard-to-reach households defined as those with a moderate income and/or where a language other than English is spoken and/or households that fall within a pollution burdened area.[3] BayREN has redefined moderate income as households who do not qualify for income qualified weatherization programs[4] up to the moderate-income level per household by county designation.[5] A second aspect of underserved communities are households that primarily speak a language other than English. Historically, non-white, lower and middle income, and non-English-speaking households have been underserved by utility energy efficiency programs relative to other households.[6] Lastly, BayREN's single-family program will include households within a pollution burdened area as defined by CalEnviroScreen 4.0.

The CPUC D. 21-05-031 directed the energy efficiency PA's to segment their portfolios into programs designed for three purposes: resource acquisition, market support, and equity. In BayREN's 2024-2031 Business Plan, BayREN selected the single-family program within the equity segment. While Home+ already focused on equity portions of the population, in 2023, BayREN single-family began a program redesign process. The BayREN Single-Family Moderate-Income Market Characterization Study, completed in September 2018, identified key barriers to participation for the target market including financial barriers, low existing energy costs and expected savings, and renter status if applicable. The redesigned Home+ Program will offer more effective solutions to customers to overcome these barriers and will focus more intentionally on target communities to achieve resilience, health, comfort, safety, energy affordability, and/or energy savings through their home improvements. It intends to meet the hard-to-reach customers where they are in their energy journey and to offer affordable energy efficiency measures that are complementary to measures available through current mainstream program offerings. BayREN aims to incorporate clear metrics to quantify program outcomes. The redesigned program is anticipated to launch in the last half of 2024.

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[3] **Moderate income:** exceeds ESA-eligibility and less than 120% of county Area Median Income, per CA HCD. This market segment is chronically underserved with energy efficiency programs; **Limited English proficiency:** individuals who do not speak English as their primary language and who have a limited ability to read, speak, write, or understand the English language; **Pollution burdened households:** households in census tracts that score higher than 75th percentile statewide on pollution burden, as defined by CalEnviroScreen 4.0.

[4] For example, moderate income households that are above the eligibility requirements for the Energy Savings Assistance (ESA) Program.

[5] California Department of Housing and Community Development Income Limits, https://www.hcd.ca.gov/grants-funding/income-limits/state-and-federal-income-limits/docs/income-limits-2021.pdf

[6] J. Amann, C. Tolentino, and D. York, "Toward More Equitable Energy Efficiency Programs for Underserved Households", American Council for an Energy-Efficient Economy, 2023, p; M. Frank and S. Nowak, "Who's Participating and Who's Not? The Unintended Consequences of Untargeted Programs", American Council for an Energy-Efficient Economy, 2016, p2-5.

Until then, BayREN Home+ continues its current offering. An important program element continues to be utilizing the Home Energy Advisors. This service is essentially a call center that customers can access to speak with an Energy Advisor[7]. The Advisors assist both homeowners and renters and maintain a long-term relationship with the customers after they have assisted with the initial contact to see the customer through a full energy-efficiency journey. Energy Advisors also refer customers to complementary programs offered by utilities, Community Choice Aggregator (CCA) programs, Energy Watch and other implementers; the Advisors also help customers understand their financing options. Additionally, the Energy Advisors assist Home+ Participating Contractors with understanding program requirements and when needed, help mediate issues that may arise with the customer and contractor.

In 2024, BayREN's current Home+ Program will continue to use an engaged Home Energy Advisor to walk customers step-by-step through the process and to direct them to Participating Contractors[8] to deliver energy savings to households. BayREN will continue to develop relationships with organizations and media who serve non-English speaking communities through in language webinars, printed collateral, and information dissemination through trusted messengers as a means to reach this sector. The Home+ Program also coordinates closely with BayREN's Climate Careers program (see Section 3), which conducts virtual and in-home Green House Call visits. After completion of a Green House Call, the customer is directed to the broader Home+ Program offerings. As part of its redesign, BayREN anticipates there will be changes to the Energy Advisor and Participating Contractor details. The anticipated relaunch will be in the second half of 2024.

In 2024, the Home+ Program will continue to offer a menu of eligible measures including four fuel substitution measures: heat pump water heaters, heat pump heating and cooling, heat pump clothes dryers and induction cooktop/ranges. Customers can choose a single measure to upgrade, but they are encouraged to undertake multiple measures. These measures must be installed by a Home+ Participating Contractor, a group that is key to the program. Customers are encouraged to stack incentives when possible. BayREN will continue to coordinate closely with other program implementers, including Statewide offerings, to avoid double dipping of incentives and double claiming of savings, when territories overlap.

To further address financial concerns facing moderate income households, BayREN is considering offering an additional rebate for certain measures for this population. The exact amounts and income qualification verification methods have yet to be determined but will be coordinated with the low-income qualified weatherization programs to facilitate referrals between programs.

BayREN's contractor training is designed and in coordination with the Workforce Education and Training (WE&T) activities offered through the PG&E WE&T Program, to ensure that efforts are not duplicated. BayREN cross-promotes PG&E's online courses and trainings for contractors as educational resources for BayREN's Participating Contractor Network on BayREN's website and offers its one-on-one trainings on an as needed basis. In 2024, as part of the program redesign effort, BayREN will be evaluating and potentially redesigning its program offerings to contractors to be more in line with workforce development goals. We will continue to design in coordination with PG&E's WE&T Program.

The BayREN Regional Heat Pump Water Heater (midstream) Program, funded by a grant from the Bay Area Air Quality Management District until June 2021, will continue to operate under the BayREN Single Family Program through 2024-2025. The engagement with manufacturers and distributors and the

[7] Please note that PG&E also has a service called Energy Advisor, but it is unrelated to the BayREN offering.

[8] A Participating Contractor has successfully completed the BayREN two-day training, has submitted all required paperwork and has been onboarded into the program.

administration of the rebates provided by CCAs will continue in 2024-2025 and potentially expanded with more CCAs joining in the effort.

Like all BayREN programs, outreach in 2024-2025 will continue to be done primarily by local governments. This also allows for the seamless layering of other climate programs and activities including those offered by individual cities, counties and CCA programs. With more local government entities offering new fuel substitution rebates such as Redwood City and Albany and complementary programs developed by several of the CCAs such as moderate-income programs and on-bill financing, BayREN will continue to leverage and integrate those programs into one cohesive message based on the audience as they launch.

b. PG&E Programs Summary and BayREN Program Distinction

PG&E offers four programs for single-family customers; one targeting qualified income qualified homes, and three which serve moderate and market rate customers. These four programs are described in this section, and the differentiation of BayREN programs.

These are the offerings expected to be available in 2024-2025, and there may be changes pending program needs and results of the ongoing third-party party solicitations.

In addition, it is important to note the Statewide Programs that PG&E may not be the administrator but may need coordination. For example, the Statewide Plug Load and Appliance Program and Statewide Golden Rebates Program[9] that are managed by SDG&E provides rebates for certain measures.

PG&E Energy Savings Assistance (*No PG&E # is currently available)

Implementer: Various

PG&E's Energy Savings Assistance Program (ESA Program) provides energy efficiency services to income qualifying customers in single-family homes, multi-family buildings, 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.

BayREN's Home+ Program currently does not have an income qualification; however, it is anticipated with the redesign that BayREN will require income qualification for applicants stating they meet the moderate-income level requirement. These income levels exceed ESA eligible households. This is one of the proposed changes to the program. BayREN anticipates other changes, pending program needs and results of the community input process.

PG&E's current single-family residential offerings that serve moderate and market rate customers in the Bay Area are:

a. Virtual Energy Audit Program - HomeIntel Program
b. Home Energy Checkup
c. WatterSaver

[9] https://goldenstaterebates.com/

PG&E Virtual Energy Audit Program – Home Intel Program (PGE_Res_001b)

Implementer: Home Energy Analytics

PG&E offers a third-party P4P program in the Bay Area called HomeIntel (implemented by Home Energy Analytics). The Program offers free energy audits, education, and personal energy advisor services to residential customers throughout the Bay Area. The Program helps customers save energy in their homes, measured at the meter.

PG&E Home Energy Checkup (PGE_Res_002a)

Implementer: Oracle

PG&E offers an online Home Energy Check-up to all its residential customers (single-family and multi-family). It is an online questionnaire about their home that customers answer to better understand their energy usage. Customers who fill out the questionnaire are provided with a breakdown of their energy usage categories and energy savings tips and recommendations. Customers do not receive any rebates through this service.

PG&E WatterSaver (*No PG&E # is currently available)

Implementer: Association for Energy Affordability

Participants who enroll in WatterSaver can optimize their energy use and save money by connecting their water heaters, via internet or cellular, to the Program. WatterSaver automatically takes advantage of lower electricity rates, heating water at less expensive off-peak times of the day. Participants also receive a gift card for enrolling plus an additional gift card for each month of active participation. Enrolled customers will help increase electric grid reliability and support increased renewable energy generation like solar and wind power by shifting energy use to off-peak times. The goal of WatterSaver is to shift 2 MW of demand out of peak period by 2025.

Table 1: Summary of Similar BayREN and PG&E Single-Family Programs

	BayREN	Current PG&E Programs under BayREN Territory			
Program Name	**BayREN Home+**	**Virtual Energy Audit Program** (PGE_Res_001b)	**WatterSaver** *(*No PGE # is currently available)*	**Home Energy Checkup** (PGE_Res_002a)	**Energy Savings Assistance Program (ESA)** *(*No PGE # is currently available)*
Eligible Measures	Duct sealing, attic and wall insulation, HVAC equipment upgrades, Smart thermostats, gas storage water heaters and heat pump water heaters, heat pump clothes dryers, induction cooktop/ranges. Single measure upgrades allowed.	Online energy audit, detailed energy reports	Control of electric resistance and heat pump water heaters to shift water heater energy consumption outside of peak period.	Home Energy Checkup (HEC) is a behavior-based platform. Behavior related energy saving recommendations/ tips are provided to the customer based on how they complete the checkup.	Duct sealing, attic and floor insulation, HVAC equipment upgrades, Smart thermostats, water heaters and heat pump water heaters, pool pumps, Refrigerators, Washers, Air purifier and more.
Incentive	Bonus incentives are offered to downsizing equipment, combining shell and HVAC measures, building air sealing and CAS testing. Potential increased incentive levels for moderate income households.	Free energy analysis and personal energy coach	Enrollment gift card, monthly gift card for active participation to be paid out quarterly.	N/A	N/A
Savings Claim Type	Savings will be deemed per measure based in CPUC approved work papers.	Savings Claims use Normalized Metered Energy Consumption (NMEC) methodology	No official claimed savings. This is a pilot focusing on load shifting	Measure Package outlines the methodology for computing savings for this program.	Energy Savings are offered on a per-measure basis.

