

2026-2027
Joint Cooperation Memo

BAY AREA REGIONAL ENERGY NETWORK (BayREN)
PACIFIC GAS AND ELECTRIC COMPANY (PG&E)

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OVERVIEW

The 2026-2027 Joint Cooperation Memo (JCM) between the Bay Area Regional Energy Network (BayREN) and Pacific Gas and Electric Company (PG&E) covers energy efficiency (EE) program activity and collaboration in program years 2026-2027, and includes the following information:

1. An overview of programs the two EE program administrators (PAs) intend to offer in overlapping areas¹. Each program summary includes the current implementer (if known) for the program at the time this document was completed.² 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.19-12-021.³

BayREN and PG&E policy and program staff will meet regularly to ensure that cooperation, coordination, and the best service to joint territory customers is realized. Meetings will occur virtually or in-person. Meetings may include discussions on customer choice, marketing, policy, and double dipping⁴ prevention. BayREN and PG&E have jointly determined a meetings schedule for 2026-2027. BayREN and PG&E will share the responsibility of scheduling and managing the program coordination meetings. Meetings occur for each set of programs: Residential, Commercial, Public, WE&T, 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 regular meetings, and to providing updates on new programs which may open to customers.

¹ All of BayREN territory overlaps PG&E territory. BayREN consists of nine California Bay Area counties, all of which are within PG&E territory, <https://www.bayren.org/about> and <https://californiaregionalenergynetworks.org/about>

² This memo includes budget forecasts for 2026-2027 that are outlined in PG&E's 2026-2027 Mid-Cycle Advice Letter (Advice 5141-G/7752-E) and BayREN's 2026-2027 Mid-Cycle Advice Letter (AL#34-E), unless otherwise specified.

³ D.12-11-015, p. 17.

⁴ "Double Dipping", defined in *Resource Savings rulebook, v 4.0, 10/2/2023*, page 37, Section 2.2.2. Projects receiving incentives or claiming savings through any energy efficiency program must not also receive incentives (i.e., double-dip) or claim savings (i.e., double-count) for the same interventions through any other program.

<https://www.pge.com/assets/pge/docs/about/doing-business-with-pge/PGE-Resource-Savings-Rulebook.pdf#:~:text=Double%20Dipping%20and%20Double%20Counting&text=CPUC%20Requirement:%20Participants%20in%20meter%2Dbased%20programs%20are%20subject%20to%20the%20same%20double.>

This JCM is structured as follows:

1. **BayREN Program Summary:** A description of each program BayREN will administer in 2026-2027, by sector.
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. **D.12-11-015 Compliance:** Identifies how the BayREN program satisfies the criteria for REN activities established in D.12-11-015.
5. **Coordination Between Statewide (SW) Program(s)**
6. **Data Sharing Protocol**
7. **Appendices:**
 - a. *Appendix A:* Summary of REN compliance with D.12-11-015 and D.19-12-021 for all planned programs.
 - b. *Appendix B:* List all programs BayREN currently anticipates offering in 2026-2027, including information on draft budgets and measure eligibility.
 - c. *Appendix C:* List all similar programs PG&E currently anticipates offering in 2026-2027, including information on draft budgets and measure eligibility.

RESIDENTIAL SECTOR

BayREN Program Summary - Single Family

BayREN Efficiency and Sustainable Energy (EASE) Home (BayREN08)

Implementer: Franklin Energy

BayREN's single-family program, the Efficiency and Sustainable Energy (EASE) Home program, offers income-qualified single-family residential customers the direct installation of weatherization, energy efficiency, and necessary health and safety upgrades. The program covers at least 80% of costs with technical assistance included; customer co-payment has a not-to-exceed limit of \$1,000. The program's income qualifications are households at or below 120% Area Median Income, targeted at moderate-income households in the Bay Area. Tenants can participate with property owner permission.

The CPUC D. 21-05-031 directed the energy efficiency PAs to segment their portfolios into programs designed for three purposes: resource acquisition (RA), market support (MS), and equity. In BayREN's 2024-2031 Business Plan, BayREN selected the single-family program within the equity segment. BayREN's EASE Home Program targets hard-to-reach (HTR) 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.⁵ BayREN defines moderate income as households who do not qualify for income qualified weatherization programs⁶ up to 120% AMI per household by county designation.⁷ 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.⁸ Lastly, BayREN's single-family program includes households within a pollution burdened area as defined by CalEnviroScreen 4.0.

Participants receive one-on-one assistance from a qualified Energy Advisor, receiving a complimentary home assessment and customized scope, technical assistance, and guidance on acquiring rebates through other programs. Measures are directly installed by partner contractors. The program will also provide post-installation support and resources. All equipment is backed by a one-year warranty.

Like all BayREN programs, outreach in 2026-27 will continue to be done primarily by local governments. Utilizing marketing and outreach channels from local county government offices enables high trust and hands-on support for residents, especially for those with low digital literacy or in-language needs. Campaigns focus on targeted outreach to high-priority communities (e.g. moderate-income, health-burdened, and non-English speaking populations) through partnerships with local community-based organizations and ethnic media platforms.

⁵ **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.

⁶ For example, moderate income households that are above the eligibility requirements for the Energy Savings Assistance (ESA) Program.

⁷ 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>

⁸ 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.

EASE Home works in coordination with BayREN’s WE&T program, Climate Careers. Single family residents that participate in Green House Calls provided by Climate Careers are directed to the broader BayREN offerings, including EASE Home.

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

	BayREN	Current Single-Family PG&E Programs operating in BayREN Territory			
Program Name	BayREN EASE Home (BayREN08)	Virtual Energy Audit Program (Home Intel) (PGE_Res_001b)	Home Energy Checkup (HEC) (PGE_Res_002a)	Empower My Home (PGE_Res_005)	Energy Savings Assistance Program (ESA)
Eligible Measures	Attic and wall insulation; duct sealing, repair, replacement; smart thermostats; weatherstripping; bathroom and kitchen ventilation replacements; necessary remediation measures. Must be direct install.	Online energy audit, detailed energy reports	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.	The EmPower My Home pilot is PG&E’s residential electrification initiative designed to help residences in low and moderate-income communities transition from natural gas to energy-efficient electric appliances at reduced or no cost. The pilot supports whole-home or partial electrification solutions for eligible dual-fuel PG&E customers in select Northern and Central California locations.	Duct sealing, attic insulation, weatherstripping, furnace and water heater repair/replacement, heat pump water heaters, variable speed pool pumps, refrigerators, clothes washers, air purifiers, smart thermostats, advanced power strips and more.
Incentive	80% of project scope covered. \$1,000 max customer co-pay.	Free energy analysis and personal energy coach	N/A.	N/A	N/A
Savings Claim Type	Savings will be deemed per measure based on CPUC approved work papers.	Savings Claims use Normalized Metered Energy Consumption (NMEC) methodology	Measure Package outlines the methodology for computing savings for this program.	Measure Package outlines the methodology for computing savings for this program.	Energy Savings are offered on a per-measure basis.
2026 Budget	\$10,526,465	\$3,528,936	\$2,343,916	\$3,737,334	\$100,305,712
2027 Budget	\$10,582,603	\$3,546,155	\$2,347,289	\$3,075,307	Pending Bridge Funding Application Decision

-Target Customer	Households up to 120% AMI (owners and/or renters), 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	Specialty contractors
Resource/ Non-Resource	Resource	Resource	Resource	Resource	Resource

PG&E Program Summary and BayREN Program Distinction

PG&E Energy Savings Assistance (ESA)

Implementers: Resource Innovations and Richard Heath and Associates

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

BayREN’s EASE Home requires income qualification for applicants stating they meet the moderate-income level requirement and exceed ESA-eligibility qualifications. Households with previous PG&E ESA participation are flagged during the application process and deemed ineligible.

