California Public Utilities Commission

ADVICE LETTER SUMMARY

ENERGY UTILITY

MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No.: San Francisco Bay Area Regional Energy Network (BayREN) (#941)

Utility type:
☑ ELC ☑ GAS ☐ WATER
☐ PLC ☐ HEAT

Contact Person: Jennifer K. Berg
Phone #: (415) 820-7947
E-mail: jberg@bayareametro.gov
E-mail Disposition Notice to: jberg@bayareametro.gov

EXPLANATION OF UTILITY TYPE
ELC = Electric GAS = Gas WATER = Water
PLC = Pipeline HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: 21-E

Tier Designation: 2

Subject of AL: 2022-2023 Energy Efficiency Program and Portfolio Budget Request for BayREN

Keywords (choose from CPUC listing):

AL Type: ☐ Monthly ☐ Quarterly ☑ Annual ☐ One-Time ☐ Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #:
In compliance with D.15-10-029, D.18-05-041, D.21-05-031 and D.21-09-037.

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL:

Summarize differences between the AL and the prior withdrawn or rejected AL:

Confidential treatment requested? ☐ Yes ☑ No

If yes, specification of confidential information:
Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:

Resolution required? ☐ Yes ☑ No

Requested effective date: 12/8/21

No. of tariff sheets:

Estimated system annual revenue effect (%): N/A

Estimated system average rate effect (%): N/A

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: N/A

Service affected and changes proposed[1]: NONE

Pending advice letters that revise the same tariff sheets: NONE

[1]Discuss in AL if more space is needed.

Clear Form

Protests and all other correspondence regarding this AL are due no later than 20 days after the date of this submittal, unless otherwise authorized by the Commission, and shall be sent to:

CPUC, Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102
Email: EDTariffUnit@cpuc.ca.gov

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Clear Form

ENERGY Advice Letter Keywords

Affiliate	Direct Access	Preliminary Statement
Agreements	Disconnect Service	Procurement
Agriculture	ECAC / Energy Cost Adjustment	Qualifying Facility
Avoided Cost	EOR / Enhanced Oil Recovery	Rebates
Balancing Account	Energy Charge	Refunds
Baseline	Energy Efficiency	Reliability
Bilingual	Establish Service	Re-MAT/Bio-MAT
Billings	Expand Service Area	Revenue Allocation
Bioenergy	Forms	Rule 21
Brokerage Fees	Franchise Fee / User Tax	Rules
CARE	G.O. 131-D	Section 851
CPUC Reimbursement Fee	GRC / General Rate Case	Self Generation
Capacity	Hazardous Waste	Service Area Map
Cogeneration	Increase Rates	Service Outage
Compliance	Interruptible Service	Solar
Conditions of Service	Interutility Transportation	Standby Service
Connection	LIEE / Low-Income Energy Efficiency	Storage
Conservation	LIRA / Low-Income Ratepayer Assistance	Street Lights
Consolidate Tariffs	Late Payment Charge	Surcharges
Contracts	Line Extensions	Tariffs
Core	Memorandum Account	Taxes
Credit	Metered Energy Efficiency	Text Changes
Curtailable Service	Metering	Transformer
Customer Charge	Mobile Home Parks	Transition Cost
Customer Owned Generation	Name Change	Transmission Lines
Decrease Rates	Non-Core	Transportation Electrification
Demand Charge	Non-firm Service Contracts	Transportation Rates
Demand Side Fund	Nuclear	Undergrounding
Demand Side Management	Oil Pipelines	Voltage Discount
Demand Side Response	PBR / Performance Based Ratemaking	Wind Power
Deposits	Portfolio	Withdrawal of Service
Depreciation	Power Lines	

Clear Form

November 8, 2021

California Public Utilities Commission
Energy Division Tariff Unit
505 Van Ness Ave.
Fourth Floor
San Francisco, CA 94102-3298

Advice Letter 21-E

(BayREN ID #941)

Subject:

BayREN 2022-2023 Bi-Annual Energy Efficiency Program and Portfolio Budget Request

Purpose

The purpose of this advice filing is to seek approval for the San Francisco Bay Area Regional Energy Network's ("BayREN") Bi-Annual Energy Efficiency Program and Portfolio Budget ("BBAL") for program years 2022 and 2023, as directed in California Public Utilities Commission ("CPUC" or "the Commission") Decision ("D") 21-05-031.

BayREN is a collaboration of the nine counties that make up the San Francisco Bay Area. Led by the Association of Bay Area Governments ("ABAG")[1], BayREN implements effective energy saving programs on a regional level and draws on the expertise, experience, and proven track record of Bay Area local governments to develop and administer successful climate, resource, and sustainability programs. Since its inception, BayREN's programs have followed the criteria first articulated by the California Public Utilities Commission ("Commission" or "CPUC") in D.12-11-015: filling gaps in the market; serving hard-to-reach markets; and piloting new approaches to programs that have the potential to scale.

Background

In D.14-10-046, the Commission approved the Rolling Portfolio funding, and provided that 2015 is "year zero" insofar as we are leaving 2015 programs and funding in place until the earlier of when we provide superseding direction, or 2025."[2] In D.16-08-019, the Commission directed that: "existing approved activities [of the RENs] may have ongoing funding that was previously approved."[3] In D.18-05-041, BayREN's Business Plan and Budgets for the term of the Rolling Portfolio was approved with slight modifications. D.19-12-021 allowed for the continued operation of existing RENs and directed that they be permanent program administrators removing the "pilot" designation.