	BayREN	Current PG&E Programs under BayREN Territory			
2024 Budget	$8,500,593	$1,500,000	$6.4M (2021-2025 budget)	$1,024,045.72 -	104,331,278
2025 Budget	$8,507,221	$1,500,000	N/A	$1,024,045.72	102,061,789
Target Customer	Moderate-income households (owners and/or renters)[10], non-native English speaking and/or pollution burden households.	High energy users in all PG&E service territory, any income level	All PG&E service territory, any income level.	All PG&E service territory, any income level	All PG&E service territory. Households with an income at or below 250% of the federal poverty line.
Target Implementer	Specialty contractors	Individual customer	Individual customer	Individual customer	Individual customer
Resource/ Non-Resource	Resource	Resource	Non-Resource	Resource	Resource

Finally, PG&E is conducting a solicitation for a new residential equity pilot program that would potentially target one or more micro regions. Given the program will be third-party designed, the scope has not been fully defined yet. However, PG&E has identified market needs for building decarbonization support for low-middle income or hard-to-reach residential customers, including customers who reside in manufactured/ mobile homes. This pilot program is expected to launch in 2024. PG&E will coordinate with BayREN once program details have been finalized.

c. Coordination Protocol Between Programs

The BayREN Home Energy Advisor will continue to direct customers to PG&E who are interested in a PG&E program and/or if they are a better fit for their programs. PG&E will continue to direct customers to BayREN Home+ Program when it seems like the best fit for the customer.

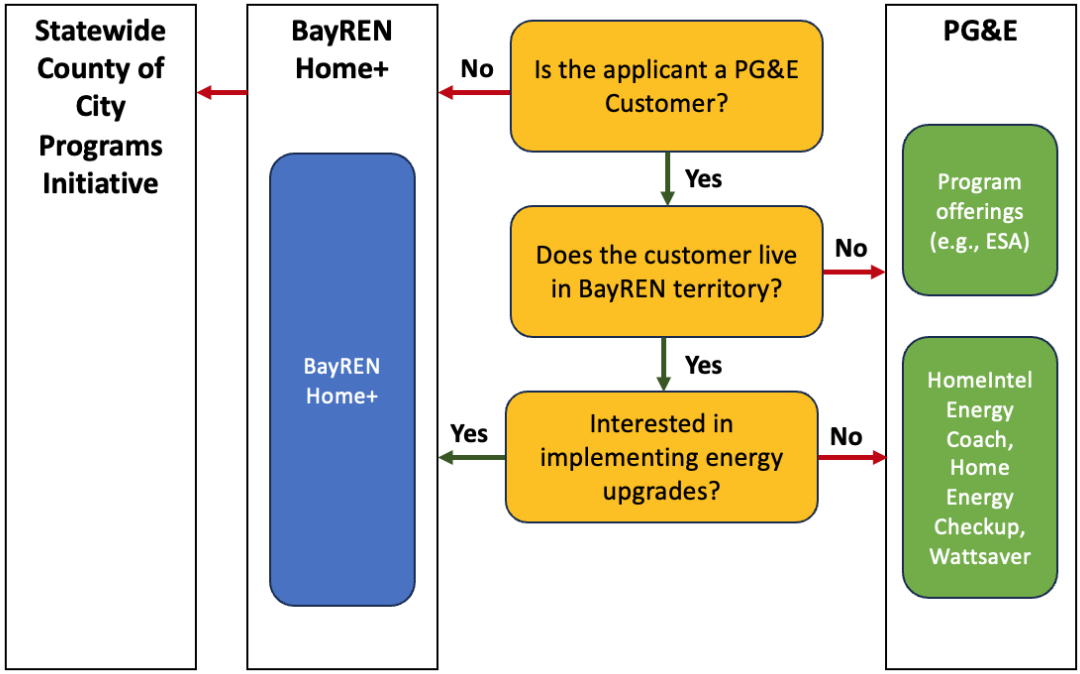
BayREN and PG&E's single-family residential teams will continue to hold regularly scheduled check in calls. Ad-hoc meetings will also be scheduled to accommodate the need to resolve any urgent issues that might arise. Standing agenda items include program updates, uptake, challenges, contractor issues, data sharing, double dip processes, and marketing campaign plans.

BayREN Senior Management Team and PG&E Program Coordination Team leaders will be included in regular check-ins on a quarterly basis (at minimum) to discuss ongoing collaboration and coordination.

d. Coordination Between SW Program(s)

The Statewide Plug Load and Appliance Program is led by SDG&E and may require an additional layer of coordination. PG&E will share any information about statewide programs that they may have from SDG&E that may overlap. However, BayREN is responsible for coordination with other Lead IOUs for relevant programs. Below provides an overview of the coordination protocol between BayREN and PG&E single-family programs.

Figure 1: Coordination Protocol between Single-Family Programs



e.12-11-015 Compliance

The following table describes in further detail how BayREN's Home+ Program satisfies the REN criteria in D.12-11-015.

Table 2: BayREN Home+ Program's Compliance with D.12-11-015

REN Criteria	BayREN Compliance
1. Activities IOU cannot or does not intend to undertake	34% of Bay Area single-family owners/renters comprise the defined moderate-income market. They do not qualify for ESA or other programs available to income qualified low earning households. PG&E offers downstream, direct install measures for low-moderate income customers, but these are distinct from Home+ because Home+ is not direct install and instead provides rebates for certain measures, which must be installed by a Home+ participating contractor. PG&E and BayREN will work together to determine if any changes to the offer that is being developed in the BayREN region will be/should be expanded to serve other customers.
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	Not applicable
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	The definition in D. 23-06-055 likely qualifies certain single family residential properties in the San Francisco Bay Area to be considered hard-to-reach (HTR).

f. BayREN Program Summary

Green Labeling (BayREN 07)

Implementer: Earth Advantage (HES) and Franklin Energy (trainings)

BayREN's Green Labeling focuses on two main activities: energy efficiency trainings for real estate professionals and promotion and support for the Home Energy Score (HES) as a simple home evaluation tool. BayREN offers an incentive for voluntary completion of scores (i.e., if not mandated by a local government, such as the City of Berkeley). PG&E does not offer HES. This BayREN offering provides other ancillary elements (e.g., follow up by an Energy Advisor), to enhance the outcomes and lead generation to an appropriate program for homeowners to make upgrades.

PG&E's WE&T Program does provide some energy efficiency trainings relevant to real estate professionals, and PG&E's trainings are scheduled in coordination with BayREN to ensure there is no duplication.

Table 3: Summary of Similar BayREN and PG&E Home Energy Score Activities

	BayREN	PG&E
Program Name	Green Labeling	Workforce, Education, and Training (WE&T)
Eligible Measures	N/A	N/A
Estimated 2024 Budget	$1,648,952	$40,000[11]
Estimated 2025 budget	$1,717,299	
Target Audience in 2024-2025	**Home Energy Score:** Bay Area Single-family homeowners with support through contractors, raters, and home inspectors **Real Estate Trainings:** realtors, appraisers, lenders, and underwriters. Specifically targeting real estate professionals who have already gone through a BayREN training to sign up for other offerings.	**Home Energy Score:** N/A **Residential Energy Efficiency and Decarbonization Trainings:** Realtors and appraisers as well as new construction and home performance workforce including contractors, architects, builders.
Resource or Non-Resource	Non-Resource	Non-Resource

[11] This is an estimated proportion of the WE&T Program budget, which would be used specifically for home performance training that may be relevant to real estate professionals in 2024-2025.

Green Labeling is a critical component of a comprehensive approach to achieve greater energy efficiency in California's homes, in accordance with Assembly Bill 758. BayREN's Green Labeling Program provides the following services:

- Promotes HES as a lead generation opportunity for energy upgrades and as a low-cost home label.
- Supports jurisdictions that may elect to adopt a mandatory ordinance based on HES.
- Offers an HES incentive for scores generated in the Bay Area, except where they are required by a jurisdiction.
- Sponsors training and certification for real estate agents, home appraisers, and lenders/underwriters in the nine-county Bay Area.
- Builds partnerships with local real estate professionals and associations of realtors to utilize and promote BayREN programs to clients.

g. PG&E Program Summary and BayREN Program Distinction

PG&E does not offer the HES. While PG&E does offer some trainings that are relevant to real estate professionals, they are distinct from those offered by BayREN. Below is a sample of the trainings being planned or considered by each entity based on the 2024-2025 program year.

Table 4: BayREN and PG&E Potential Trainings for 2024-2025

BayREN	PG&E
In Person Certification Trainings: **National Association of REALTORS (NAR) - Green Designation** National Association of Real Estate Brokers (NAREB) Realtor Trainings Accredited Green Appraiser	Home performance and electrification webinars and on-demand training for architects, designers, builders, HVAC contractors, home performance contractors (and some homeowners who are taking a DIY approach) which may also be of interest to realtors and appraisers.
In Person Classes & Events: Electrification for Real Estate Professionals Induction Cooking Demo for Realtors IRA Lunch & Learn Series Green Home Tours Green Real Estate Marketing Real Estate Professional Mentoring Meet & Greet Events with Contractors and Counties	

BayREN	PG&E
Virtual Certification Trainings: National Association of REALTORS (NAR) - Green Designation	
Virtual Classes: Green Real Estate Marketing Green Lending Hot Topics All About ADUs	

h. Coordination Protocol Between Programs

Since PG&E does not offer HES, there is no formal coordination protocol. However, PG&E does refer customers interested in a HES to BayREN.

BayREN and PG&E have coordinated on real estate sector engagement since 2013. Coordination on real estate education is part of PG&E and BayREN's recurring WE&T Programs coordination call. BayREN and PG&E representatives have also facilitated and participated in statewide real estate sector strategy conversations, including a statewide Green Real Estate Working Group comprised of representatives of utility companies, local governments, and green building and energy efficiency program implementers. BayREN and PG&E will continue to work together to ensure there are no duplicative offerings in the shared territory.

In 2024-2025, BayREN will continue to offer classes specifically aimed at real estate professionals (real estate agents, lenders, and appraisers). The majority of BayREN's classes will be in-person and focus on interactive experiences, networking, and relationship-building. Several virtual-only courses will be offered with no hybrid or on-demand options. Flagship offerings, like the NAR Green Designation are meant to draw in new participants and other, shorter classes are targeted at returning professionals who have previously taken one of BayREN's classes to further enhance these partnerships.