In addition to the ESA Program, PG&E’s current single-family residential EE offerings are:

- a. Virtual Energy Audit Program - HomeIntel Program
- b. Home Energy Checkup
- c. WaterSaver Phase 2

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

Implementer: Home Energy Analytics

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

PG&E Home Energy Checkup (PGE_Res_002a)

Implementer: Oracle

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

PG&E EmPower My Home (PGE_Res_005)

Implementer: Resource Innovations

The EmPower My Home pilot is PG&E's residential electrification initiative designed to help residences in low and moderate-income communities transition from natural gas to energy-efficient electric appliances at reduced or no cost. The pilot supports whole-home or partial electrification solutions for eligible dual-fuel PG&E customers in select Northern and Central California locations. **The pilot's primary goal is to obtain data and learnings to inform future efforts to scale electrification more broadly.**

PG&E WatterSaver Phase 2 (PGE_Res_007)

Implementer: Association for Energy Affordability

WatterSaver is a daily load shifting program primarily for single family and multifamily (MF) customers with heat pump water heaters and electric resistance water heaters. The program's primary objective is to demonstrate load flexibility of electric water heaters to shift load outside of peak period to reduce demand on the grid and provide bill savings. The original pilot intended to scale and standardize load shifting by removing barriers to enrollment and participation, as well as testing the flexibility of connected water heaters in response to various load shifting signals. This continuation of the pilot, will maintain the goals of the original pilot.

Participants who enroll in WatterSaver can optimize their energy use and save money by allowing the program to control their water heaters to shift energy use outside of peak period. 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.

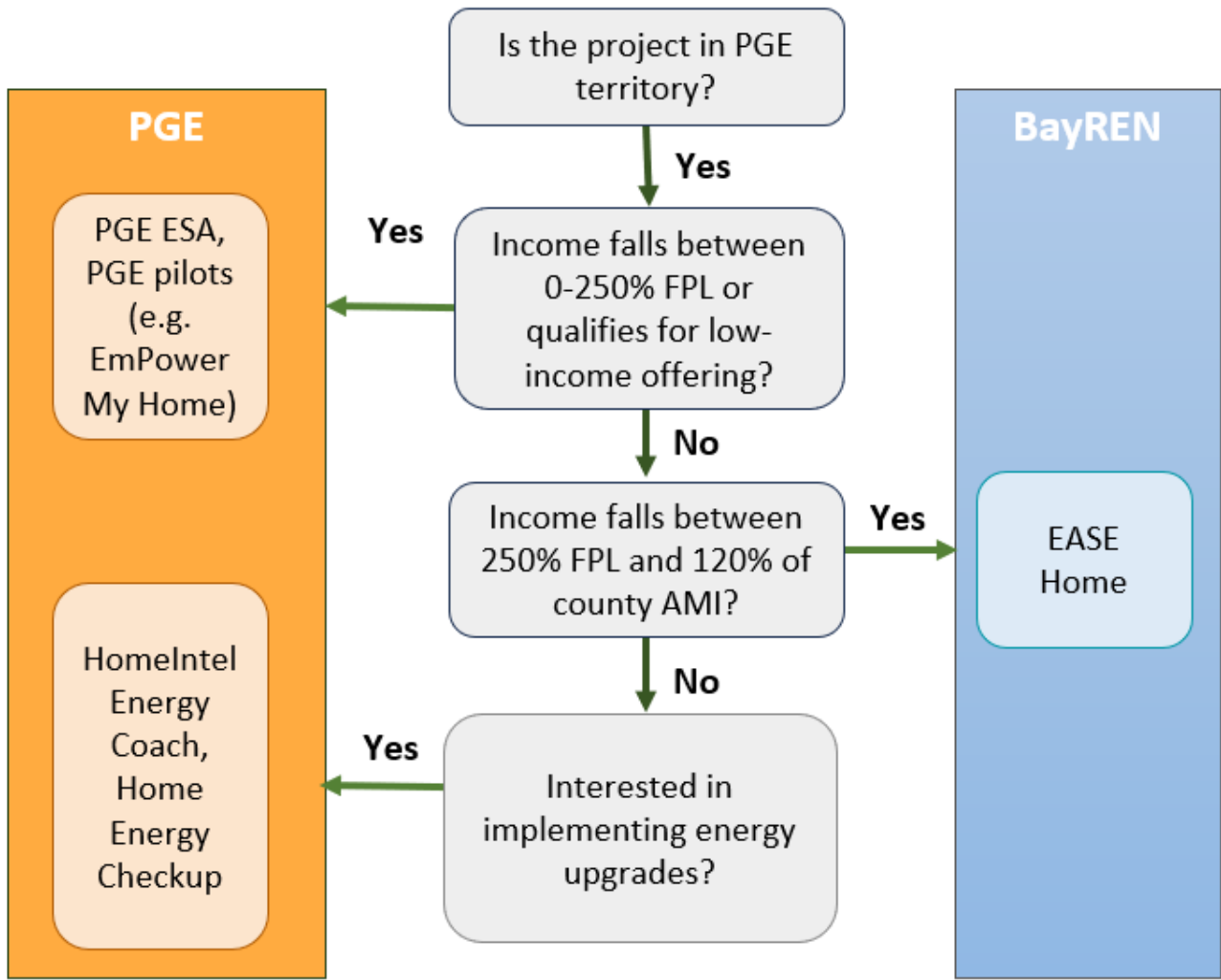
Coordination Protocol between Programs

BayREN EASE Home 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 EASE 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.

Figure 1: Coordination Protocol between Single-Family Programs



12-11-015 Compliance

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

Table 2: BayREN Single Family Program Compliance with D.12-11-015

REN Criteria	BayREN Compliance
<p>1. Activities IOU cannot or does not intend to undertake</p>	<p>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 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.</p>
<p>2. Pilot activities where there is no IOU program offering and where there is potential for scalability</p>	<p>Not applicable</p>
<p>3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap</p>	<p>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).</p>

BayREN Program Summary - Other

Green Labeling (BayREN 07)

Implementer: Franklin Energy

BayREN's Green Labeling program provides energy efficiency trainings for real estate professionals. These trainings target real estate agents, appraisers, and lenders to help them understand the technical details of energy efficiency and electrification, how to discuss these upgrades, as well as potential rebates or financing options, with clients, and refer them to contractors. With a more knowledgeable real estate sector, residents may consider energy efficiency upgrades alongside other cosmetic home improvements, recoup the value of upgrades when a home sells, and differentiate energy efficient homes in the real estate market. Note that the Green Labeling program also included Home Energy Score activities from 2018-2025, which are now housed under the statewide Home Energy Score California program. 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 Green Labeling and PG&E Workforce Activities

	BayREN	PG&E
Program Name	Green Labeling	Workforce, Education, and Training (WE&T)
Eligible Measures	N/A	N/A
Estimated 2026 Budget	\$1,030,979	\$40,000
Estimated 2027 budget	\$1,030,654	\$40,000
Target Audience in 2026-2027	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.	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

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:

- 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.

PG&E Program Summary and BayREN Program Distinction

PG&E does offer some trainings that are relevant to real estate professionals that are distinct from those offered by BayREN. Below is a sample of the trainings being planned or considered by each entity based on the 2025 program year.