D.15-10-028 established that on the first business day in September, each Program Administrator ("PA") shall file a Tier 2 advice letter for continued collection of Energy Efficiency (EE) funding from

[1] On July 1, 2017 ABAG underwent a staff consolidation with the Metropolitan Transportation Commission (MTC). ABAG and its Executive Board continue to exist.
[2] D.14-10-046 at page 31.
[3] D.16-08-019 at page 10.

ratepayers. This filing, which envisions ministerial review, is intended to formalize the Program Administrator's annualized budget which shall remain in place until superseded by Commission or Commission Staff action on the new budget.[4]

Most recently in D.21-05-031, Program Administrators were directed to combine both program years 2022 and 2023 into one Advice Letter.[5]

Discussion

1. BayREN 2022 and 2023 Budget Request

BayREN requests a total portfolio and Evaluation, Measurement and Verification ("EM&V") spending budget of $26,164,659 for Program Year (PY) 2022 and $26,682,993 for PY2023. This combined total of $52,847,652 is within the 2018-2025 budget cap authorized in D.18-05-041. This represents a slight increase in the annual budgets for the program years as set forth in the business plan. The change in annual budgets is proposed to come from prior years' unspent funds. The Commission has provided staff the authority to approve this request since BayREN's overall budget request is well within the Rolling Portfolio cap and is less than 20 percent of unspent funds from previous years.[6] The budget breakdown by sector and the energy savings is provided in Table 1 (2022) and Table 2 (2023).

[4] D.15-10-028, at pages 59-60.

[5] D.21-05-031, page 52. The date to file the combined ABAL was extended to November 1, 2021 and later extended via letter from Edward Randolph to November 8, 2021.

[6] In D.18-05-041, the Commission provided that the overall amount of funding through 2025, as reflected in the business plans, essentially serves as a cap on program administrators' total spending for the business plan period. In adopting such a cap on overall spending, the Commission expressly allowed staff discretion to dispose of a PA's portfolio budget request that exceeds the corresponding annual funding amount included in its business plan, plus unspent funds from previous years in the business plan period, through the ABAL review process. *See* D.18-05-041, at page 132. Specific to RENs, the forecasted budget must not exceed the annual budget in the approved business plan for the program year for which the ABAL requests budget authority, plus any unspent funds from previous years in the business plan period, by more than 20 percent. D.18-05-041, at page 134.

Table 1: BayREN 2022 Budget and Savings (Net)[7]

Line	Sector	Program Year (PY) 2022 Budget	FORECAST ENERGY SAVINGS (Net) PA forecast kWh	PA forecast kW	PA forecast therms (MM)	PA Forecast Elec CO2	PA Forecast GasCO2
	Resource Acquisition Program Segment						
	Residential	$0	-	-	-	-	-
	Commercial	$3,822,347	4,599,900	605	0.01	1,191	80
4	**PA Subtotal (does not include ESA budget and savings)**	**$3,822,347**	**4,599,900**	**605**	**0.01**	**1,191**	**80**
	Resource Acquisition Forecasted Total System Benefit (TSB)	$6,286,277					
	Resource Acquisition Forecasted Total Resource Cost (TRC)	$5,954,604					
	Portfolio Forecasted Portfolio Administrator Cost (PAC)	$3,765,034					
	Market Support Program Segment						
	Residential	$2,879,500	-	-	-	-	-
	Commercial	$0	-	-	-	-	-
4	**PA Subtotal (does not include ESA budget and savings)**	**$2,879,500**	**-**	**-**	**-**	**-**	**-**
	Resource Acquisition Forecasted Total System Benefit (TSB)	$0					
	Portfolio Forecasted Total Resource Cost (TRC)	$2,879,500					
	Portfolio Forecasted Portfolio Administrator Cost (PAC)	$2,879,500					
	Equity Program Segment						
	Residential	$16,574,376	-	-	-	-	-
	Commercial	$0	-	-	-	-	-
4	**PA Subtotal (does not include ESA budget and savings)**	**$16,574,376**	**-**	**-**	**-**	**-**	**-**
	Resource Acquisition Forecasted Total System Benefit (TSB)	$2,223,719					
	Portfolio Forecasted Total Resource Cost (TRC)	$14,597,620					
	Portfolio Forecasted Portfolio Administrator Cost (PAC)	$16,931,172					
	Portfolio						
	Residential	$19,453,876	6,384,434	185	0.12	(131)	2,070
	Commercial	$3,822,347	4,599,900	605	0.01	1,191	80
4	**PA Subtotal (does not include ESA budget and savings)**	**$23,276,223**	**10,984,334**	**790**	**0.13**	**1,060**	**2,150**
5	**CPUC Savings Goal (w/o C&S)**		10,984,334	790	0.13	1,060	2,150
6	**Forecast savings as % of CPUC Savings Goal (w/o C&S)**	NA	100.0%	100.0%	100.0%	100.0%	100.0%
7	**Total EM&V [7]**	$1,046,586					
7a	PA EM&V	$287,811					
7b	ED EM&V	$758,775					
	Portfolio Forecasted Total System Benefit (TSB)	$8,509,996					
	Portfolio Forecasted Total Resource Cost -TRC (w/o C&S and w/ EM&V)	$24,478,310					
	Portfolio Forecasted Portfolio Administrator Cost (PAC)	$26,464,142					
	Portfolio Forecasted Ratepayer Impact Measure (RIM)	$26,464,142					
8	**Codes and Standards**	$1,841,850					
9	**PA Spending Budget Request[1]**	$26,164,659					
10	**(LESS) PA Uncommitted and Unspent Carryover Balance[2]**	$3,410,599					
11	**CEC AB 841 Program Funding [3]**						
12	Applicable percentage (70%) of difference between funding limitation and 2020 budget	$0					
13	PA 2020 and Beyond Uncommitted and Unspent Carryover Balance [4]	$0					
14	**CEC AB 841 Total Program Funding**	$0					
15	**PA Revenue Requirement Request (Cost Recovery) [5]**	$22,754,060					
	% of Equity and Market Support Program Budgets to PA Spending Budget Request (not to Exceed 30%)	74%					
16	**PA Authorized Budget Cap (D.18-05-041)**	23,720,000					
17	**Total PA (IOU+CCAs+RENs) Recovery Budget[6]**	$22,754,060					