In contrast, PG&E's classes are targeted at a broad range of energy professionals, including real estate professionals. PG&E's classes are also not anticipated to be in an in-person format and instead will mostly be delivered live online or on-demand. In 2024-2025, BayREN and PG&E will continue to coordinate by ensuring that any classes targeted at realtors are scheduled at different times of the program year, marketing to different groups, and clarifying the titles and class descriptions to clearly delineate the content and audience for trainings.

There will be a standing agenda item on the PG&E and BayREN WE&T program coordination calls on real estate efforts and parties will share their respective training schedules as they are available to ensure there is no duplication of efforts.

i. Coordination Between SW Program(s)

N/A

j. D.12-11-015 Compliance

The following table describes in further detail how BayREN's proposed Green Labeling Program satisfies the REN criteria in D.12-11-015.

Table 5: BayREN Green Labeling Program's Compliance with D.12-11-015

REN Criteria	BayREN Compliance
1. Activities IOU cannot or does not intend to undertake	A. BayREN offers Home Energy Score through open-market assessors in the nine-county Bay Area. This supports jurisdictions that may be interested in voluntary disclosure programs or passing energy assessment and disclosure ordinances, similar to the City of Berkeley. B. PG&E does not offer Home Energy Score. C. BayREN's real estate classes are different classes than those offered in the PG&E WE&T program.
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	Home Energy Score is a scalable program, which is offered nationally by the US Department of Energy. BayREN began offering Home Energy Score as a pilot activity in 2016, when there was no utility program supporting it in California. BayREN also did a Home Energy Score pilot to support the City of Berkeley's adoption of a reach code for existing buildings.
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	N/A

3. RESIDENTIAL – WORKFORCE, EDUCATION AND TRAINING (WE&T)

a. BayREN Program Summary

Climate Careers (BayREN 09)

Implementer: Rising Sun

The BayREN Workforce Education and Training (WE&T) Program, Climate Careers, as implemented by Rising Sun Center for Opportunity (Rising Sun), seeks to address workforce needs and fill gaps in the labor market with a youth workforce development program that focuses on youth, ages 15-24, from low-income households and with an emphasis on opportunity youth. The Climate Careers Program offers opportunities to youth for personal autonomy, positive relationships with peers and adults, and a sense of meaning and purpose, all of which build resilience and prepares the new generation of workers.

Climate Careers Program offers no cost Green House Calls service to households. This service provides paid job experience for its youth participants. Climate Careers hires youth to perform residential energy and water audits. Green House Calls are offered to targeted households; primarily seniors and households where English is not the primary language. Green House Calls involve a program participant performing an assessment of a client's home and installing energy and water savings measures. Green House Calls directs customers to the broader Home+ program offerings, including the Home Energy Advisor service.

b. PG&E Programs Summary and BayREN Program Distinction

c. Coordination Protocol Between Programs

BayREN and PG&E's Workforce Education and Training (WE&T) Teams will continue to hold regularly scheduled check in calls. Ad-hoc meetings will also be scheduled to accommodate the need to resolve any urgent issues that might arise. Standing agenda items include program updates.

BayREN Senior Management Team and PG&E Program Coordination Team leaders will be included in regular check-ins on a quarterly basis (at minimum) to discuss ongoing collaboration and coordination.

d. Coordination Between SW Program(s)

N/A

e. D.12-11-015 Compliance

Table 6: Summary of Similar BayREN and PG&E Workforce Education and Training (WE&T) Activities

	BayREN	PG&E
Program Name	Climate Careers	Workforce, Education, and Training (WE&T)
Eligible Measures	LED lamps, water faucet aerators, low flow showerheads and Tier II power strips.	N/A
Estimated 2024 Budget	$2,797,251	$40,000[12]
Estimated 2025 budget	$2,978,516	
Target Audience in 2024-2025	Low to moderate-income households (owners and/or renters), seniors, non-native English-speaking households.	Home Energy Score: N/A Residential Energy Efficiency and Decarbonization Trainings: Realtors and appraisers as well as new construction and home performance workforce including contractors, architects, builders.
Resource or Non-Resource	Non-Resource	Non-Resource

[12] This is an estimated proportion of the WE&T Program budget, which would be used specifically for home performance training that may be relevant to real estate professionals in 2024-2025.

4. RESIDENTIAL – MULTI-FAMILY

a. BayREN Program Summary

Bay Area Multi-Family Building Enhancement (BAMBE) (BayREN02)

Implementer: Association for Energy Affordability

BayREN and PG&E both offer multi-family programs in the Bay Area, and through regularly scheduled coordination calls and cross referrals through the Single Point of Contact (SPOC), program administrators will work together to minimize duplication and direct participants to the program that meets their needs. While BayREN's energy efficiency and electrification rebate program can serve any multi-family project in the Bay Area interested in multiple measures, populations for which it has been difficult to obtain savings are prioritized.

The Bay Area Multi-Family Building Enhancement (BAMBE) program offers multi-family property owners willing to install energy efficiency and electrification upgrades a flat $500 per-unit incentive with significant adders and multipliers available to properties:

- Willing to electrify gas end uses
- That are deed-restricted properties
- In census tracts disproportionately burdened by air quality, heat, and housing costs.

BAMBE is accessible to all multi-family property owners except for 2–4-unit buildings without central heating or HVAC systems. BAMBE gives priority to deed-restricted properties and small to medium-sized market rate properties that may have had little interest or ability to undertake energy upgrades in the past. The Program supplies no-cost technical assistance (TA) to guide the property owner through the process from initial interest to project completion and quality assurance of the installed measures.

The BAMBE Program used to offer a Clean Heating Pathway designed for properties looking to demonstrate climate leadership by deeply reducing the carbon emissions through electrification of gas systems and appliances. In 2023, electrification became a core program offering and a separate pathway was no longer needed.

BayREN launched a new incentive structure in 2023 aimed at providing increased levels of funding for multi-family properties in census tracts disproportionally experiencing burdens related to air quality, heat, and housing costs. Additionally, in 2024 and beyond, BAMBE will officially be an Equity Program as outlined in D.23-06-055[13] and the approved BayREN 2024-2031 Business Plan[14]. PG&E's Energy Savings Assistance Common Area Measures (ESA CAM) program is specifically for deed-restricted, multi-family buildings.

PG&E's Multi-Family Energy Savings Program (MESP) sunset in June 2023 and is no longer accepting applications.

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[13] Link to D.23-06-055 on CPUC website

[14] Link to BayREN 2024-2031 Business Plan

BayREN also provides a Loan Referral Service (LRS) that directs property owners to appropriate sources of financing including but not limited to private sector financing products, PG&E's OBF Program (described below), and CAEATFA's GoGreen Financing.

Table 7: Summary of Similar BayREN and PG&E Multi-Family Programs

	BayREN	PG&E	PG&E
Program Name	Bay Area Multi-Family Building Enhancement (BAMBE)	California Energy Smart Homes (PGE_SW_NC_Res_electric)	Energy Savings Assistance – Northern Multi-Family Whole Building (ESA - Northern MFWB)
Eligible Measures	Envelope, HVAC, DHW, lighting, and appliance measures – requires multiple measures, minimum 10% modeled savings	HVAC, DHW (heat pump), and appliance measures, with required whole building gas replacement and removal. [15]	Envelope, HVAC, DHW, lighting, appliance, pool pump and heater, electrification measures – requires multiple measures
Estimated 2024 Budget[16]	$8,450,550	All Electric Statewide: $ 3,688,153* PG&E portion of statewide total budget	$44,512,082
Estimated 2025 budget	$8,488,626	All Electric Statewide– $4,004,840* PG&E portion of statewide total budget	$45,847,446
Target Audience	Bay Area multi-family property owners and managers requiring a higher level of program assistance, populations disproportionally burdened by air quality, heat, and housing costs, and owners/managers pursuing gas-to-electric upgrades.	Statewide, covering PG&E, SCE, and SDG&E service territories. Serves single-family, duplex, low-rise multi-family, and alterations/additions subsectors.	In PG&E service territory Multi-family properties with at least five units. Deed-restricted multi-family property where at least 65% of residents meet ESA low-income criteria and non-deed-restricted multi-family property owners where at least 80% of residents meet ESA low-income criteria. Both property owners and tenants are eligible
Decisions/ Proceedings	Decision 23-06-055		Decision 21-06-015
Market Rate/Low-Income	Both		Low Income
Resource/ Non-Resource	Resource	Non-Resource (Market Support)	Resource

[15] PG&E expects the list of eligible measures to change in 2024-2025 with the updated Title 24 code requirements. PG&E will keep BayREN updated on program changes as the program evolves.

[16] The 2024-2025 budget listed for the California Energy Smart Homes (Mixed-Fuel, All Electric) programs is a Statewide budget; PG&E, SCE, SCG, and SDG&E contribute funds proportionate to their respective service territories.

b. PG&E Multi-Family Program Summary and BayREN Program Distinction

California Energy-Smart Homes Program (CESHP) (PGE_SW_NC_Res_electric)

Implementer: TRC

The 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.

The California Energy Smart Homes Program (CESHP) influences the decision and eases the transition to adopt all-electric new construction practices and alterations projects by educating potential participants and stakeholders on the features of all-electric homes, enrolling projects, emphasizing the installation of advanced energy efficiency measures, and facilitating future opportunities through non-incentivized prerequisite measures that position homes to install high-impact demand response technologies more regularly in the future. In addition to a robust new construction incentive offering, the Program also focuses on whole building electrification alterations for multi-family low-rise projects.

Energy Savings Assistance – Northern Multi-Family Whole Building (ESA - Northern MFWB) (*No PG&E # is currently available)

Implementer: Various

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 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 On-Bill Financing (OBF) (PGE21091I)

Implementer: PG&E

The On-Bill Financing (OBF) Program provides qualified PG&E customers 0% interest loans for energy efficiency retrofits; loans are repaid on PG&E bills. Projects can receive this financing without participating in an incentive program, or in addition to BAMBE incentives. Projects in the BAMBE pipeline interested in

OBF will be screened by BayREN and referred to the PG&E Single-Point of Contact (SPOC) for assistance with the OBF application process. For more information about PG&E OBF Program, visit www.pge.com/obf .