Table 4: BayREN and PG&E Potential Trainings for 2026-2027

BayREN	PG&E
<p>In Person Certification Trainings:</p> <p>National Association of REALTORS (NAR) - Green Designation</p> <p>National Association of Real Estate Brokers (NAREB) Realtor Trainings</p> <p>Accredited Green Appraiser</p>	<p>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.</p>

BayREN	PG&E
<p>In Person Classes & Events:</p> <p>Electrification for Real Estate Professionals</p> <p>Induction Cooking Demo for Realtors</p> <p>Green Home Tours</p> <p>Green Real Estate Marketing</p>	

Coordination Protocol Between Programs

BayREN and PG&E have coordinated on real estate sector engagement since 2013. BayREN and PG&E representatives 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 2026-2027, 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. 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 2026-2027, BayREN and PG&E will continue to coordinate by sharing class lists for each program year. If there are concerns about overlap, program leads will ensure that any such classes are scheduled at different times of the program year, market to different groups, and clarify the titles and class descriptions to clearly delineate the content and audience for trainings.

In 2026 and 2027, BayREN will be piloting several new classes under the Green Labeling program, including ones for real estate professionals focused on the health and resilience benefits of energy efficiency and electrification. Testing will also include new audiences, such as architecture and design professionals, based on the success of BayREN's work with real estate stakeholders. This would continue the goals of supporting the market for energy efficiency by training additional groups that have influence on home upgrades but are not contractors, manufacturers, or installers of equipment. BayREN will coordinate with PG&E in the same way they currently do with real estate classes on these new offerings to ensure no duplication.

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 Compliance with D.12-11-015

REN Criteria	BayREN Compliance
<p>1. Activities IOU cannot or does not intend to undertake</p>	<p>BayREN’s real estate trainings offer different classes and certifications than those offered in the PG&E WE&T program. For example, BayREN’s classes are specifically targeted to real estate professionals whereas PG&E content is catered to a broader audience. BayREN’s trainings are also meant to build long-term relationships between local real estate professionals and local governments.</p>
<p>2. Pilot activities where there is no IOU program offering and where there is potential for scalability</p>	<p>In 2026 and 2027, BayREN will pilot new class content on the health and resilience benefits of energy efficiency and electrification and test new audiences for training, such as architecture and design professionals, who have influence over the upgrades made in a home.</p>
<p>3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap</p>	<p>N/A</p>

BayREN Program Summary - Multifamily

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

Implementer: Association for Energy Affordability and San Francisco Environment Department

The BayREN Multifamily has been supporting energy efficiency upgrades in properties across the Bay Area for over 12 years. The program currently provides comprehensive, customized technical assistance and significant rebates to assist property owners in making energy efficiency upgrades to their buildings, from initial assessment through construction. The program aims to dedicate the majority of its resources to:

- Small (<50 units), below-market rate (UAH/NOAH and deed-restricted) multifamily properties who face greater barriers to making upgrades (e.g. lower operating budgets, older building and systems) and/or participating in energy programs (e.g. independent owners who lack awareness of incentive programs).
- Properties disproportionately burdened by air quality, high heat, and housing costs.
- Properties willing to electrify gas end uses including hot water, space heating, and cooking

In 2025, BAMBE implemented the following into its program design and related program manual to prevent over enrollment and prudently manage its incentive budget:

- Market rate projects ≥ 50 units are not eligible for the program
- Deed restricted projects ≥ 50 units will be capped at \$500/unit
- Co-leveraged* projects <50 units will be capped at \$5,000/unit
- Non co-leveraged projects <50 units not capped

* Co-leveraged projects are those that formally participate in other rebate programs that jointly fund all or part of the BAMBE project scope. These include but are not limited to ratepayer (e.g. PG&E’s Energy Smart Homes, MCE’s MFES Equity) and non-ratepayer funded programs (e.g. TECH, LIWP) administered by various organizations (e.g. CCAs, state agencies/departments/commissions).

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 6: Summary of Similar BayREN and PG&E Multifamily 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	<ul style="list-style-type: none"> • Heat Pump Water Heating • Heat Pump Space Heating & Cooling • Induction Ranges & Cooktops • Recirculation Controls • Low-Flow Fixtures • Attic Insulation • Other Approved Deemed Measures 	HVAC, DHW (heat pump), and appliance measures, with required whole building gas replacement and removal. ⁹	Envelope, HVAC, DHW, lighting, appliances, pool pump and water heater, electrification measures, and other
Estimated 2026 Budget	\$9,801,101	All Electric Statewide: \$ 2,706,356 ¹⁰ PG&E portion of statewide total budget	\$47,222,869
Estimated 2027 budget	\$8,646,846	All Electric Statewide– \$3,149,387 ¹¹ PG&E portion of statewide total budget	Pending Bridge Funding Application Decision
Target Audience	Older, unsubsidized affordable housing (UAH aka NOAH) and deed-restricted affordable housing <50 units	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, where each unit shares at least one wall or floor/ceiling with another unit. Deed-restricted multi-family property where at least 65% of residents meet ESA low-income criteria and non-deed-restricted multi-family property where at least 80% of residents meet ESA low-income criteria. Both property owners and tenants are eligible.

⁹ PG&E expects the list of eligible measures to change in 2026-2027 with the updated Title 24 code requirements. PG&E will keep BayREN updated on program changes as the program evolves.

¹⁰ The 2026-2027 budget listed for the California Energy Smart Homes (Mixed-Fuel, All Electric) programs is the PG&E contribution to the Statewide budget; PG&E, SCE, SCG, and SDG&E contribute funds proportionate to their respective service territories.

¹¹ *ibid*

PG&E 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.

For more information visit caenergysmarthomes.com. The California Energy Design Assistance Programs, included in the Commercial programs section below, also offer support for multifamily buildings over three stories.

Energy Savings Assistance – Northern Multi-Family Whole Building (ESA - Northern MFWB)

Implementer: TRC

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

PG&E On-Bill Financing (OBF) (PGE_OBFAP)

Implementer: PG&E

On-Bill Financing (OBF) is a key enabler of energy savings for customers, providing zero-percent financing for qualifying EE retrofits. Loan payments appear as fixed monthly charges on the customer's PG&E bill. OBF helps customers, who would do not have access to affordable capital, get over the first-cost hurdle to EE investment, unlocking broader and deeper cost savings while supporting PG&E's energy savings targets. 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.

PG&E Single Point of Contact (PG&E ESA Funded Program)

The PG&E Single Point of Contact service helps customers find multifamily program offerings to achieve carbon free affordable energy consumption. PG&E Single Point of Contact (SPOC) is a one-stop model to help property owners and managers reach net-zero goals through no-cost benchmarking, financing resources, and assistance to identify, enroll in, and combine relevant multifamily programs.

[Programs - PG&E Multifamily Single Point of Contact](#)

Coordination Protocol Between Programs

BayREN and PG&E 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, CESHP and ESA Northern MFWB: BayREN and PG&E are committed to continuing regular coordination on program design and delivery. Regularly scheduled calls will occur on a roughly monthly cadence between BAMBE and PG&E program leads to share program developments, improve the customer experience, and coordinate on projects. In the coordination calls, CESHP, ESA Northern MFWB, and BAMBE teams keep each other apprised of outreach/marketing plans and double dip prevention. Teams will actively discuss SPOC referrals, and opportunities to reduce customer confusion through active program coordination.
- Annual in person meeting, rotating yearly between locations determined by BayREN and PG&E.
- Pursuant to the general directive regarding ESA in Resolution E-5400, the BAMBE program will continue to refer eligible multifamily energy efficiency program customers to ESA if there is an overlap in program offerings as described below.
- Customer referral: PG&E SPOC, CESHP, ESA Northern MFWB, and BAMBE lead intake and technical staff will follow the referral process outlined in the paragraph 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.
- 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 the program designated by the process outlined below or SPOC, if unsure. Conversely, CESHP and ESA Northern MFWB will refer customers to the program designated by the process outlined below or SPOC, if unsure.
- BAMBE will refer low-rise multi-family (2-4 units) without shared central DHW or HVAC systems to CESHP if the participant is interested in full electrification.
- PG&E and BAMBE will also explore opportunities for incentive layering between programs to optimize incentive amounts and project scopes for participants.
- 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.