[1] This is the IOU's requested EE Portfolio budget. This is the budget by which the Statewide Program compliance budget requirement of 25% will be measured.

[2] ~~The balance of unspent uncommitted must reflect the total unspent uncommitted from pre-2020 EE authorized budgets Jan 1 2018 through Dec 31 of current year (PY-1). Because each ABAL is filed in Q3, this unspent uncommitted amount will be an estimate for the year in which the ABAL is filed.~~ Because AB 841 does not apply to BayREN, this total includes the pre-2020 and 2020 Uncommitted and Unspent Carryover Balance.

[3] See D.21-01-004 Tables 2 (2022) and 3 (2022)

[4] Because each ABAL is filed in Q3, this unspent uncommitted amount will be an estimate for the year in which the ABAL is filed.

[5] The amount of funds to be collected (cost recovery) for the PA EE Program Year = Line 9 - Line 10 + Line 12

[6] Total amount to be requested in ~~IOU's PPP advice letter for their programs,~~ REN's ~~and CCAs in their~~ service territory, Line 15+ Line 21 + Line 22

[7] For IOUs, EM&V costs only includes IOU's Total EM&V budget (PA + ED) and does not include REN or CCAs EM&V budget. For RENs & CCAs, include EM&V-PA Budget and EM&V-ED ~~= $0~~.

[7] BayREN's 2022 Budget and Savings table has been modified to show only sectors with planned program activity and formatted to fit this page. The full version of the table has been uploaded to CEDARS in the original format.

Table 2: BayREN 2023 Budget and Savings (Net)[8]

Line	Sector	Program Year (PY) 2023 Budget	FORECAST ENERGY SAVINGS (Net) PA forecast kWh	PA forecast kW	PA forecast therms (MM)	PA Forecast Elec CO2	PA Forecast GasCO2
	Resource Acquisition Program Segment						
	Residential	$0	-	-	-	-	-
	Commercial	$3,956,347	6,985,438.07	920.34	0.02	1,888.31	116.32
4	**PA Subtotal (does not include ESA budget and savings)**	**$3,956,347**	**6,985,438**	**920**	**0.02**	**1,888**	**116**
	Resource Acquisition Forecasted Total System Benefit (TSB)	$10,185,086					
	Resource Acquisition Forecasted Total Resource Cost (TRC)	$7,446,128					
	Portfolio Forecasted Portfolio Administrator Cost (PAC)	$3,887,155					
	Market Support Program Segment						
	Residential	$2,985,600	-	-	-	-	-
	Commercial	$0	-	-	-	-	-
4	**PA Subtotal (does not include ESA budget and savings)**	**$2,985,600**	**-**	**-**	**-**	**-**	**-**
	Resource Acquisition Forecasted Total System Benefit (TSB)	$0					
	Portfolio Forecasted Total Resource Cost (TRC)	$2,985,600					
	Portfolio Forecasted Portfolio Administrator Cost (PAC)	$2,985,600					
	Equity Program Segment						
	Residential	$16,874,376	-	-	-	-	-
	Commercial	$0	-	-	-	-	-
4	**PA Subtotal (does not include ESA budget and savings)**	**$16,874,376**	**-**	**-**	**-**	**-**	**-**
	Resource Acquisition Forecasted Total System Benefit (TSB)	$2,246,051					
	Portfolio Forecasted Total Resource Cost (TRC)	$14,979,077					
	Portfolio Forecasted Portfolio Administrator Cost (PAC)	$17,176,929					
	Portfolio						
	Residential	$19,859,976	4,968,325.87	226.97	0.13	(29.18)	1,771.58
	Commercial	$3,956,347	6,985,438.07	920.34	0.02	1,888.31	116.32
4	**PA Subtotal (does not include ESA budget and savings)**	**$23,816,323**	**11,953,764**	**1,147**	**0.15**	**1,859**	**1,888**
5	**CPUC Savings Goal (w/o C&S)**		11,953,764	1,147	0.15	1,859	1,888
6	**Forecast savings as % of CPUC Savings Goal (w/o C&S)**	NA	100.0%	100.0%	100.0%	100.0%	100.0%
7	**Total EM&V** [7]	$1,067,320					
7a	PA EM&V	$293,513					
7b	ED EM&V	$773,807					
	Portfolio Forecasted Total System Benefit (TSB)	$12,431,137					
	Portfolio Forecasted Total Resource Cost -TRC (w/o C&S and w/ EM&V)	$26,478,124					
	Portfolio Forecasted Portfolio Administrator Cost (PAC)	$26,916,354					
	Portfolio Forecasted Ratepayer Impact Measure (RIM)	$26,916,354					
8	**Codes and Standards**	$1,799,350					
9	**PA Spending Budget Request**[1]	$26,682,993					
10	**(LESS) PA Uncommitted and Unspent Carryover Balance**[2]	$0					
11	**CEC AB 841 Program Funding** [3]						
12	Applicable percentage (70%) of difference between funding limitation and 2020 budget	$0					
13	PA 2020 and Beyond Uncommitted and Unspent Carryover Balance [4]	$0					
14	**CEC AB 841 Total Program Funding**	$0					
15	**PA Revenue Requirement Request (Cost Recovery)** [5]	$26,682,993					
	% of Equity and Market Support Program Budgets to PA Spending Budget Request (not to Exceed 30%)	74%					
16	**PA Authorized Budget Cap (D.18-05-041)**	24,605,000					
17	**Total PA (IOU+CCAs+RENs) Recovery Budget**[6]	$26,682,993					