BayREN will continue to coordinate with the SPOC to refer eligible projects to ESA CAM, Northern MFWB Program, CESHP, and to provide On-Bill Financing (OBF) services to multi-family properties with central systems on commercial rate plans.

c. Coordination Protocol Between Programs

PG&E and BayREN implementation teams coordinate program design and customer referral to minimize duplication and optimize the customer experience and ratepayer resources:

- Regularly scheduled coordination calls or in-person meetings between BAMBE and CESHP: BayREN and PG&E are committed to continue regular coordination on program design and delivery. Regularly scheduled calls between BAMBE and PG&E program leads occur to work through program developments and improve on the customer experience. In the coordination calls, CESHP ESA Northern MFWB, and BAMBE teams will keep each other apprised of outreach/marketing plans and double-dip prevention. Team will actively discuss SPOC referrals, and opportunities to reduce customer confusion through active program coordination.

- Annual in person meeting in June, rotating yearly between locations picked by BayREN and PG&E

- Customer referral: The PG&E SPOC and the BayREN technical assistance provider use a decision-making tree (below), that defines when a project is a best fit for each program. The teams have agreed-upon referral protocols to make hand-offs seamless and to minimize loss of participant engagement. The tree is revisited each year.

- CESHP, ESA Northern MFWB and BAMBE have agreed that customers who cannot participate in a minimum number of measures through BAMBE will be referred to SPOC so that they can then be referred to CESHP or a better suited program that meets customer needs and requirements. Conversely, CESHP will refer customers to SPOC for BAMBE or other program participation in cases where projects do not meet program cost-effectiveness requirements.

- BAMBE will refer low-rise multi-family (2-4 units) without shared central DHW or HVAC systems to CESHP, as CESHP covers the gap between single-family and larger multi-family projects.

- PG&E and BAMBE will also explore opportunities for incentive layering between programs to maximize project savings.

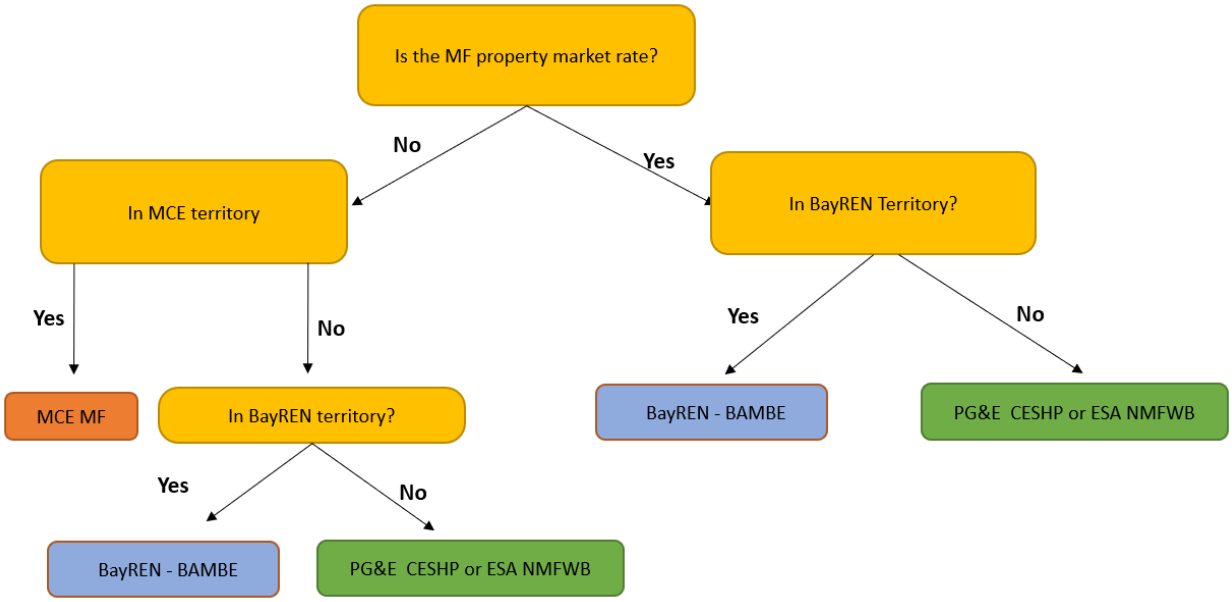
- Financial offerings: Financing resources from PG&E and BayREN will be open to both BAMBE and SPOC participants. PG&E's SPOC Program also refers multi-family owners and residents to their potential qualifying financing resources. PG&E's On-Bill Financing will accept and review both PG&E and BayREN projects.

Figure 2 provides an overview of the coordination protocol between PG&E and BayREN multi-family programs. The figure includes how both PAs will coordinate with MCE[17] multi-family offerings. The decision tree can be used to provide direction if a customer needs assistance finding a program that

[17]MCE's territory overlaps with both BayREN and PG&E in Marin, Napa, Contra Costa, and Solano counties.

supports their needs. PG&E/BayREN referrals will take place through the SPOC. As PG&E's CESHP and ESA MFWMB programs evolve and mature in the market, coordination will evolve. PG&E and BayREN will work with the SPOC such that customers can be referred to programs that are best suited for their needs. Projects in shared PG&E/BayREN territory that have multiple measures and meet IOU cost effectiveness requirements will remain with the program that initiated the project.

Figure 2: Coordination Protocol for Multi-Family Programs



d. D.12-11-015 Compliance

The following table describes in further detail how BayREN's Multi-Family Program satisfies the REN criteria in D.12-11-015.

Table 8: BayREN Multi-Family Program's Compliance with D.12-11-015

REN Criteria	BayREN Compliance
1. Activities IOU cannot or does not intend to undertake	BayREN is focused on serving multi-family owners that have more comprehensive energy efficiency and electrification scopes of work and need more personal attention and assistance to participate in energy efficiency programs. BayREN also provides increased incentives for customers pursuing electrification measures and for projects serving populations disproportionally burdened by heat, air quality, and housing costs.
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	N/A
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	The definition in D. 23-06-055 may allow certain Bay Area multi-family properties to be considered hard-to-reach (HTR) if language and income criteria are also met. [18]

[18] D.23-06-055 – Section 7.3 Modifications to "Hard-to-Reach" Definition, page 53 and 54

5. COMMERCIAL

a. BayREN Program Summary

The BayREN Small and Medium Commercial Buildings (SMCB) Program consists of two subprograms: BayREN Business and BayREN Refrigerant Replacement (BRRR).

BayREN Business (BayREN06)

Implementer: Recurve Analytics and San Francisco Environment Department

BayREN Business, is a resource acquisition program that deploys population-level, normalized metered energy consumption (NMEC) approach. BayREN Business underwent changes due to the pandemic's impact. It now operates with multiple installation contractors – or aggregators - through Recurve's Demand FLEXMarket (FLEXMarket) since its relaunch in December 2022. This transition enabled BayREN Business to collaborate with multiple aggregators (installation contractors) to provide whole-building energy efficiency solutions for properties consuming 150,000 kWh or less and 50,000 therms or less annually.

Using data-driven targeting, BayREN Business identifies eligible customers and offers comprehensive technical assistance and bundled measure packages tailored to their needs. Target sectors include retail, professional offices, restaurants, gyms/multi-use buildings, auto services, and grocery/convenience stores.

Additionally, BayREN Business continues to offer energy-efficiency support and incentives for hard-to-reach (HTR) businesses with energy consumption within the specified thresholds. Collaborating with multiple aggregators, the BayREN Business staff ensures that business and property owners receive focused technical assistance aimed at bundling cost-effective energy efficiency measures.

The key differentiators for the BayREN Business Program from all but PG&E's Simplified Savings Program include:

A. a specific focus on HTR businesses with energy use of equal or less than 150,000 kWh and equal or less than 50,000 therms annually.

B. an incentive structure that provides an advance payment as well as quarterly incentives based on metered savings in compliance with the Commission's latest NMEC Rulebook (version 2.0).

C. must have at least 12-months of energy consumption data *and* the data must meet a goodness-of-fit criteria.

BayREN Refrigerant Replacement (BRRR) (BayREN10)

Implementer: San Francisco Environment Department

BayREN Refrigerant Replacement (BRRR) is a direct-install, equity program that focuses on replacing environmentally harmful refrigerants with less harmful refrigerants, including natural refrigerants. It also advances refrigeration energy efficiency retrofits using a direct-install approach where the participating business pays little to no out-of-pocket costs. Furthermore, BRRR provides participating businesses with resources to sustain refrigeration maintenance and tracking their systems' energy consumption.

Like BayREN Business, BRRR will focus on serving small food-service businesses which meet an energy threshold eligibility criterion.[19] Examples of small food services include sit-down and take-out restaurants, small grocery and corner stores, bars, and community kitchens.

Along with fixing refrigerant leaks and replacing environmentally harmful refrigerants to reduce greenhouse gas emissions, BRRR will provide technical assistance and deemed energy efficiency incentives to serve small food-service businesses meeting an energy threshold criterion like BayREN Business.

BRRR will contract with up to three refrigerant contractors to provide program services throughout the Bay Area. They will fix leaks, charge systems with environmentally friendlier refrigerants, and directly install energy efficiency measures. BRRR staff will provide maintenance training, tools, and reminders to sustain the benefits from the completed projects.

The PG&E Simplified Savings Program, launched August of 2023, also targets micro and small customers, and will be described in more detail in Section C below. Regularly scheduled check-ins with the BayREN and PG&E staff between these two programs will be standard procedure.

Coordination with PG&E, as well as any regional SMB and third-party implementers, will be incorporated into the latest Implementation Plans to reduce any possible customer confusion and avoid double-dipping if a customer was previously served (although this is unlikely due to BayREN's targeting focus). Table 9 provides a summary of BayREN and PG&E programs that will continue in 2024. Table 9: Summary of Similar BayREN and PG&E Small and Medium Commercial Buildings Programs.

Table 9: Summary of Similar BayREN and PG&E Small and Medium Commercial Buildings Programs.

	BayREN	PG&E
Program Name	• BayREN Business • BayREN Refrigerant Replacement	• Commercial Deemed • Commercial Calculated • Simplified Savings Micro & Small Business Customer Program • CoolSave Grocery Comprehensive Retrofit and Commissioning • Advanced Energy Program for High Tech and Biotech • Healthcare Energy Fitness Initiative • SmartLabs Program - Energy and Ventilation • NetOne Program - Comprehensive Commercial • RAPIDS Wastewater Program (Public Sector) • Government & K-12 Schools Program (Public Sector)

[19] At the time of writing, the BRRR program is still being developed. The final energy threshold criterion will be added to the next JCM.