Potential projects (aka leads) initiated by SPOC will be directed to the program that provides the highest estimated incentive level based on initial customer input around project location and potential project scope. This process will be guided by "PGESPOC_TRC_DecisionTree_2026-03-30.pdf" and "PGESPOC_TRC_ProgramsMatrixforBayREN_2026-03-30.xls". If said project is unwilling to perform income verification as required by ESA NMFWB, they will be referred to either BAMBE or CESHP based on project location, projected scope, and incentive amount. For projects that come in through one of our programs (BAMBE, CESHP or ESA NMFWB), that program will work with the customer to assess if their program is the best fit based on project location, potential project scope, and estimated incentive amount associated with program participation. If that program is not the best fit, the project will be referred to SPOC with background information included to aid in guiding the project to the best program for its needs. If incentive amounts change for any of the three programs, updated incentive amounts will be shared via email with the program leads and discussed at the subsequent monthly check-in.

D.12-11-015 Compliance

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

Table 7: BayREN Multifamily Program 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 disproportionately 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. ¹²

NON-RESIDENTIAL SECTOR

BayREN Program Summary - Commercial

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

BayREN Business (BayREN06)

Implementer: Alternative Energy Systems Consulting (AESC) and San Francisco Environment Department

BayREN Business is a resource acquisition program serving SMCB using population-level, normalized metered energy consumption (NMEC) approach. The program began in 2020 and by 2022, it shifted from using a single implementer to an implementer offering a marketplace with multiple aggregators (installation contractors) to deliver whole-building energy efficiency services. In June 2023, BayREN Business refined its service sector by only serving hard-to-reach (HTR) businesses¹³ with energy use of equal to or less than 150,000 kWh or equal to or less than 50,000 therms 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.

In 2026, BayREN Business will expand eligibility criteria to serve more businesses. First, the program will increase the annual electricity consumption threshold from 150,000 kWh or less to 300,000 kWh or less while keeping the annual 50,000 therms limit unchanged. Second, eligible businesses must qualify as HTR *unless* they are in Disadvantaged (DAC),¹⁴ Low-Income Communities (LIC),¹⁵ or both.

¹² D.23-06-055 – Section 7.3 Modifications to “Hard-to-Reach” Definition, page 53 and 54

¹³ D.23-06-055, pg. 52-54, Hard To Reach definition: [512907396.PDF](#)

¹⁴ A DAC is in the top 25th percentile according to CalEnviroScreen 4.0: <https://experience.arcgis.com/experience/11d2f52282a54ceebcac7428e6184203/>

¹⁵ Low-income communities are shown on the California Climate Investments Priority Populations [map](#).

Also, in 2026, BayREN Business intends to increase the number of projects with fuel-substitution measures. Notably, the program will focus on replacing natural gas water heaters under 80 gallons with 120VAC or 240VAC heat pump water heaters in SMCB that have less hot water demand like offices and retail stores.

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

- A focus on HTR businesses outside of DACs and LICs, as well as HTR and non-HTR businesses within DACs and LICs, all with annual energy use of no more than 300,000 kWh and 50,000 therms.
- An incentive structure that includes an advance payment and a 12-month true-up based on metered savings, in compliance with the Commission’s NMEC Rulebook (v2.1).
- Eligible businesses must have at least 12 months of energy consumption data *and* the data must meet the program’s goodness-of-fit criterion.

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 and repairs using a direct-install approach where the participating business pays little out-of-pocket costs. Furthermore, BRRR provides participating businesses with resources to sustain refrigeration maintenance and track their systems’ energy consumption.

BRRR will serve only small- and medium-sized businesses in the food and floral sectors. Eligible businesses must operate at least one and no more than three remote condensing refrigeration systems using high-global warming potential refrigerants (GWP > 1,800). Businesses must be independently owned or part of a chain with no more than ten (10) locations in the Bay Area.

Examples of eligible food service businesses include sit-down and take-out restaurants, small grocery and corner stores, bars, and community kitchens. All participating businesses must qualify as HTR using the same criteria as the BayREN Business program. Businesses that do not qualify as HTR must instead meet the BayREN Business program’s geographic eligibility requirement by being in a DAC, LIC, or both.

In addition to repairing refrigerant leaks and replacing environmentally harmful refrigerants, BRRR will provide technical assistance, contractor referrals, basic do-it-yourself maintenance guidance, and deemed energy efficiency incentives to eligible businesses. BRRR will recruit refrigerant contractors across the Bay Area to deliver program services, including direct installation of energy efficiency measures. To sustain project benefits, BRRR will also offer in-person or online maintenance training, tools, and reminders.

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 2026.

Table 8: Summary of Similar BayREN and PG&E Small and Medium Commercial Buildings Programs

	BayREN	PG&E
Program Name	<ul style="list-style-type: none"> • BayREN Business • BayREN Refrigerant Replacement 	<ul style="list-style-type: none"> • Commercial Deemed • Commercial Calculated • Simplified Savings Micro & Small Business Customer Program • Advanced Energy Program for High Tech and Biotech • Healthcare Energy Fitness Initiative • RAPIDS Wastewater Program (Public Sector)

		<ul style="list-style-type: none"> • Government & K-12 Schools Program (Public Sector) • Measured Savings for Summer Reliability Program • Commercial Strategic Energy Management
Eligible Measures	<ul style="list-style-type: none"> • Energy management control systems; • Building envelope modifications; • Electric motors and drives; • Energy related process Improvements; • Lighting Improvements; • HVAC maintenance and replacement; • Heat pump water heaters; • Appliance and plug-load reductions; • Refrigeration & Food Service Equipment Improvements • Direct replacement with synthetic and natural refrigerants • Refrigeration system maintenance training and tools 	<ul style="list-style-type: none"> • 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 • Heat pump water heaters • Heat pump HVAC
Estimated 2026 Budget	\$9,645,416	\$ 27,295,193
Estimated 2027 Budget	\$9,650,592	\$ 29,518,600
Target Audience	Business and property owners and managers of HTR and small food and floral sector businesses as well as those located in DACs and LICs in the Bay Area with eligible annual energy consumption, and their contractors.	<ul style="list-style-type: none"> • 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 • 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	<ul style="list-style-type: none"> • BayREN Business: Resource • BayREN Refrigerant: Non-Resource (Equity) 	Resource

PG&E Program Summary and BayREN Program Distinction

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, launched August of 2023, also 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. 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 are recruited for work in their own communities, are trained in the Direct Install and Add-On opportunities the program offers. They are also 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 equipment upgrades and behavioral changes which leads to further customer interest in energy use strategies.

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.

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.

Measured Savings for Summer Reliability (PGE_Com_006)

Implementer: AESC

The Measured Savings for Summer Reliability Program has the primary objective to reduce peak kW demand utilizing a meter-based approach with a strategic mix of measures and targeted load shapes to maximize Total System Benefit (TSB) delivery. The program provides a customer and aggregator friendly platform for primarily commercial office and retail customers of various sizes to leverage a full range of customer-enabling behavioral and retrofit strategies to shift and reduce load. On-Bil financing is provided on an as-needed basis for customers, and customers are also encouraged to enroll and participate in demand response programs.

Commercial Strategic Energy Management (PGE_Com_009)

Implementer: Stillwater

The Commercial Strategic Energy Management (SEM) program is a holistic, long-term, whole facility approach that uses advanced implementation, measurement and verification services and tools to determine energy savings from all program activities at the facility, including capital projects, maintenance and operation improvements, and retrocommissioning. Participants receive coaching to develop their own energy management practices that will persist beyond their engagement with the program. The Commercial SEM program serves commercial, public, and institutional customers, including but not limited to hospitality, grocery, retail, offices, hospitals, schools, and municipal buildings. Target customer size is medium to large with a minimum annual usage of 1GWh and/or 500,000 therms, with possible exceptions for customers under that threshold based on the total load of a given cohort.