[1] This is the IOU's requested EE Portfolio budget. This is the budget by which the Statewide Program compliance budget requirement of 25% will be measured.

[2] ~~The balance of unspent uncommitted must reflect the total unspent uncommitted from pre-2020 EE authorized budgets Jan 1 2018 through Dec 31 of current year (PY-1). Because each ABAL is filed in Q3, this unspent uncommitted amount will be an estimate for the year in which the ABAL is filed.~~ Because AB 841 does not apply to BayREN, this total includes the pre-2020 and 2020 Uncommitted and Unspent Carryover Balance.

[3] See D.21-01-004 Tables 2 (2022) and 3 (2022)

[4] Because each ABAL is filed in Q3, this unspent uncommitted amount will be an estimate for the year in which the ABAL is filed.

[5] The amount of funds to be collected (cost recovery) for the PA EE Program Year = Line 9 - Line 10 + Line 12

[6] Total amount to be requested in ~~IOU's PPP advice letter for their programs,~~ REN's ~~and CCAs in their~~ service territory, Line 15+ Line 21 + Line 22

[7] For IOUs, EM&V costs only includes IOU's Total EM&V budget (PA + ED) and does not include REN or CCAs EM&V budget. For RENs & CCAs, include EM&V-PA Budget and EM&V-ED ~~= $0~~.

[8] BayREN's 2023 Budget and Savings table has been modified to show only sectors with planned program activity and formatted to fit this page. The full version of the table has been uploaded to CEDARS in the original format.

2. Discussion of Proposed Program and Portfolio Changes and COVID-19 Impacts

A. COVID-19 Impacts

As our region began to lift COVID-19 restrictions in 2021, there was a resumption of some indoor activities but not all of those activities - particularly online trainings and forums - proved to be very successful. BayREN's program goals for the three resource programs will largely be met in 2021 with the exception of the Commercial program since its focus is on the small business sector and many businesses have either closed permanently or temporarily while there were shelter-in-place restrictions. This program is making significant progress as small businesses throughout the region begin to reopen.

BayREN programs will remain largely the same in 2022 and 2023 but will explore new activities in furtherance of and to inform the new business plan, as directed by D.21-05-031.

B. 2022-2023 Programs and Portfolio Segmentation

In D.21-05-031, the Commission acknowledged that equity and market support activities were at risk of being cut from Program Administrators' portfolios due to increased overall cost-effectiveness constraints. The Commission articulated a new policy intended to "reduce the conflict between cost-effectiveness and other equally or more important policy objectives such as equity and support for the energy efficiency market."[9] In furtherance thereof, all program administrators are directed to segment the sectors in their portfolios based on the primary purpose: 1. Resource Acquisition; 2. Market Support; or 3. Equity.[10]

In 2021, BayREN commenced an extensive strategic planning process that readily aligns with the guidance for the new business plans as well as the portfolio segmentation requirements as directed by the CPUC. Overlaying the future planning is the vision: "By 2025, BayREN's organization, resources and programs will evolve to more intentionally integrate equity, while filling gaps and addressing barriers to energy efficiency and electrification, as an essential part of meeting State climate and energy goals."

While "equity" programs have been defined in D.21-05-031 and are being further refined by the CAEECC working group, as directed by the Commission, BayREN has its own *additive* definition. For BayREN, equity means addressing systemic barriers to energy efficiency and electrification, especially for, and in collaboration with, equity priority communities[11] and those who disproportionately face energy burdens, climate impacts, and are underrepresented in policy and decision-making. Thus, even for programs that are not deemed to be in the equity segment, BayREN's equity principles will be incorporated into the program design and outreach strategies.

Below is a description of each program, proposed changes in 2022 and 2023, as well as the proposed segmentation.

[9] D.21-05-031, pages 13-13.
[10] D.21-05-031, page 52-53.
[11] This term has been adopted by ABAG, MTC and member jurisdictions and replaces "Communities of Concern". This was the result of a process undertaken by staff following the regional - and national - reckoning, and an agency acknowledgment of the power of language and that words can shape people, actions and culture.

Residential

Multifamily

Bay Area Multifamily Building Enhancements ("BAMBE")

This program offers free technical assistance ("TA") to multifamily property owners. Following an energy assessment, if the property owner implements measures that result in a minimum of 15% energy savings, they are eligible for a flat rebate of $750 per unit. The BAMBE program won national recognition by ACEEE for exemplary program design in this difficult to serve market.

In 2022 and 2023, BayREN will continue the core program model of providing no cost TA and rebates to incentivize multifamily property owners to make energy efficiency improvements. To prioritize underserved multifamily property types, the system of project pipeline prioritization will continue to target small, deed restricted and naturally occurring affordable, and/or owner occupied and collectively run structures (i.e. HOAs).