	BayREN	PG&E
Eligible Measures	• Energy management control systems; • Building envelope modifications; • Electric motors and drives; • Energy related process Improvements; • Lighting Improvements; • HVAC maintenance and replacement; • Appliance and plug-load reductions; • Refrigeration & Food Service Equipment Improvements • Direct replacement with synthetic and natural refrigerants • Refrigeration system maintenance training and tools	• Chilled water, hot water, and steam distribution systems • Chiller and boiler plant improvements • Lighting improvements • Refrigeration equipment • HVAC maintenance and replacement • Food service equipment • Pump controls, upgrades
Estimated 2024 Budget	$8,044,952	$ 21,528,575
Estimated 2025 budget	$9,343,113	$ 23,392,135
Target Audience	Business and property owners and managers of HTR and small food-service businesses in the Bay Area with eligible annual energy consumption, and their contractors.	• Regional SMB for small and medium customers >50,000 sq-ft • Hospitality/Hotels, chains • Groceries all sizes, focused on refrigeration. • Healthcare facilities all sizes • Commercial and institutional laboratories and high tech • Commercial real estate and retail all sizes • Local government facilities and publicly funded K-12 and charter schools • Commercial real estate and retail all sizes • Deemed and calculated programs have no size or segment restrictions • Non-state government funded wastewater facilities
Resource/Non-Resource	• BayREN Business: Resource • BayREN Refrigerant: Equity	Resource

b. Comparable and/or Equivalent PG&E Program

PG&E programs which serve small and medium customers are described below.

Simplified Savings Micro/Small Equity Program (PGE_Com_SmallBiz)

Implementer: Resource Innovations

Simplified Savings targets Micro and Small Businesses (MSB) within Disadvantaged Communities and/or Hard-to-Reach customers located in DAC areas or qualifying for HTR. The Program outreach is primarily undertaken by participating small contractors from the target area as well as through Community Based Organizations. Eligible customers must receive gas or electric service through a PG&E meter, have a demand of 50 kW or less, and not have more than 10 sites in their ownership group. Program offers energy efficiency training and audit, select direct install measures, as well as any active deemed measures in the current PG&E catalog. Trade Allies will be recruited for work in their own communities, be training in the Direct Install and Add On Opportunity the program offers and be provided with electronic site audit training and tools resulting in an immediate list of options for each customer location. It is intended that customers who participate in the education, training, and behavioral coaching they receive to be prompted to take further equipment and measure related steps for bill reduction. Bill reduction and customer engagement are the primary measures of success. Energy savings will be tracked, but the focus of the program is to engage micro and small customers for the primary goal of no cost behavioral changes, education on this and related programs for Micro and Small customers, engagement of more customers with their local CBOs for resources, longer term impact for bill reduction, and possible enrollment in the California Green Business Network.

CoolSave Grocery Retrofit & Commissioning Program (PGE_Com_001)

Implementer: KW Engineering

CoolSave is a comprehensive retrofit and commissioning program that targets the energy-intensive supermarket sector. It is an innovative, pay-for-performance, efficiency and demand response (DR) program. The program provides technical assistance and incentives for participants, via two program pathways:

- Comprehensive retrofits with significant capital investment (CapEx Projects)
- Low-cost retro-commissioning and minor equipment retrofits (OpEx Projects).

Grocery stores can receive up to $2,000 for OpEx energy-saving solutions and $0.12/kWh saved for CapEx projects (capped at 100% of project cost).

The program applies a site-level normalized metered energy consumption (NMEC) approach, quantifying energy consumption at the building's electricity meter. The program delivers cost-effective capital, retro-commissioning, and demand-response results to medium and large-size grocery and retail chains with grocery segments. The program addresses a wide array of end-uses including commercial refrigeration, controls, HVAC, lighting, cooking, and packaging but is specifically targeted at improving refrigeration and refrigeration controls.

CoolSave provides free technical assistance and financial incentives to eligible mid-size and large grocers. Free store energy scoping studies and implementation support make projects easier and more successful. No-cost services provided to the customer include:

- Project Scoping,

- Savings Analysis
- Retro-Commissioning
- Technical Assistance
- Commissioning
- Demand Response Integration
- Financing Support (via On-Bill-Financing).

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.

SmartLabs Program (PGE_COM_002)

Implementer: KW Engineering

The Smart Labs Program provides an innovative delivery approach to medium to large commercial and institutional laboratories with an emphasis on advanced control of ventilation and HVAC systems. The Program focuses on providing laboratory owners with expert assessments resulting in reduced overall ventilation rates to achieve energy savings. The Program also includes the development of a performance management plan for the facility to ensure that the systems continue to operate optimally and that changing facility needs are properly managed.

The Smart Labs Program targets energy reductions through a clear process of assessment, planning, and execution. Each lab is unique, but the process is replicable, scalable, and proven. The process begins with a brief scoping study to determine program fit, with selection based on building characteristics and participant engagement. Once selected, the Team follows 3Flow's Smart Labs assessment methodology to develop recommended measures. The Program then provides incentives and technical assistance to install and commission the measures. Finally, the Team provides ongoing measurement and verification as well as tailored lab performance management plan to ensure project success and savings persistence.

Smart Labs Program specializes in ventilation systems for laboratory buildings, the program provides lab owners with expert technical assessments to optimize HVAC, ventilation, and air circulation system performance and associated energy savings, the development of a performance management plan for

the facility allows for the persistent safe and efficient operation.

Program Participants will receive extensive risk assessment services and audits that establish the foundation for adjustments to ventilation, fume hoods, and controls, expert technical assistance during the implementation phase, and performance-based incentives to drive participants to complete projects and maintain efficient operation during the 12-month performance period.

This Program focuses on an NMEC approach but will consider capital projects on a limited basis for lighting and refrigeration measures.

Advanced Energy Program for High Tech and Biotechnology (PGE_Com_004)

Implementer: Resource Innovations

The Advanced Energy Program is a customer-centric demand side management (DSM) program offering tailored 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.

NetOne Commercial Program (PGE_Com_003)

Implementer: Ecology Action

The NetOne Program is designed to serve customers with over 20kW annual usage, with a primary focus on the commercial sector including large offices, large retail, grocery, food storage, warehousing, multi-use buildings, and restaurants. NetOne utilizes both Population and Site-based normalized metered energy consumption platforms (NMEC) as well as supporting measures through the deemed workflow. Some of the target measures are Interior and Exterior Lighting, ASH Control, Refrigerated Case Doors, Heat Pump Water Heaters, and HVAC Controls.

NetOne is a direct install program that works directly with customers or through our trained Contractor Partner network. NetOne offers a full suite of services including, technical and engineering support, project management, On-Bill Financing (OBF) rebate/incentive processing, and both Population and Site NMEC pathways. NetOne has a specific focus on the Medium to Large Commercial Sector and Multi-site customers and serves the entire PG&E territory.

RAPIDS Wastewater Program (PGE_SW_WP)

Implementer: AESC

The RAPIDS Program targets energy efficiency in public and private sector wastewater treatment and collection systems. The RAPIDS team of wastewater and energy efficiency experts collaborate with plant operators and decision-makers to provide solutions for improving plant efficiency while maintaining plant operation and reliability. Offering a wide range of process and technical expertise combined with incentives and financing, the program strives to achieve drive deep, persistent, and long-lived energy savings. Additionally, the program considers the cascading effects of measures, including downstream energy, process, and operational implications.

Late in 2022, this Program ceased soliciting new projects with the launch of a Statewide wastewater program. The RAPIDS Program will continue working to obtain commitments for projects already proposed and to complete committed projects through 2024-2025.

Government and K-12 Schools Program (PGE_Pub_009)

Implementer: Willdan

The Government and K-12 Energy Efficiency (GK12) Program is a comprehensive program that serves local government, local educational agencies, and federal customers of all sizes. GK12 operates across PG&E's entire territory.

GK12 uses deemed, custom, and NMEC platforms to deliver total system benefits. Targeted measures include fuel substitution measures such as Heat Pump Water Heaters and larger long lead custom projects, lighting through On-Bill Financing, retro-commissioning, and energy master planning and implementation across building portfolios. GK12 goes beyond energy savings to include integrated Demand Response with fuel substitution and fully Integrated Demand-Side Management solutions that deliver permanent peak load shift and reduction. GK12 provides both a turn-key direct install offering and a pathway for government agencies to access services while taking a traditional procurement approach. The Program includes embedded QA/QC and M&V throughout program steps.

Commercial Deemed Incentives Program (PGE21012)

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.

Commercial Calculated Program (PGE21011)

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 launched a meter-based incentive channel as a subprogram of this calculated incentive program. The subprogram will initially be focused on sites that are at least 50,000 sq-ft and will incorporate site-specific NMEC-based performance incentives for capital retrofits, retro-commissioning, and behavioral and operational bundled projects.

Using the “2024 Commercial Sector Referral Tree in Figure 3, the BayREN Building Performance Advisor will make appropriate program referrals after obtaining preliminary site and project information. The BayREN and PG&E program teams will conduct regularly scheduled check-in calls with regular agenda items that include notice of marketing campaigns, continued coordination, discussion of any issues impacting the programs, and to learn about updates of other programs (e.g. financing) that could benefit SMCB energy efficiency projects.

A jointly developed process is in place to prevent double-dipping. To check for double-dipping of BayREN Business project applications, its program implementer will coordinate with PG&E’s Data Team to obtain PG&E’s existing program participation data to verify against applications.

To check for double-dipping of BRRR project applications, program staff will send an updated project list to PG&E to request verification.

To check for double-dipping of PG&E project applications, BayREN will send an updated monthly completed project list to PG&E to verify against applications. This bi-lateral, frequent exchange of information prevents double-dipping across both BayREN and PG&E commercial programs.

c. Coordination Between Programs

Some small businesses, especially those classified as the “smallest of small” businesses, may not be well-suited for a pay-for-performance program such as BayREN Business. These businesses might lack sufficient energy-saving opportunities, making it challenging to justify deferred performance payments for contractors. They may also lack sufficient data needed to establish a 12-month baseline needed to compare energy use before and after intervention. Additionally, their energy consumption data may exhibit statistical volatility, preventing them from meeting the goodness-of-fit criteria. As a result, these businesses are better aligned with direct-install programs like PG&E's Simplified Savings program, see section below for additional distinction and coordination.