RAPIDS Wastewater Program (PGE_Pub_010)

Implementer: AESC

The RAPIDS Program targeted energy efficiency opportunities 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 Water Wastewater program. The RAPIDS Program is closed to new applications.

California Energy Design Assistance (CEDA) Program (PGE_SW_NC_NonRes)¹⁶

Implementer: Willdan

The CEDA Program has both an all-electric and mixed fuel portion of its program; and serves commercial, public, high-rise multi-family residential, industrial, and agricultural new construction sectors, and major alterations facilities across all of PG&E, SCE, SCG, and SDG&E territories. This Program contributes to the IOUs' efforts to achieve their share of California's ambitious energy efficiency (EE), greenhouse gas reductions, and meet electrification goals by offering EE options tailored to each building during the design and construction process. CEDA also offers technical assistance early in the process when it has the greatest influence on design and operation, driving energy savings beyond code and gathering data to further advance future codes. The CEDA Program enrolls and influences the non-residential new construction market to achieve deeper energy savings and decarbonization goals through key activities such as customer incentives, outreach and education, real-time

¹⁶ The Statewide Nonresidential New Construction Mixed fuel program consists of five Program IDs, one for each sector supported: PGE_SW_NC_NonRes_Com_mixed (commercial), PGE_SW_NC_NonRes_Ag_mixed (agricultural), PGE_SW_NC_NonRes_Ind_mixed (industrial), PGE_SW_NC_NonRes_Pub_mixed (public), PGE_SW_NC_NonRes_Res_mixed (high-rise multifamily residential)

energy modeling, verification, Integrated Demand Side Management (IDSM) support and data tracking to inform future codes and standards.

Government and K-12 Schools Program (PGE_Pub_009)

Implementer: Willdan

The Government and K-12 (GK-12) Comprehensive Program includes a broad offering of EE measures to diverse markets of local governments and K-12 public and charter schools. GK-12 has an emphasis on building electrification, with a strong focus on water heating, which aligns with substantial interest in the government and K-12 sectors. Utilizing the meter-based savings platforms, the Program offers HVAC and Lighting equipment and control system upgrades, retro commissioning recommendations, and behavioral strategies to optimize system efficiencies. The Program is designed to cost-effectively complete all sizes and scopes of projects and has a goal of engaging nearly half of its customers from the HTR and DAC sectors. 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. GK12 operates across PG&E's entire territory.

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 no 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. The program provides financial incentives for non-residential customers to retrofit equipment or systems that exceed applicable code and/or industry standards in existing buildings. Its mission is to offer financial and technical assistance for customers to undertake retro-commissioning (RCx) projects and implement measures that improve facility operations. Largely these elements of service have been built into third-party programs which address most customer circumstances. In instances when third-party programs cannot support a customer, this program will remain open to aid in the development of customer-driven projects.

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.

Using the “2026 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. Since BayREN Business, BRRR, and PG&E's Simplified Savings Program serve small businesses, the parties agree to the following to prevent customer confusion:

- meet approximately every other month 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 targeting those with more energy savings opportunities and BRRR targeting food and floral sector businesses needing refrigeration equipment upgrades.

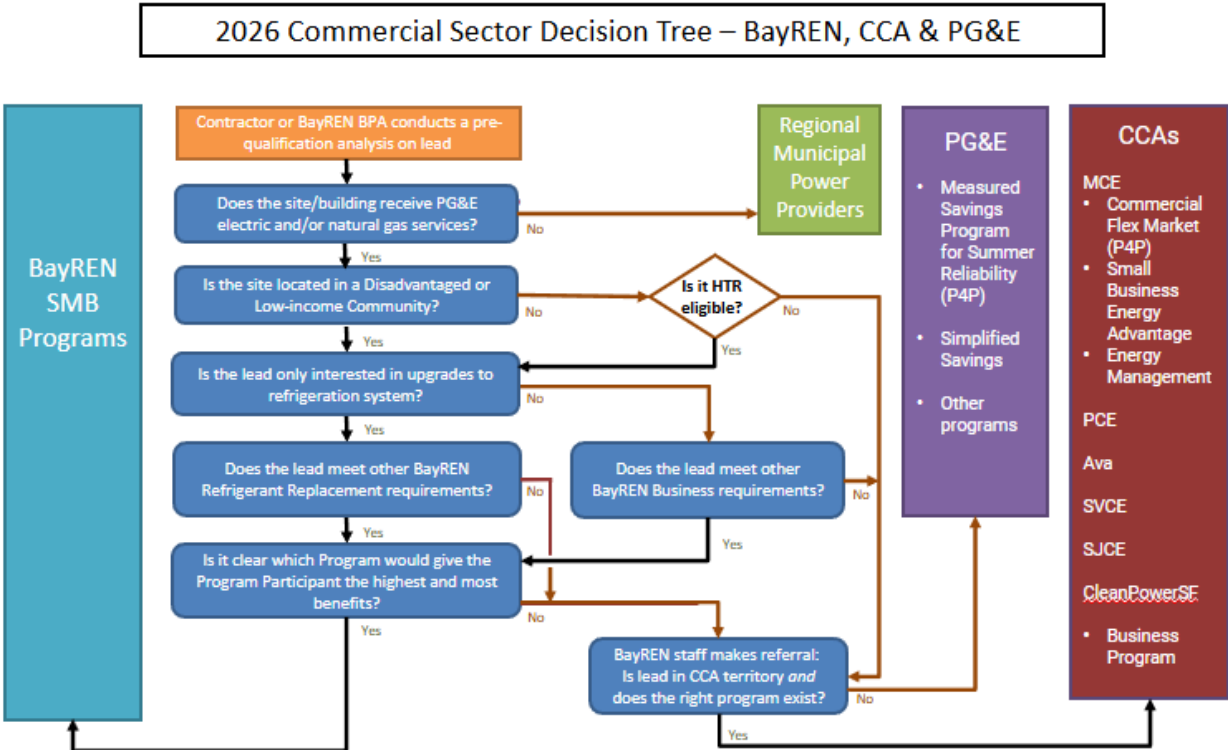
A jointly developed process is in place to prevent double dipping. To check for double-dipping of BayREN Business project applications, its program implementer will coordinate with PG&E’s Data Team to obtain PG&E’s existing program participation data to verify against applications.

To check for double-dipping of BRRR completed projects, 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.

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 2: Coordination Protocol between 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 9: BayREN Small and Medium Commercial Buildings Program Compliance with D.12-11-015

REN Criteria	BayREN Compliance
<p>1. Activities IOU cannot or does not intend to undertake</p>	<p>BayREN Business improves energy efficiency in HTR businesses and businesses located in DAC or LIC using a pay-for-performance approach.</p> <p>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 and floral sector establishments.</p>
<p>2. Pilot activities where there is no IOU program offering and where there is potential for scalability</p>	<p>BayREN provides more technical assistance, is specifically targeted to HTR businesses; businesses located in DAC or LIC; and food and floral sector businesses with low to medium annual energy consumption.</p> <p>The subprograms have the potential for scalability by heavily leveraging local and regional resources (e.g. downstream and midstream programs, OBF, microloan).</p>
<p>3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap</p>	<p>The BayREN Business and BRRR programs are designed to harvest sizable amounts of energy savings cost-effectively in the SMB HTR and food and floral sectors. Participants are qualified under D.23-06-055 which expanded HTR eligibility criteria.</p>

PUBLIC SECTOR

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 launched two new programs to serve the public sector in its nine-county¹⁷ service area: the Integrated Energy Services (IES) Program and the Targeted Decarbonization Services (TDS) Program. BayREN's public sector programs 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: The Energy Coalition (TEC) and kW Engineering

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 includes collecting information on all energy-related 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 provides utility bill analysis, site energy audits, and engineering assessment for public buildings to develop a high-level set of recommended energy efficiency, electrification, DR, and DER actions as needed to meet local energy

¹⁷ 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.

goals. Roadmaps include recommendations for phasing and describe the specific actions needed for implementation.