The success of this program, coupled with the targeting criteria of the properties served has allowed BayREN to form successful partnerships with various agencies and nonprofit entities resulting in a more expansive program that addresses benefits in addition to energy savings. Specifically, in 2021, in partnership with the Bay Area Air Quality Management District, Alameda County Asthma Start, and Contra Costa County, the program developed an initiative that more intentionally directs energy efficiency upgrades to families with asthma and/or live in neighborhoods with high levels of outdoor air pollution. This partnership was recently awarded a $2 million grant from the CA Attorney General's office to fund the initiative. BayREN intends to use this pilot as proof of concept to support regional expansion.

In 2022, TA services will be expanded to include customized, wrap-around project management assistance and capacity-building activities (such as property owner and resident knowledge sharing and training) to targeted participants, with the goal of continuing to learn how to best reach this underserved market sector and to inform future modifications to incentive and program delivery structure.

Expanded TA services will be available to owners of eligible multifamily properties meeting at least one of the following characteristics:

- Naturally Occurring Affordable Housing
- Properties that are near sources of air pollution (i.e. major freeway corridors)
- Smaller properties (definition of "small" will vary by county)
- Locally owned properties – or properties that are owned by individuals living in the state, or small entities registered in the state

Additional characteristics may be added after community engagement and input.

These targeted activities seek to offer co-benefits including:

- Community health for vulnerable communities
- Improved resilience for vulnerable communities
- Project management capacity issues
- Wholistic approaches to sustainability in multifamily buildings by working with other local agencies (i.e. counties that also work on recycling, water conservation, etc.)

This program modification will not substantially increase the total budget, but will result in a decline of units served, as the focus will be less on the volume of units served, and more on targeting and working with the property types listed above.

Clean Heating Pathway

The Clean Heating Pathway is an optional add-on to the BAMBE program that provides additional incentives to participants interested in pursuing a scope of work that includes one or more electrification measures and no gas-to-gas measures. On the customer-facing side, a project must result in an estimated .25 $MTCO_2$ reduction per unit to qualify. Due to the higher costs and complexity associated with electrification measures, the program provides incentive add-ons that vary by measure type. BayREN intends to continue to offer this pathway in 2022 and 2023, and eventually merge electrification into the BAMBE program.

Portfolio Segmentation

Both BAMBE and the BAMBE Clean Heating Pathway are proposed to be equity programs. The program prioritizes small, affordable (both deed restricted and naturally occurring affordable) properties as well as projects that have scopes of work that highlight tenant savings based on developed criteria. Further, the TA offered is designed to be flexible and to meet property owners where they are.

This program also has elements of market support through partnerships with other public agencies, CBOs and county agencies working on public health, water conservation, recycling, etc., as well as Bay Area CCAs that are providing non-ratepayer funds for increased incentives.

Since each project must achieve a minimum of 15% energy savings, there are also elements of Resource Acquisition.

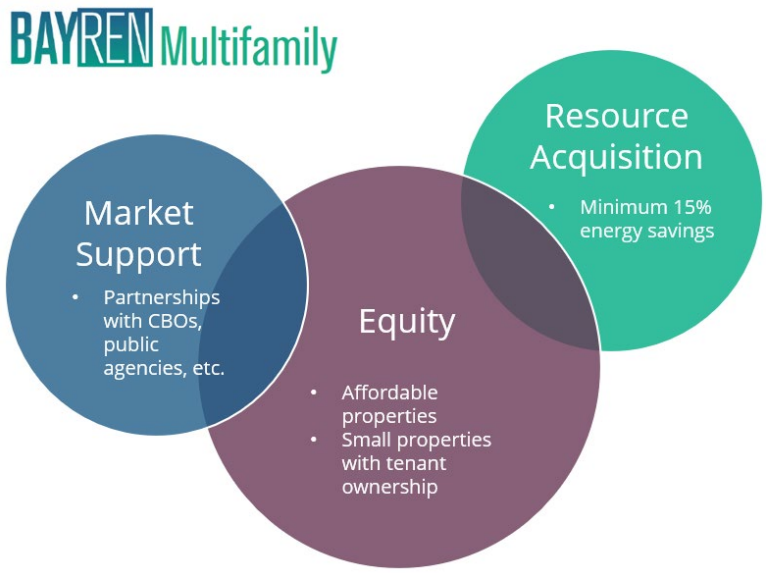

Figure 1: BayREN Multifamily Program Proposed Portfolio Segmentation

Single Family (Home+)

BayREN will continue to focus on moderate income households (both homeowners and renters), a population that is consistently underserved in ratepayer energy efficiency programs throughout the state, and is a market sector that is difficult to serve. The program previously defined moderate income as households with an annual income of $48,000-$125,000 regardless of household size or location. To better reach this underserved market and to avoid duplication with income qualified programs, BayREN will revise the program definition of moderate income to households who do not qualify for income qualified weatherization programs[12] up to the moderate-income level per household by county, as designated by the California Department of Housing and Community

[12] https://www.csd.ca.gov/Pages/LIHEAP-Income-Eligibility.aspx

Development[13]. The intent of this change is to better reach those households in the middle; that is, those that exceed the income qualifications for weatherization programs, but cannot afford to do a retrofit without an incentive or some other form of assistance. Tailoring the income definition by county, will help to ensure that those counties that require more assistance will be better served by the program.

In 2022 and 2023, BayREN will place greater focus on outreach to households that primarily speak a language other than English. Historically, these communities have been underserved by rebate programs due to factors such as a lack of trust in government sources and the absence of translated materials. BayREN will place greater emphasis on developing relationships with trusted messengers including media outlets, community organizations and public figures that resonate with the community.