PG&E and BayREN will continue to work together to improve data sharing process and resolve any challenges. Both parties have collaborated to develop a consistent data policy to support not only the

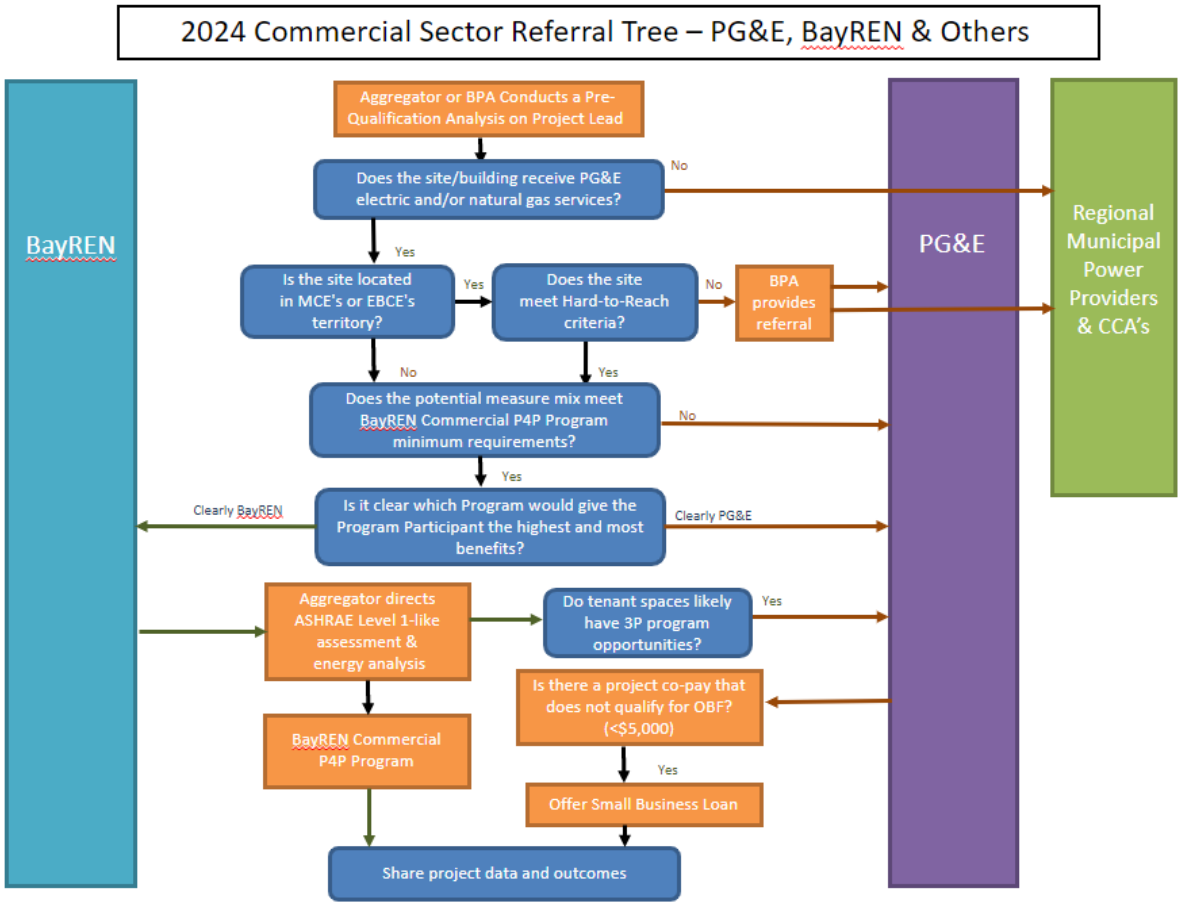
BayREN Business, but also PG&E's portfolio of future NMEC programs. Together, the parties lay the foundations of data processes that will ultimately benefit other utilities, RENs, third-party program implementers, and the ratepayers.

Since both BayREN Business and PG&E's Simplified Savings Program serve small businesses, the parties agree to the following to prevent customer confusion:

- meet monthly to provide updates on marketing and outreach activities and targeted counties;
- maintain distinguishable, unique brandings and websites and
- tailor marketing and outreach to specific segments; e.g. PG&E's Simplified Savings target the "smallest of small" businesses in select counties and BayREN Business target those with more energy savings opportunities.

The Statewide Programs include the Food Service Point of Sale, Commercial Water Heating, Lighting, Wastewater and Commercial HVAC subprograms. BayREN's and PG&E's Program Managers will conduct regularly scheduled check-in calls as described. However, PG&E is not the lead IOU for these programs, and specific data needs or participant details will need to be provided by the lead IOU.

Figure 3: Coordination Protocol for Commercial Programs



d.12-11-015 Compliance

Table 10 describes in further detail how BayREN's Small and Medium Commercial Buildings Programs satisfy the REN criteria in D.12-11-015.

Table 10: BayREN Small and Medium Commercial Buildings Programs' Compliance with D.12-11-015

REN Criteria	BayREN Compliance
1. Activities IOU cannot or does not intend to undertake	• BayREN Business is the sole program dedicated exclusively to improving energy efficiency in HTR businesses using a pay-for-performance approach. • BayREN Refrigerant Replacement program is the sole program that actively identifies and fixes refrigerant leaks, reclaims and recycles environmentally harmful refrigerants, and improves energy efficiency in small food service establishments.
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	BayREN provides more technical assistance, is specifically targeted to HTR and food-service businesses with low annual energy consumption. The subprograms have the potential for scalability by heavily leveraging local and regional resources (e.g. downstream and midstream programs, OBF, microloan).
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	The BayREN Business and BRRR programs are designed to harvest sizable amounts of energy savings cost-effectively in the SMB HTR and food-service sectors. Participants are qualified under D.23-06-055 which expanded HTR eligibility criteria.

6. CODES AND STANDARDS (BAYREN03)

a. Summary of Program Differentiation

BayREN and PG&E Codes and Standards programs address similar audiences — local government building departments and others involved with the building code — but from different approaches, ensuring comprehensive program offering and services. As the statewide lead for Codes and Standards, PG&E develops resources, templates, and technical studies that are comprehensive, effective and useful across the state. PG&E also conducts state building energy code advocacy at the state-level. BayREN bridges the gap between local governments and the state, working from the bottom up to coordinate directly with Building Departments in the Bay Area and to customize training, templates and approaches to codes and standards. PG&E and BayREN will continue to work together to ensure a well-coordinated set of offerings.

Table 11: Summary of Similar BayREN and PG&E Codes and Standards Programs

	BayREN	PG&E
Program Name	Codes and Standards	• Compliance Improvement (PGE21053) • Reach Codes (PGE21054) • State Building Codes Advocacy (PGE_SW_CSA_Bldg)
Eligible Measures	N/A	• N/A
Estimated Budget 2024	$1,873,713	• Compliance Improvement: $5,450,000.00 • Reach Codes: $1,650,848.40 • State Building Codes Advocacy: $3,693,391.47 (PG&E portion of the statewide program)
Estimated 2025 budget	$1,813,492	• Compliance Improvement: $5,956,798 • Reach Codes: $2,337,405 • State Building Codes Advocacy: $4,350,531 (PG&E portion of the statewide program)
Target Audience	Bay Area local government staff and officials including building department staff, planners, sustainability coordinators, and elected officials, and others involved in code compliance such as applicants and contractors.	• The compliance improvement supply chain, including manufacturers, distributors, retailers, architects, builders, designers, energy consultants, contractors, plans examiners, building inspectors, building officials, planners, etc. • National, statewide, and local entities engaged in building codes, appliance standards, or reach codes.
Resource/Non-Resource	Non-Resource	Resource and Non-Resource[20]

b. Summary of BayREN Program Objectives

BayREN's Codes and Standards Program is focused on supporting Bay Area local governments relative to codes and policies concerning energy efficiency, with three general program areas: energy code

[20] The State Building Codes Advocacy program is a resource program, while the Compliance Improvement and Reach Codes subprograms are non-resource programs.

compliance tools and services; specialized and focused trainings and workshops; and stakeholder engagement and policy development.

In terms of compliance tools and services, BayREN works with Bay Area local governments to provide tools and approaches to assist them with code compliance, focusing on the most common project types, as well as those where local governments can have the most influence, such as municipal buildings. BayREN often customizes its tools and services for specific jurisdictions.

BayREN provides specialized and focused trainings and workshops to complement those offered by PG&E. BayREN also hosts regional forums for local government staff, building professionals, energy consultants and policy makers on important energy issues that allow for the sharing of perspectives and best practices.

Finally, BayREN provides regional coordination on energy efficiency policy and assists jurisdictions that are interested in reach codes and/or other energy efficiency policy development, adoption, implementation, and impact tracking. BayREN also facilitates engagement between local governments and the California Energy Commission (CEC) on code development efforts, including ensuring that local government staff are aware of proposed code development proposals and that their concerns about enforceability are considered. BayREN collaborates with other regional agencies on energy efficiency policy and activities, including the Bay Area Air Quality Management District and the Bay Area Regional Collaborative.

c. Comparable and/or Equivalent PG&E Program

PG&E and BayREN both have programs that work towards energy code compliance improvement, code enhancements, and reach codes adoption and implementation.

Compliance Improvement (PGE21053)

PG&E's Compliance Improvement subprogram targets actors within the compliance improvement supply chain to maintain robust statewide compliance with building codes and appliance standards. Compliance Improvement program needs are determined through a performance-based solutions approach to identify training, tools, resources, and outreach necessary to narrow the gap between actual and desired performance. Multiple training modalities are used to maximize student participation. A consistent curriculum is developed and delivered statewide by a team of subject matter experts.

Reach Codes (PGE21054)

The Reach Codes Subprogram provides technical support to local governments that wish to leverage their unique authority to adopt ordinances that require increased efficiency and performance beyond the state's minimum requirements. In addition to differentiating the jurisdiction as an efficiency leader, local energy ordinances accelerate the adoption of new equipment, technologies, code compliance, and energy-savings strategies to help pave the way for future code cycles. The Reach Codes Program responds directly to California's policy goal to significantly reduce greenhouse gas emissions. The program provides support by developing robust toolkits as well as providing specific technical assistance to local jurisdictions considering adopting energy reach codes. These include cost-effectiveness research and analysis, model ordinance language and other code development and implementation tools, specific technical assistance throughout the code adoption process, and technical support to facilitate ordinance implementation which may include training for staff.