The IES Program provides two services (Energy Concierge and Energy Roadmapping) that overlap with the PG&E LGP services in three of BayREN’s nine counties. BayREN’s IES Program does not duplicate PG&E’s Local Government Partnership (LGP) programs in these three counties because local governments are not able to access IES services except through the LGPs using the referral system described below in the Coordination Protocol section. These provisions 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)

Implementers: The Energy Coalition (TEC), kW Engineering, and Frontier Energy

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 through improved information, education, and financing for local governments. The TDS program includes a Decarbonization Showcase that enrolls municipal buildings to pilot and demonstrate approaches to building decarbonization and collects and shares 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 engages with local government and special district staff to educate them about decarbonization equipment and strategies for financing it. This service also analyzes available funding and financing mechanisms to identify and address barriers to the adoption of building decarbonization equipment.

Research conducted by BayREN determined that any incentive offerings aligned with the Education and Finance portion of the TDS program would overlap with PG&E’s third party GK-12 resource program¹⁸, since that program offers incentives. As a result, BayREN will not offer incentives under the Education and Finance portion of the TDS program and will instead focus on financing-related support, including identifying financing gaps, building local government capacity to access capital, and testing financing approaches that complement existing utility incentives. BayREN will continue to coordinate with PG&E and the GK-12 program to ensure activities remain complementary and avoid duplication.

Table 10: Summary of Similar BayREN and PG&E Public Sector Programs

	BayREN	PG&E
Program Name	<ul style="list-style-type: none"> Integrated Energy Services (IES) Targeted Decarbonization Services (TDS) 	<ul style="list-style-type: none"> 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*** PG&E_Pub_009: GK12 *** <p>***Potential for PG&E/BAYREN overlap</p>
Eligible Measures	N/A	N/A

¹⁸ PG&E administers this program as part of its Commercial portfolio and the program is described above in the Commercial section.

Estimated 2026 Budget	<ul style="list-style-type: none"> • IES: \$940,611 • TDS: \$1,672,417 	<ul style="list-style-type: none"> • \$12,172,905** • ** total program budget for all 87 LGP contracts
Estimated 2027 Budget	<ul style="list-style-type: none"> • IES: \$1,094,975 • TDS: \$2,142,026 	<ul style="list-style-type: none"> • \$12,044,794** • ** total program budget for all 8 LGP contracts
Target Audience	Local governments and special districts located in the nine-county Bay Area	<ul style="list-style-type: none"> • 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

PG&E Program Summary and BayREN Program Distinction

Local Government Partnerships (LGP) (PGE_Pub)

PG&E's Local Government Partnerships (LGP) 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.

LGP 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.

Government and K-12 Schools Program (PGE_Pub_009)

Implementer: Willdan

Program discussed above in the Nonresidential Section

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 staff should contact. 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 are first referred to the PG&E LGP for support.
- PG&E's LGPs are 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, project financial analysis, program application support, engineering assistance, and inclusion of DERs.

In addition, BayREN coordinated 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 also includes other regional and statewide programs. The database is updated on a quarterly basis to reflect any program changes and new programs.

BayREN will also continue to coordinate with PG&E and the GK-12 program when developing and testing financing options in order to ensure activities remain complementary and there is no duplication.

For ongoing coordination relative to these public sector programs, we intend to meet on a monthly basis.

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 11: BayREN Public Program Compliance with D.12-11-015

REN Criteria	BayREN Compliance
1. Activities IOU cannot or does not intend to undertake	<p>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.</p> <p>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 does not 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 has the option of referring the local government to BayREN's IES program¹⁹.</p> <p>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.</p> <p>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.</p>

¹⁹ As an example, the Marin and San Mateo LGPs do not currently offer equivalent Energy Roadmapping services. Local governments in these LGP territories are able to access BayREN's Energy Roadmapping service when referred by their LGP county representative.

<p>2. Pilot activities where there is no IOU program offering and where there is potential for scalability</p>	<p>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.</p>
<p>3. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap</p>	<p>Not applicable</p>

CROSS-CUTTING SECTOR

BayREN Program Summary – Workforce, Education & Training (WE&T)

Climate Careers (BayREN 09)

Implementer: Rising Sun Center for Opportunity

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.

The program accomplishes this through three stages:

1. Youth Workforce Development:
 - a. Provides on-the-job skills training, installation training, teamwork, customer service, time management, and more. All in service of the Green House Call program.
 - b. Provides upskilling and professional skill advancement through career panels, environmental justice training, and professional development workshops covering topics such as resume writing, mock interviews, cover letters, networking, and financial management.
 - c. The Green House Call program simultaneously serves as a direct install energy efficiency program, as well as an outreach and customer acquisition mechanism for the BayREN EASE Home program.
2. Post Programmatic Pathways:
 - a. Upon completion of the Green House Call portion of the program, the Climate Careers participants continue with paid externship placements.
 - b. Externship placements are with climate and energy related employers, not just EE contractors.
 - c. Placements enable participants to gain real life, first-hand career experiences in positions.
 - d. The intent is to enable youth to explore the wide variety of career options in climate-related fields, while building their resumes, expanding their professional networks, and preparing them for future workforce successes.
3. Future Placement:
 - a. Upon completion of the externship portion of the program, the Climate Careers program will culminate, ideally, with full time employment opportunities with partner agencies.
 - b. The intent is to transition youth into full time opportunities with the same partners that provided them with the externship. If opportunities are not immediately available, Climate Careers aims to provide support and resources to youth participants post program that will enable them to transition into an energy and/or green career.
 - c. The program will also increase the number of individuals with the needed workforce skills and fundamentals required for long and successful careers in sectors experiencing a labor shortage.

Youth participants in the Climate Careers program conduct Green House Calls as their paid on-the-job work experience. Green House Calls are no-cost residential water and energy assessments in the Bay Area. The visit consists of three portions: 1) Basic energy and water assessment of the home, 2) installation of energy and water saving measures and 3) resource and education sharing. Green House Calls are offered to targeted households; including seniors, renters and households where English is not the primary language. Green House Calls directs customers to broader resources, such as the EASE Home program.

In 2026-2027, BayREN may explore additional WE&T pilot projects that support contractor electrification readiness across the Bay Area. BayREN will continue to coordinate with MCE, PG&E, and other contractor training providers to ensure activity is complementary, rather than duplicative.

Table 12: 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	Youth jobs via in-person Green House Calls (energy and water use assessment and installations of measures) and multi-tiered education curriculum (professional development, eco-literacy and financial literacy) with post-program support (externships) for job pathways and opportunities	Provide Disadvantaged Workers with training, support and job placement. Support continues during the first year of employment with the program’s primary metric being the number of participants employed 12 months after training.
Estimated 2026 Budget	\$3,252,543	\$2,200,000 SW
Estimated 2027 budget	\$3,466,783	\$2,200,000 SW
Target Audience in 2026-2027	Youth, ages 15-24, from low-income households and with an emphasis on opportunity youth	Disadvantaged Workers
Resource or Non-Resource	Resource/Non-Resource	Non-Resource (Equity)

PG&E Program Summary and BayREN Program Distinction

Career and Workforce Readiness: Energize Careers (PGE_SW_WET_Work)

Implementer: Strategic Energy Innovations (SEI) through Q2 2026, TBD 2026 - 2027

The Statewide Career and Workforce Readiness (CWR) program administered by PG&E aims to create a diverse and representational energy workforce through the economic empowerment of people who experience personal or systemic barriers to entering and remaining in the energy workforce. Energize Careers assists program participants in accessing technical training and energy career opportunities. It provides holistic services to support disadvantaged workers through technical training, job placement, and wrap-around service support. Energize

Careers also collaborates with pre-apprenticeship programs, apprenticeship programs, community-based training organizations, and community colleges to provide technical energy job training to disadvantaged workers. The program also collaborates with wrap-around service providers and industry partners to provide participants with services and support to enter career pathways where they can leverage their energy efficiency knowledge and skills.