With the assistance of a grant from the Bay Area Air Quality Management District – which ended in 2021 – BayREN formed successful partnerships with several CCAs that allowed for greater incentives for electrification measures (specifically heat pump water heaters) to joint customers. In addition to larger incentives, the successful partnerships also resulted in a streamlined application process benefiting both the consumers and contractors. In 2022, BayREN will continue to strengthen and expand these partnerships. Indeed, BayREN is working with the implementer of the statewide TECH program to provide streamlined processing of rebates and enrollment of contractors to increase the affordability of heat pump heating and cooling and heat pump water heaters. In 2022, BayREN will continue to coordinate with other providers to improve supply chain availability, increase contractor participation, and conduct joint marketing.

The focus on contractor enrollment in the past few program years has been successful and there is now a sustained increase in application volume. With a greater number of contractors and higher project volume, several issues have been identified as market obstacles, including a shortage of a trained workforce, especially those with an energy efficiency construction background. Tellingly, survey results of our participating contractors revealed that a majority have been actively seeking new employees to help meet the market demand but have been unsuccessful. In response to this new challenge, the Home+ program is actively engaging workforce development and construction training organizations to connect trainees and graduates to our participating contractors. In 2022, BayREN will continue to build these partnerships with a special emphasis on creating career pathways for underserved populations. Additionally, commencing in Q4 2021 and continuing in 2022 at a minimum, outreach will be prioritized to contractors that speak a second language through an enrollment bonus. Engagement with community-based organizations like the Hispanic Chamber of Commerce to provide information on how to enroll in different languages, has begun.

The Green House Calls program will continue in 2022 and 2023. This program is offered in partnership with Rising Sun Center of Opportunity and is a direct install program that is targeted specifically at households that have historically low program participation, including renters, non-English speaking and low income households. The energy efficiency measures are installed with trained youth that are from the communities that are the focus of the program. In 2021, Rising Sun began to pilot a career development pathway for the graduates of the Green House Calls program, in which they are placed in paid externships with various employers in the energy sector. The youth also learn about different career paths through informational interviews at these partner organizations. These activities will continue in 2022 and 2023 and will be the foundation for the new workforce, education and training program that will be proposed in the business plan.

[13] https://www.hcd.ca.gov/grants-funding/income-limits/state-and-federal-income-limits/docs/income-limits-2021.pdf

In 2022, the BAMBE and Home+ program teams will seek to address an existing issue of how to better serve smaller rental properties with 1-4 units. While BAMBE has had success serving properties that are 5+ units, there has been very little uptake in 1-4 unit rental housing as the incentive amount is low as there are no economies of scale to be realized. Home+ can technically serve 1-4 unit rental properties, but the program structure seems to be less attractive to rental property owners. Many Naturally Occurring Affordable Housing, family-owned properties fall within the 1-4 unit range. Some areas of exploration that will be prioritized in 2022 in an effort to better serve this underserved market sector include:

- Would providing technical assistance be a cost-effective solution for the owner/manager?
- Can we increase uptake by focusing on owners and management companies rather than occupants?
- Can we make a greater impact by engaging management companies as a key gatekeeper?
- Would a similar/identical program design to BAMBE allow Home+ to leverage already occurring outreach?

BayREN is committed to better serving this market.

Portfolio Segmentation

Given the Home+ program focus on difficult to serve moderate income single family homeowners and renters, a population that is consistently underserved in ratepayer energy efficiency programs throughout the state, the program is proposed as an equity program. There will continue to be increased focus on homeowner outreach in Spanish and English, through program materials, radio and television time, and workshops. The contractor outreach and trainings in other languages will also be expanded, and a bonus will be provided to participating contractors that are minority, women-owned businesses, and those that provide services in languages in addition to English.

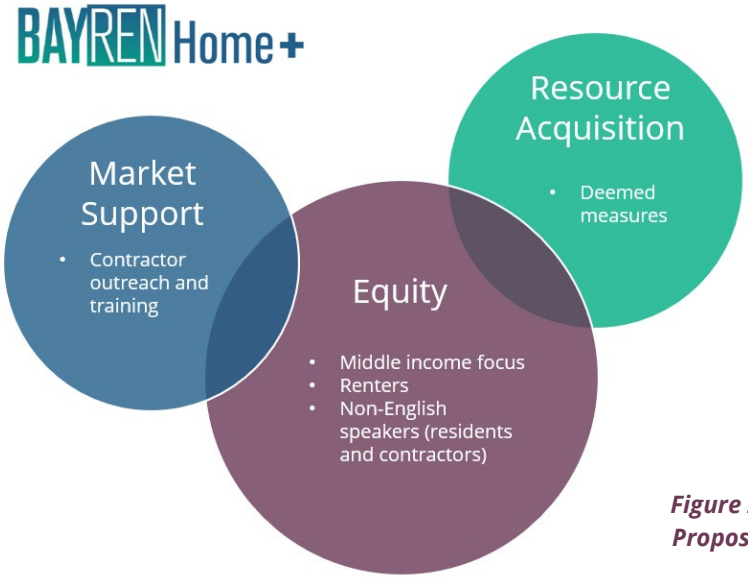

Figure 2: BayREN Home+ Program Proposed Portfolio Segmentation

There are clear market support elements in this program as education regarding energy efficiency is provided to customers by the Energy Advisors, BayREN member public agencies that do much of the program outreach, and the participating contractors. Additionally, a large focus of this program is bringing in more contractors to energy efficiency and providing training on a regular basis.