State Building Code Advocacy (PGE21051)

The State Building Code Advocacy program targets improvements to California's Building Energy Efficiency Standards (Title 24, Part 6) that are updated by the California Energy Commission on a triennial cycle. The subprogram also supports CALGreen (Title 24, Part 11) updates and ratings organizations as necessary. The program advocates for new or more stringent regulations by a) conducting research and analysis to assess cost effectiveness, technical feasibility, market availability for building code measures, and compliance ability for proposed regulations within the scope of a rulemaking, b) developing code enhancement proposals, and c) participating in public proceedings. PG&E is the lead for this Statewide C&S program.

d. Coordination Protocol Between Programs

To identify opportunities for collaboration and to ensure activities are complementary and non-duplicative, the BayREN and PG&E Codes and Standards teams have regularly scheduled coordination calls to discuss ongoing and planned activities and plan to meet in person annually if public health and safety guidance allows for in person meetings. To ensure there is no overlap of compliance improvement or reach code activities, additional coordination protocols have been developed (see Figure 4 below).

Figure 4: Coordination Protocol for Codes and Standards Programs

BayREN Local, Focused		PG&E Statewide, Comprehensive
• Regional and local demonstration projects, such as eTools • Work with local governments to encourage code compliance • Resources such as permit guides and other resources not offered by PG&E • Focused trainings on common projects, often customized • Quarterly regional Forums to share best practices and new ideas	***Compliance Improvement and Trainings & Workshops***	• Dynamic tools such as Virtual Compliance Assistant, , Reference Ace, Navigator Ace, Image Ace & Product Finder • Outreach campaigns to improve compliance with Title 24, Part 6 & Title 20 • Support for CEA exam • Resources such as trigger sheets, fact sheets, application guides, and other resources not offered by BayREN • Comprehensive T24 Standards Essentials courses, Code & Coffee modeling demonstrations, instructional videos and public workshops
• Facilitates regional reach code and energy efficiency policy efforts • Assists local governments in setting priorities, coordinating with state agencies, and tracking results	***Local Government Ordinances & Policy Supports***	• Develops cost effectiveness studies and other technical resources • Provides technical assistance to local governments upon request • Houses studies, policy development tools, and resources on localenergycodes.com
Engage with local governments to provide local input to state relative to codes, and to share information from state level about code development process back to local governments	***Code Update Advocacy***	• Lead development of code enhancement proposals • Lead advocacy activities; support public workshops and hearings • Support post-adoption work on manuals and software advancements

e. Compliance Improvement

Each PA's website is kept current with training opportunities and other relevant activities. For new compliance improvement tools, resources or training, BayREN and PG&E will discuss the ideas during the regular coordination calls to identify any potential overlap and determine if there are opportunities for collaboration. The PAs will provide, within two weeks from the date of the communication, drafts of compliance improvement resources to each other for comment and consideration. Each program administrator will assist in marketing and outreach efforts of the others' activities by providing information about such activities as appropriate at events, on webpages, or through email channels.

f. Reach Codes

BayREN and PG&E will continue to work together to increase and improve reach code adoption and implementation within the Bay Area and will discuss approaches and progress during regular coordination meetings. PG&E will continue to maintain a local energy codes website which houses completed cost effectiveness studies, reach codes adoption tracking map and list, model language, a policy development tool and impact estimator, and other resources that any local government may download and use to support a local ordinance. BayREN's website provides educational materials and information related to reach codes and energy policies, policy tools and calculators, and links to relevant resources for local government staff. PG&E and BayREN will incorporate links to each other's websites as appropriate.

PG&E, in coordination with other IOUs, will continue to lead reach code cost-effectiveness studies for Bay Area jurisdictions, individually and on a regional level. BayREN will continue to lead outreach among local governments and will refer local governments to PG&E for technical support. PG&E will contact the requesting local government within one week to establish a mutually acceptable schedule and will inform BayREN of the schedule if PG&E intends to carry out a study. If PG&E does not conduct the study, BayREN will respond to the request. During regularly scheduled coordination calls, BayREN and PG&E will provide updates on studies that are planned and in progress.

g. Coordination between SW program(s)

PG&E will coordinate with the statewide codes and standards program as appropriate and will work with BayREN to implement opportunities to reduce ratepayer resource use by working together to address a need. This may take the form of a division of labor, or collaboration, as in the case of a co-sponsored forum or other event.

h. 12-11-015 Compliance

The following table describes in further detail how BayREN's Codes and Standards program satisfies the REN criteria in D.12-11-015.

Table 12: BayREN Codes and Standards Program's Compliance with D.12-11-015

REN Criteria	BayREN Compliance
1. Activities IOU cannot or does not intend to undertake	• BayREN's Codes and Standards activities are designed by local governments. • BayREN's compliance tools and services, and trainings and workshops all fill gaps and support PG&E's compliance improvement activities. While PG&E prepares comprehensive tools, BayREN focuses on key areas of interest to local governments. • BayREN's reach codes activities focus on regional outreach include outreach and coordination. PG&E's activities focus on cost effectiveness and other technical support. • BayRENs stakeholder engagement and policy development activities are undertaken with a regional perspective and directed by the Bay Area local governments such that they do not overlap with PG&E's activities.
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	• BayREN carries out pilot activities within the Bay Area which could potentially be duplicated in other regions (as has been done with 3C-REN) or scaled to the state level. • BayREN's compliance tools and services, and trainings and workshops all fill gaps and support PG&E's compliance improvement activities. While PG&E prepares comprehensive tools, BayREN focuses on key areas of interest to local governments. • Additionally, BayREN conducts various demonstration projects, such as with its eTools, that do not duplicate existing PG&E tools or resources, or those in development. These tools are being used in a limited number of local jurisdictions, in order to test them and determine whether they can be scaled for use throughout the region or in other parts of California.
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	Not applicable

7. PUBLIC SECTOR

a. BayREN Program Summary

Since 2020, PG&E has had contracts with Local Government Partners (LGPs) within BayREN service area that support the following three counties with the full LGP offerings: Marin, Sonoma, and San Mateo. In addition, PG&E's LGPs support energy efficiency project leads for PG&E's Government and K-12 Comprehensive resource program in the following counties: Alameda, Solano, Contra Costa, and Santa Clara.

In 2024, BayREN will start two new programs to serve the public sector in its nine-county[21] service area: the Integrated Energy Services (IES) Program and the Targeted Decarbonization Services (TDS) program. BayREN's public sector programs are intended to help local governments and special districts reach their energy goals, focusing on reducing energy use and global warming emissions for their own facilities and Community Resilience Centers.

Integrated Energy Services (IES) program (BayREN11)

Implementer: To Be Determined

The Integrated Energy Services (IES) program addresses local governments' needs to find integrated solutions to achieve their energy goals by coordinating existing and emerging programs addressing energy efficiency and Integrated Demand-Side Management (IDSM) measures including demand response and distributed energy resources. The IES program includes an Energy Concierge service which will include collecting information on all energy-related rebate, incentive, financing, and technical assistance offerings available to local governments and special districts in the Bay Area, and then helping local government and special district staff to find and apply for the best offerings for the projects they want to do. The IES program also includes an Energy Roadmapping service that will provide utility bill analysis, site visit, and engineering assessment for public buildings or portfolios of buildings to develop a high-level set of recommended energy efficiency, electrification, DR, and DER actions as needed to meet local energy goals. Roadmaps will include recommendations for phasing and financing and will describe the specific actions needed for implementation.

The IES Program will provide two services (Energy Concierge and Energy Roadmapping) that could potentially overlap with the PG&E LGP services in three of BayREN's nine counties. BayREN's IES Program will not duplicate PG&E's Local Government Partnership (LGP) programs in these three counties because BayREN will not conduct outreach for the program within those counties and local governments will not be able to access IES services except through the LGPs using the referral system described below in the Coordination Protocol section. These provisions will eliminate the potential for duplication of services and provide opportunities for BayREN's IES Program and PG&E's LGP services to leverage each other's strengths to better serve local governments.

Targeted Decarbonization Services (TDS) program (BayREN12)

Implementer: To Be Determined

The Targeted Decarbonization Services (TDS) program aims to build the market for decarbonization equipment and technologies, and to demonstrate the feasibility of decarbonization in municipal buildings

[21] BayREN operates in the San Francisco Bay Area, which includes the following nine counties: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma.

through improved information, education, and financing for local governments. The TDS program includes a Decarbonization Showcase that will enroll buildings to pilot and demonstrate approaches to building decarbonization and will collect and share real-world data. The Showcase is not discussed further in this document because PG&E does not have a comparable or equivalent program. BayREN's TDS program also includes a Decarbonization Education and Financing service which will engage with local government and special district staff to educate them about decarbonization equipment and strategies for financing it. This service will also analyze all available funding and financing mechanisms in order to design and test effective incentive structures to promote widespread adoption of decarbonization equipment.

The Education and Finance portion of the TDS program also has the potential to overlap with PG&E's third party GK-12 resource program[22], since that program offers incentives, and the Education and Finance offering will involve identifying incentive/rebate gaps and testing various incentives to address those gaps. BayREN will coordinate with PG&E and the GK-12 program to ensure there is no duplication.

[22] PG&E administers this program as part of its Commercial portfolio and the program is described above in the Commercial section.

Table 13: Summary of Similar BayREN and PG&E Public Sector Programs

	BayREN	PG&E
Program Name	• Integrated Energy Services (IES) • Targeted Decarbonization Services (TDS)	• PGE_Pub_001: CC-LEAP • PGE_Pub_002: Marin*** • PGE_Pub_003: Redwood • PGE_Pub_004: SJVCEO • PGE_Pub_005: San Mateo*** • PGE_Pub_007: Sierra • PGE_Pub_008: Sonoma*** ***Potential for PG&E/BAYREN overlap
Eligible Measures	N/A	N/A
Estimated Budget 2024	• IES: $873,568 • TDS: $786,802	• $3,470,000** • ** total program budget for all 7 LGP contracts
Estimated 2025 budget	• IES: $866,493 • TDS: $1,149,436	• $4,100,400** • ** total program budget for all 7 LGP contracts
Target Audience	Local governments and special districts located in the nine-county Bay Area	• City governments & townships, Tribes, County governments, K-12 school districts, Water/wastewater agencies/districts, Other public agencies (not served by Statewide Programs) & special districts • Small to Medium Hard-to-Reach Businesses
Resource/Non-Resource	Non-Resource	Non-Resource

b. PG&E Program Summary and BayREN Distinction

Local Government Partnerships (LGP) (PGE_Pub)

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.