In 2025, PG&E issued a competitive solicitation for a new Statewide WE&T Career & Workforce Readiness (CWR) program that is expected to launch before the end of 2026. The current CWR Program, Energize Careers, will continue its ramp down and close-out in 2026.

While BayREN's Climate Careers program focuses on youth aged 15-24 and provides an +120 hour externship, the Statewide Career and Workforce Readiness program is focused on all ages of disadvantaged workers and seeks to place trainees in jobs and support participants for the first 12 months of employment.

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.12-11-015 Compliance

Table 13: BayREN Climate Careers Program Compliance with D.12-11-015

REN Criteria	BayREN Compliance
1. Activities IOU cannot or does not intend to undertake	BayREN's Climate Careers address workforce needs and fill gaps in the labor market with a youth workforce development program. 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.
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	Climate Careers fills a gap in the labor market by recruiting, training, and developing a youth HTR workforce, ages 15-24, from HTR, DAC and LIC households and with an emphasis on opportunity youth.

BayREN Program Summary – Codes & Standards

Codes & Standards (C&S) program (BayREN03)

Implementer: Frontier Energy

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 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 support improved 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 to increase resource accessibility and adapt to meet varying local needs.

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 District and the Bay Area Regional Collaborative.

Table 14: Summary of Similar BayREN and PG&E Codes & Standards Programs

	BayREN	PG&E
Program Name	Codes & Standards	<ul style="list-style-type: none"> Compliance Improvement (PGE21053) Reach Codes (PGE21054) State Building Codes Advocacy (PGE_SW_CSA_Bldg)
Eligible Measures	N/A	<ul style="list-style-type: none"> N/A
Estimated Budget 2026	\$1,742,080	<ul style="list-style-type: none"> Compliance Improvement: \$6,549,834.22 Reach Codes: \$2,399,904.09 State Building Codes Advocacy: \$4,350,531 (PG&E portion of the statewide program)
Estimated 2027 budget	\$1,690,610	<ul style="list-style-type: none"> Compliance Improvement: \$6,558,401 Reach Codes: \$2,401,689 State Building Codes Advocacy: \$4,350,501 (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.	<ul style="list-style-type: none"> 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

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

PG&E Program Summary and BayREN Program Distinction

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 complementary program offering and services. As the statewide lead for Codes and Standards, PG&E develops resources, checklists, smart tools and training that are comprehensive, effective and useful across the state. PG&E also conducts 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 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.

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)

Implementers: Binary Evolution, Build Smart Group, EnergySoft, Energy Solutions, Gabel Associates, Misti Bruceri and Associates, Mortson Green Building Services, NORESCO, RMS Energy Consulting, Selby Energy

PG&E's Compliance Improvement program assists with improving compliance for both the California Energy Code (Title 24, Part 6) and select portions of the California Green Buildings Standards (Title 24, Part 11 or CALGreen), and California's Appliance Efficiency Regulations (Title 20). Compliance improvement activities complement advocacy work by enabling potential savings from C&S to be realized and persist over time.

The Compliance Improvement program targets market actors throughout the entire compliance supply chain by providing needs-based tools, training, resources, and outreach. Multiple training modalities are used to maximize student participation. A consistent curriculum is developed and delivered statewide by a team of subject matter experts. More information can be found at energycodeace.com.

Reach Codes (PGE21054)

Implementers: Frontier Energy, Misti Bruceri and Associate

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. More information can be found at localenergycodes.com and calgreeninfo.com

State Building Code Advocacy (SW_CSA_Bldg)

Implementers: West Monroe, Energy Solutions, Frontier Energy, McHugh Energy Consultants, TRC

The Statewide Building Codes Advocacy Program supports the CEC's triennial update to the California Energy Code (Title 24, Part 6) to include new EE regulations or to strengthen existing regulations for various technologies or measures. Advocacy activities include the development of Codes and Standards Enhancement (CASE) proposals, research to provide the data needed to advance EE regulations, and participation in the public rulemaking processes. The Program also supports the Energy Commission in preparing recommendations to the Building Standards Commission to update CALGreen. The voluntary energy measures in CALGreen provide foundational elements for local reach codes. Descriptions of the 2028 Energy Code proposals, timeline, and other supporting documentation is available at title24stakeholders.com.

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 will meet in person annually as public health and safety guidance allows. To ensure there is no overlap of compliance improvement or reach code activities, additional coordination protocols have been developed (see Figure 3 below).

Figure 3: Coordination Protocol for Codes & Standards Programs

BayREN Local, Focused		PG&E Statewide, Comprehensive
<ul style="list-style-type: none"> 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 	<p>Compliance Improvement & Trainings & Workshops</p>	<ul style="list-style-type: none"> 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 CEA and AEA mentoring and exam Resources such as trigger sheets, fact sheets, dynamic checklists, and other resources not offered by BayREN Comprehensive T24 Standards Essentials courses, instructional videos and public workshops
<ul style="list-style-type: none"> Facilitates regional reach code and energy efficiency policy efforts Assists local governments in setting priorities, coordinating with state agencies, and tracking results 	<p>Local Government Ordinances & Policy Supports</p>	<ul style="list-style-type: none"> 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
<p>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</p>	<p>Code Update Advocacy</p>	<ul style="list-style-type: none"> Lead development of code enhancement proposals Lead advocacy activities; support public workshops and hearings Support post-adoption work on manuals and software advancements

Compliance Improvement

Each PA's compliance improvement 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.

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.

D.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 15: BayREN Codes and Standards Program Compliance with D.12-11-015

REN Criteria	BayREN Compliance
<p>4. Activities IOU cannot or does not intend to undertake</p>	<ul style="list-style-type: none"> • 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 embedded regional outreach and coordination. PG&E's activities focus on cost effectiveness and other technical support. • BayREN's 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.

REN Criteria	BayREN Compliance
<p>5. Pilot activities where there is no IOU program offering and where there is potential for scalability</p>	<ul style="list-style-type: none"> • 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.
<p>6. Activities in hard-to-reach markets, whether or not there is an IOU program that may overlap</p>	<p>Not applicable</p>

STATEWIDE PROGRAMS

Home Energy Score California Program (BAY_SW_HESC)

Implementer: Earth Advantage

In 2026, BayREN will launch the statewide Home Energy Score (HES) California program. BayREN has delivered an HES program in the Bay Area since 2018 under the Green Labeling program. The HES California program utilizes the U.S. Department of Energy Home Energy Score and tool, which consists of an in-person assessment performed by a certified individual and the delivery of the HES report. The HES report, which has been customized to better serve the California market, provides the home’s energy score from 1-10, with 5 being an average home and 10 the most efficient, estimated GHG emissions, energy use, and energy costs, as well as customized recommendations for making efficiency and electrification improvements and connections to resources to make upgrades. This simple home evaluation tool provides information to homeowners in order to start their energy efficiency journey. BayREN offers a \$250 incentive for voluntary completion of scores (i.e., if not mandated by a local government, such as the City of Berkeley). The HES California program also supports the workforce of energy efficiency professionals by training certified HES Assessors, many of whom are in adjacent industries, such as HERS raters or home inspectors.