This is a resource program and uses deemed measures for savings calculations.

Green Labeling

The Green Labeling program enables market recognition of the value of a green home during real estate transactions and complements other market transformation strategies such as incentives and financing. Program activities are generally divided into two buckets: home labeling and real estate trainings.

Home labeling activities promote and aim to grow demand for the U.S. Department of Energy's Home Energy Score ("HES"), which scores a home from 1 to 10 on its energy efficiency and provides custom recommendations for improvements in the form of a report. This program element also involves enrolling, training, and supporting Home Energy Score Assessors, who are eligible for a rebate after completion of a score. The number of rebates significantly increased in 2021 and demand is projected to remain high in 2022.

In 2020, the Green Labeling program expanded the rebate offerings to include a $100 "kicker" rebate if a home is re-scored after energy efficiency upgrades have been made and a $100 rebate for completing the optional electrification checklist. As the Electrification Checklist pilot concludes, the bonus rebate for completing the checklist will be decreased to $50 in 2022 and may phase out completely in 2023. The $100 post-improvement "kicker" incentive will not be offered in 2022-2023 due to low participation.

BayREN real estate trainings for realtors, lenders, underwriters, and appraisers explain how energy efficiency can be integrated into the real estate market and how to properly value and promote energy efficiency features. A series of continuing education-style trainings for real estate professionals, designed to build ongoing relationships, were added in 2021 covering in-depth topics such as electrification and marketing energy efficient homes. These trainings will continue in 2022.

In the new business plan, BayREN will propose that Green Labeling be expanded to a statewide program (with BayREN as the lead PA), working with regional partners across the state. In 2022 and 2023, BayREN will pilot activities in furtherance of statewide administration including continued outreach to regional partners, market analysis, and working with the DOE. BayREN will also reach out to other implementers of statewide HES programs to understand best practices and opportunities to improve the Assessor and user interface of the data collection tool and database. These activities will be absorbed by the 2022 and 2023 budgets.

Portfolio Segmentation

Green Labeling is proposed be in the market support segment because one of the main program goals is to make energy efficiency information standard in the real estate marketplace. To accomplish this, program activities aim to increase the disclosure and transparency of information using the Home Energy Score. Training of HES Assessors and real estate professional build both demand and capacity for energy efficiency around the time of major renovations, energy efficiency upgrades, and real estate transactions. Moreover, it supports the expanded skills set of Assessors.

Figure 3: BayREN Green Labeling Program Proposed Portfolio Segmentation

There are equity components to this program as transparency into EE features of a home can help provide homeowners or renters of single-family properties insight into home comfort and projected utility bills - a leading factor in applying for payday loans in California. Indeed, a 2016 ACEEE study found that while low-income families paid less overall on utility bills, they paid more per square foot compared to other income levels. Moreover, disconnection rates of low-income customers in California were high before the pandemic, and over the past year, has been exceptionally high across the state. These findings reinforce that low energy consumption can be a necessity of the inability to pay bills and not from living in an energy efficient home. An energy asset rating like HES can help decouple low energy consumption due to an inability to pay or other behavior/equity-related reasons from low energy consumption due to living in an energy efficient home. In a low-income or equity setting, it is crucial to pair transparency with assistance for upgrades. Therefore, BayREN aims to partner with interested counties to pilot using HES in conjunction with low-income qualified upgrade programs or lead abatement programs.

Another equity component for this program that will roll out in 2022 is that materials and course curriculum will be translated into languages other than English.

While this program is non-resource, there are still resource acquisition elements. The HES report offers recommendations for how the home energy score can be improved. These recommendations align with the Home+ (resource) program. Additionally, by training real estate professionals about the benefits of a "green" property, this information can be communicated to the parties to the real estate transaction, who can then make informed decisions about potential retrofits.

Commercial

The COVID-19 pandemic has left many businesses – particularly small businesses – in a financially fragile state. Many are uncertain about the near-term future, and some are facing existential crises. BayREN Business will continue to be responsive to the changing needs of this hard-hit sector. Continuing in 2022 and 2023, the BayREN Small-and-Medium (SMB) Commercial Pay-for-Performance (P4P) Program (the Program) will assist SMB owners and entrepreneurs in the Bay Area recover from the COVID-19 pandemic which has caused long-term impacts that vary from business to business. Some business in this sector, such as grocery and convenience stores, increased energy consumption during the pandemic, while others, such as fitness centers, retail stores, and restaurants, experienced prolonged shutdowns but are now poised to bounce back to serve pent-up consumer demand. Therefore, in 2022, the Program will target specific sectors: restaurants, grocery and convenience stores, retail, fitness centers, offices, and mix-used facilities (with predictable energy consumption). This focus will continue to be reevaluated to ensure these businesses still have the greatest need. BayREN Business will continue to try to assist with economic recovery post-pandemic with this targeted outreach and also by messaging that the Program could directly reduce businesses' utility costs through energy efficiency. Therefore, in 2022, the Program intends to increase incentive levels to further reduce project costs, decrease utility costs, and put those savings back into the businesses.

Since inception, the Program has used a P4P program design. By tying incentive payments (over 24 months) to metered, verified energy savings, ratepayers are protected from paying for non-existent energy savings. Moreover, this design motivates the implementer and program participant to sustain the savings. To that end, in 2022, all projects will receive 24/7 equipment monitoring as a part of the retrofit. Using the latest-available Avoided Cost Calculator, the Program is expected to have a positive total resource cost.