PG&E's Residential & Partnership Programs Team administers 7 LGPs who support K-12 public schools and offer 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 Marin, Sonoma, and San Mateo 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
- Performing level of enhanced engagement with public sector
- Development of Energy Action Plans
- Assistance in the development of local EE Reach Code ordinances
- Completing Municipal/K-12/Community-wide GHG inventories.

c. Coordination Protocol Between Programs

BayREN and PG&E both strive to provide the most robust set of resources to our local governments, and both agree that it is important to avoid confusion about who local government resource contacts. To accomplish this, BayREN and PG&E have developed the following referral system for the three counties that are both part of BayREN and have an operating PG&E LGP:

- If any local governments in a county with an LGP contact BayREN's Energy Concierge or Energy Roadmapping service directly, they will be referred to the PG&E LGP.
- PG&E's LGPs will be able to access BayREN's Energy Concierge and Energy Roadmapping resources and services on behalf of the local governments within their counties, when they want to access services such as long-term planning, engineering assistance, and inclusion of DERs.

A version of this referral system is already in place in San Mateo County, where LGP staff work with local governments and refer them to the GK-12 program, BayREN's current Municipal ZNE/ZNC Technical Assistance program (which will be replaced by the Energy Roadmapping service), or their local CCA as appropriate. In some cases, jurisdictions have used BayREN's program for long-term planning and then accessed the GK-12 program and/or a CCA program for more immediate assistance with implementation.

In addition, BayREN will coordinate with the LGPs when developing the database for the Energy Concierge to ensure that all offerings, including PG&E offerings, that LGP staff know about are included. The database will also include statewide programs and new programs as they are implemented.

BayREN will also coordinate with the PG&E GK-12 program when developing and testing incentive structures in order to ensure there is no duplication.

For ongoing coordination relative to these public sector programs, we intend to meet on an as-needed basis as the BayREN programs are starting up, and then to develop a regular meeting schedule.

d. Coordination between SW Program(s)

The Statewide Programs supporting the Public sector include Higher Education Efficiency Performance (HEEP) Program and Water Infrastructure and System Efficiency (WISE) Statewide Initiative. BayREN's and PG&E's Program Managers will conduct regularly scheduled check-in calls as described above. However, PG&E is not the lead IOU for these programs, and specific data needs or participant details will need to be provided by the lead IOU. Since BayREN's public sector programs do not serve higher education facilities and are not designed to address water infrastructure, BayREN and PG&E do not anticipate a need for regular coordination with the HEEP or WISE Programs.

e. D.12-11-015 Compliance

The following table describes in further detail how BayREN's PUBLIC program satisfies the REN criteria in D.12-11-015.

Table 14: BayREN Public Program's Compliance with D.12-11-015

REN Criteria	BayREN Compliance
1. Activities IOU cannot or does not intend to undertake	a. The Integrated Energy Services program provides Energy Concierge and Energy Roadmapping technical assistance to local governments in six counties where PG&E has no equivalent or overlapping program. i. Three counties are served by a PG&E-funded Local Government Partnership, which provides deep and customized services that overlaps with the IES program. BayREN will not conduct outreach to or provide assistance at the request of a local government in those counties. If for some reason an LGP is unable to assist a local government with a particular request, however, that LGP would have the option of referring the local government to BayREN's IES program. b. The Decarbonization Showcase will enroll buildings to pilot and demonstrate approaches to building decarbonization and will collect and share real-world data that could potentially be utilized by PG&E's LGPs and GK-12 program. PG&E has no equivalent or overlapping program. c. The Education and Financing Service will focus on educating local government and special district staff about operations and financing of decarbonization equipment and will specifically explore gaps in available

	rebates in order to test incentives. PG&E has no equivalent program, and BayREN will coordinate with the GK-12 program to prevent duplication.
2. Pilot activities where there is no IOU program offering and where there is potential for scalability	BayREN pilots activities within the Bay Area which could potentially be duplicated in other regions or scaled to the state level. All of BayREN's public program services (Energy Concierge, Energy Roadmapping, Decarbonization Showcase, or Decarbonization Education and Financing) could potentially be duplicated in regions with no equivalent IOU offering or scaled across multiple regions.
3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap	Not applicable

8. DATA SHARING PROTOCOL

PG&E has data governance and protection obligations for sharing any customer data. Before sharing data double-dip check purposes or to support a BayREN program, the following data security and privacy protocols need to be completed:

- The party seeking customer data is in contract with BayREN or with the lead contractor for a BayREN program.
- The party seeking data has signed the PG&E-BayREN Non-disclosure Agreement (NDA).
- The party seeking data has completed PG&E's Third-Party Security Review (TSR) and TSR renewals where applicable.

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

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

BayREN will provide PG&E with a quarterly savings, financial, and Total System Benefit[23] (TSB) forecast update. The quarterly savings forecast update is the estimated energy savings resulting from BayREN energy efficiency programs. The financial forecast update is the financial payments BayREN anticipates from PG&E for its energy efficiency programs. BayREN will ensure that any changes in the BayREN program delivery are reflected in these forecast updates.

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

APPENDIX A: SUMMARY OF BAYREN PROGRAM COMPLIANCE WITH D.12-11-015

Check D.12-11-015 Threshold Criteria that apply for each program	Comparable PG&E Program if applicable	Comparable Statewide IOU Program	1. Activities that utilities cannot or do not intend to undertake.	2. Pilot activities where there is no current offering, and where there is potential for scalability to a broader geographic reach, if successful.	3. Pilot activities in hard-to-reach markets, whether or not there is a current utility program that may overlap.
BayREN BAMBE (Multi-Family) (BayREN02)	Multi-Family Energy Savings Program) (PGE_Res_003)		**XX**	**XX**	
BayREN Commercial (BayREN06)	• Commercial Calculated (PGE21011) • Commercial Deemed (PGE21012) • Government & K-12 (PGE_Pub_009) • SmartLabs (PGE_Com_002) • CoolSave Grocery (PGE_Com_001) • RAPIDS Wastewater (PGE_Pub_010) • NetOne Comm Comprehensive (PGE_Com_003) • SmartLabs Comm (PGE_Com_004) • Advance Energy Program HT/BT (PGE_Com_005) • Simplified Savings (PGE_COM_SMBZ)			**XX**	**XX**
BayREN Commercial (BayREN10)	• CoolSave Grocery (PGE_Com_001)			**XX**	**XX**
BayREN Codes and Standards (BayREN03)	• Compliance Improvement (PGE21053) • Reach Codes (PGE21054)	State Building Codes Advocacy (PGE_SW_CSA_Bldg)	**XX**	**XX**	

APPENDIX B: BAYREN'S PORTFOLIO SUMMARY OF PROGRAMS OFFERED FOR 2024-2025

REN Program Unique ID	Sector	2024 Annual Budget	2025 Annual Budget	Eligible Measures
BayREN Single-Family (BayREN08)	Residential	$8,500,593	$8,507,221	Duct sealing, attic and wall insulation, HVAC equipment upgrades, Smart thermostats, gas storage water heaters and heat pump water heaters, heat pump clothes dryers, induction cooktop/ranges. Single measure upgrades allowed.
BayREN Green Labeling (BayREN07)	Residential	$1,648,952	$1,717,299	N/A
BayREN Multi-Family (BayREN02)	Residential	$8,450,550	$8,488,626	Envelope, HVAC, DHW, lighting, and appliance measures – requires multiple measures, targeting 15-20% savings.
BayREN Commercial (BayREN06)	Commercial	$4,576,889	$4,725,499	Advanced Metering Systems; Boiler Plant Improvements; EMCS; Building Envelope Modifications; Chilled Water, Hot Water, and Steam Distribution Systems; Chiller Plant Improvements; Electrical Peak Shaving/Load Shifting; Electric Motors and Drives; Energy/Utility Distribution Systems; Energy Related Process Improvements; Lighting Improvements; HVAC maintenance and replacement; Appliance and Plug-Load Reductions
BayREN Commercial (BayREN10)	Commercial	$3,468,064	$4,617,614	Refrigeration & Food Service Equipment; Synthetic and Natural Refrigerants; Maintenance Training and Tools
BayREN Public (BayREN11)	Public	$873,568	$866,493	N/A
BayREN Public (BayREN12)	Public	$786,802	$1,149,436	N/A

REN Program Unique ID	Sector	2024 Annual Budget	2025 Annual Budget	Eligible Measures
BayREN Climate Careers (BayREN09)	Cross Cutting	$2,797,251	$2,978,516	LED lamps, water faucet aerators, low flow showerheads and Tier II power strips.
BayREN Codes and Standards (BayREN03)	Cross Cutting	$1,873,713	$1,813,492	N/A
BayREN Water Energy Nexus (BayREN04)	Cross Cutting	$1,806,969	$1,923,207	Water efficiency upgrades that also deliver energy savings (site and embedded) through the water-energy nexus. Measures are "eligible" to be included as part of a program participant's on-bill charge. Measures are not limited to energy efficiency eligible measures (EEEMs). Measures are not eligible for BayREN Energy Efficiency Portfolio rebates. IOU rate-payer funds are not used to underwrite or directly finance measure installation. Eligible measures will include, but may not be limited to: A 1.06 gallon per flush or better toilet with a Maximum Performance (MAP) rating of 600 grams or more. A high efficiency (typically 1.5 gallon per minute) showerhead. A 1.0 gallon per minute bathroom faucet aerator. A 1.5 gallon per minute kitchen faucet aerator. Turf removal and irrigation system improvements to prepare sites for drought tolerant landscaping.

APPENDIX C: PG&E'S PORTFOLIO SUMMARY OF PROGRAMS OFFERED FOR 2024-2025

For information on PG&E's portfolio of programs, please see *Pacific Gas and Electric Company's 2022 Energy Efficiency Annual Report* [24] More information on PG&E's EE programs, including budgets and Implementation Plans, can also be found on the California Energy Data and Reporting System (CEDARS) [25]

[24] PG&E's 2024-2027 True-Up Advice Letter Advice 4814-G/7047-E can be found on PG&E's website at: GAS_4814-G.pdf (pge.com); PG&E's Energy Efficiency Annual Report for 2022, filed on 6/5/2023 can be found on CPUC's website at: Microsoft Word - R.13-11-05_PGE Energy Efficiency Annual Report (PUBLIC) 06-01-23 FINAL.docx (ca.gov)

[25] For additional information: PA-specific Programs - CEDARS (sound-data.com)