PG&E does not offer Home Energy Scores, or similar in-person home energy assessments conducted by a certified professional. Before filing the Tier II Advice Letter for the statewide HES California program, BayREN conducted a landscape assessment of all the PA 2024-2027 Business Plans and concluded there were no substantially similar, overlapping, or duplicative programs.

Statewide Plug Load and Appliance Program

Implementer: In Transition

The Statewide Plug Load and Appliance Program is in transition and may require an additional layer of coordination as the final program is decided.

In 2024, SDG&E filed Advice Letter 4494-E/3332-G²¹ to propose transition of two of its Statewide programs to other Program Administrator leads. The Commission approved the proposal to transition the Plug Load and Appliance Program to Southern California Edison, and the HVAC program to PG&E. Southern California Edison sent a Service List announcement on January 23, 2026 indicating program closure notice, and an Advice Letter to follow in March 2026.

PG&E will share any information about statewide programs that they may have from SDG&E or SCE in Monthly All-PA calls or SWEET calls. 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.

Statewide HVAC Program

Implementer: In Transition

The Statewide Non Residential All Electric HVAC Program is in transition and may require an additional layer of coordination as the final program is decided.

In 2024, SDG&E filed Advice Letter 4494-E/3332-G²² to propose transition of two of its Statewide programs to other Program Administrator leads. The Commission approved the proposal to transition the Plug Load and Appliance Program to Southern California Edison, and the HVAC program to PG&E. The PG&E SW HVAC Program is currently in solicitation at the time of this JCM.

Career and Workforce Readiness: Energize Careers (PGE_SW_WET_Work)

Implementer: Strategic Energy Innovations (SEI) through Q2 2026, TBD 2026 - 2027

Program discussed above in the Cross-cutting Section

Coordination Between Statewide Program(s)

Residential Sector

Residential statewide programs have a description provided. At this time, it has been determined no coordination is necessary between residential regional and residential statewide.

Non-Residential Sector

The Statewide Commercial Programs include the Food Service Point of Sale, Commercial Water Heating, Lighting, Wastewater and Plug Load and Appliance 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.

Public Sector

The Statewide Programs supporting the Public sector include Higher Education Efficiency Performance (HEEP) Program and Water Infrastructure and System Efficiency (WISE) Statewide Initiative, both ran by SCE. 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, and the SCE Program Managers.

²¹ <http://www.sdge.com/rates-regulations/tariff-information/advice-letters>

²² [ibid](#)

Cross-Cutting Sector

Workforce, Education & Training

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.

Codes & Standards

PG&E will coordinate with the Statewide Codes and Standards Advocacy 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.

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 financial and Total System Benefit²³ (TSB) forecast update. 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 AND D.19-12-021

Check D.12-11-015 and D.19-12-021 Threshold Criteria that apply for each program	Comparable PG&E Program if applicable	Comparable Statewide Program	1. Activities that utility or community choice aggregator (CCA) program administrators cannot or do not intend to undertake.	2. Pilot activities where there is no current utility or CCA program offering, and where there is potential for scalability to a broader geographic reach, if successful.	3. Activities serving hard-to-reach markets, whether or not there is another utility or CCA program that may overlap.
BayREN EASE Home (Single Family) (BayREN08)		N/A	XX		XX
BayREN Green Labeling (BayREN07)		N/A	XX	XX	
BayREN BAMBE (Multifamily) (BayREN02)	Multi-Family Energy Savings Program (PGE_Res_003)	N/A	XX		XX
BayREN Business (Commercial) (BayREN06)	<ul style="list-style-type: none"> • Commercial Calculated (PGE21011) • Commercial Deemed (PGE21012)Government & K-12 (PGE_Pub_009) • Advance Energy Program HT/BT (PGE_Com_005) • Measured Savings for Summer Reliability (PGE_Com_006) • Commercial Strategic Energy Management (PGE_Com_009) • Simplified Savings (PGE_COM_SMBZ) 		XX	XX	XX

Check D.12-11-015 and D.19-12-021 Threshold Criteria that apply for each program	Comparable PG&E Program if applicable	Comparable Statewide Program	1. Activities that utility or community choice aggregator (CCA) program administrators cannot or do not intend to undertake.	2. Pilot activities where there is no current utility or CCA program offering, and where there is potential for scalability to a broader geographic reach, if successful.	3. Activities serving hard-to-reach markets, whether or not there is another utility or CCA program that may overlap.
BayREN BRRR (Commercial) (BayREN10)	{same list of Comm programs from above}		XX	XX	XX
BayREN Integrated Energy Services (BayREN11)		N/A	XX	XX	
BayREN Targeted Decarbonization Services (BayREN12)		N/A	XX	XX	
BayREN Climate Careers (Workforce Education & Training) (BayREN09)		N/A	XX		XX
BayREN Codes & Standards (BayREN03)	<ul style="list-style-type: none"> Compliance Improvement (PGE21053) Reach Codes (PGE21054) 	State Building Codes Advocacy (PGE_SW_CSA_Bldg)	XX	XX	
BayREN Statewide Home Energy Score (HES) California (BAY_SW_HESC)		Statewide	XX		

APPENDIX B: BAYREN'S PORTFOLIO SUMMARY OF PROGRAMS OFFERED FOR 2026-2027

REN Program Unique ID	Sector	2026 Annual Budget	2027 Annual Budget	Eligible Measures
BayREN EASE Home (Single Family) (BayREN08)	Residential	\$10,526,465	\$10,582,603	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	\$1,030,979	\$1,030,654	N/A
BayREN BAMBE (Multifamily) (BayREN02)	Residential	\$9,801,101	\$8,646,846	Envelope, HVAC, DHW, lighting, and appliance measures – requires multiple measures, targeting 15-20% savings.
BayREN Business (Commercial) (BayREN06)	Non-Residential	\$4,841,732	\$4,876,746	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; Heat Pump Water Heaters
BayREN BRRR (Commercial) (BayREN10)	Non-Residential	\$4,803,684	\$4,773,846	Refrigeration & Food Service Equipment; Synthetic and Natural Refrigerants; Maintenance Training and Tools
BayREN Integrated Energy Services (BayREN11)	Public	\$940,611	\$1,094,975	N/A
BayREN Targeted Decarbonization Services (BayREN12)	Public	\$1,672,417	\$2,142,026	N/A
BayREN Climate Careers (Workforce Education & Training) (BayREN09)	Cross Cutting	\$3,252,543	\$3,466,783	Youth jobs via in-person Green House Calls (energy and water use assessment and installations of measures) and multi-tiered education curriculum (professional development, eco-literacy and financial literacy) with post-program support (externships) for job pathways and opportunities

REN Program Unique ID	Sector	2026 Annual Budget	2027 Annual Budget	Eligible Measures
BayREN Codes & Standards (BayREN03)	Cross Cutting	\$1,742,080	\$1,690,610	N/A
BayREN Statewide Home Energy Score (HES) California (BAY_SW_HESC)	Statewide Residential	\$4,305,600	\$4,761,600	N/A

APPENDIX C: PG&E'S PORTFOLIO SUMMARY OF PROGRAMS OFFERED FOR 2026-2027

For information on PG&E's portfolio of programs, please see *Pacific Gas and Electric Company's 2025 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 2026-2027 Mid-Cycle Advice Letter (Advice 5141-G/7752-E) can be found on PG&E's website at: [GAS 5141-G.pdf \(pge.com\)](#); PG&E's Energy Efficiency Annual Report for 2025, filed on 5/1/2026 can be found on CPUC's website at: [CEDARS.cpuc.ca.gov](#)

²⁵ For additional information:
[PG&E's 2026 Filing Module](#)

[PG&E's 2027 Filing Module](#)