The Program will also support innovations by improving normalized metered energy consumption (NMEC) measurement and verifications (M&V) standards. Acting through its third-party M&V provider, the Program will provide feedback of its population-based "comparison group" to the industry NMEC working group. This real-world feedback will improve statistical accuracy of the comparison group M&V, particularly in the SMB sector. It will also guide the development of updates to existing NMEC standards and the CPUC's "Rulebook on NMEC Programs."

Finally, health and safety will continue to be prioritized in 2022. Although vaccines and other public health tactics are proving successful in slowing the pandemic, the onset of new variants are concerning. The Program will continue to provide a summary of county, state and other health protocols to program participants.

In 2020, the microloan program element was sunsetted as the financing partner changed its focus to a statewide initiative that does not focus on energy efficiency technologies. While the microloan will continue to be available to small businesses, the loan may be used for measures and products beyond energy efficiency and is therefore no longer a feature of the BayREN Business program.

Portfolio Segmentation

This is a resource acquisition program since the primary purpose of this P4P Program is energy savings.

The Program also has strong equity components. The Commercial chapter of the "2018-2025 BayREN Business Plan" described in detail why the SMB sector has had historically low participation rate (<5%) in energy efficiency programs. Despite the benefit of reduced utility and maintenance costs, SMB owners and managers are often resource constrained: they lack the time, expertise, and funds to implement energy

efficiency interventions. Hard-to-reach (HTR) businesses are further disadvantaged due to language, business size, and split-incentive. In 2022, the Program intends to have a diversity of projects, and will require that at least 20% of the total projects be HTR. The Program will work with counties to increase marketing efforts in Disadvantaged Communities (DAC), provide an incentive-kicker for businesses in DACs, and explore partnerships with local jurisdictions to increase awareness of and access to the Program.

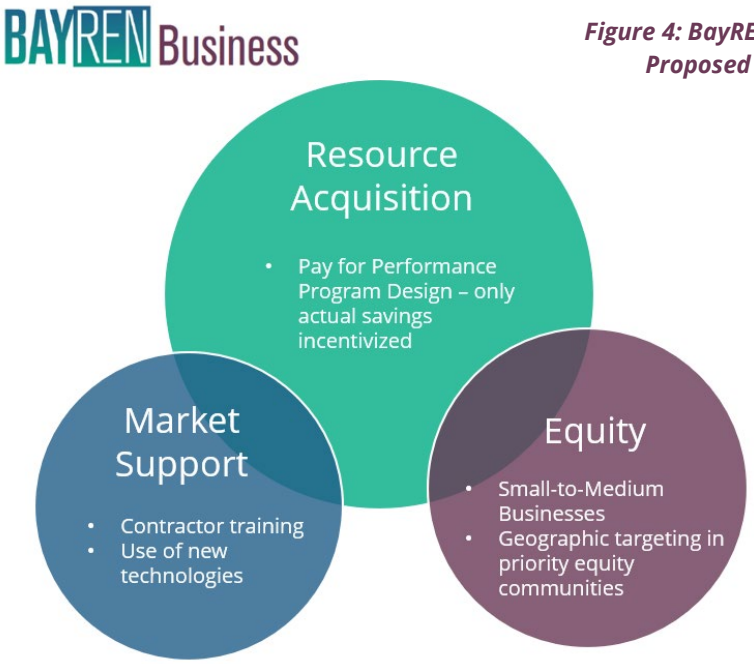

Figure 4: BayREN Commercial Program Proposed Portfolio Segmentation

BayREN Business has components of market support in that training is provided to contractors. Further, new technologies, such as energy management systems, are part of the program and are accompanied with ongoing training on the appropriate use.

Water Upgrades $ave Program

Water Upgrades $ave (formerly known as the Water Bill Savings Program) is a collaboration of BayREN and ABAG to help Bay Area residents and businesses upgrade their properties to be more water efficient using an on-bill financing offer through their local water utility. The program aligns with the CPUC's Water-Energy Nexus initiative. This financing product is based on the Pay-As-You-Save® (PAYS®), tariff on-bill model: Water utility customers install eligible efficiency improvements with little-to-no up-front cost — and repay project costs with a monthly on-bill charge that is significantly lower than the estimated savings — so they begin saving right away.

The Program uses ABAG-sourced capital (i.e., not CPUC rate-payer funds) to facilitate water utility investment in customer-side water conservation upgrades.

With input from Partner Water Utilities, the Program conducts targeted customer outreach with direct mail campaigns featuring a co-branded letter from the utility and a program brochure. The direct mail campaigns

are supported by utility website content, local outreach channels (e.g., e-newsletters), and targeted local social media.

2022–2023 Program goals include: Launch a small/medium business service offer for water conservation measures; expand the utility enrollment campaign; enroll two to three additional water utilities a year (seven to eight total by the end of the third year of field services [2023]); establish a scalable finance service capital plan and fund through 2032; initiate targeted customer marketing activities in Partner Utility territories; expand CRM platform as new utilities join; research/integrate new water conservation upgrades aligned with State water policy (e.g., leak detection/repair); use new research to pursue improved calculation of embedded energy savings from water conservation to support achieving resource-program status; explore opportunities to use the PAYS® model for electrification upgrades related to water service (i.e., heat pump water heaters) to complement but not duplicate services from other Program Administrators; and monitor activities and refine as needed.

With dire drought conditions throughout the BayREN territory, this program is poised for continuous growth.

Portfolio Segmentation

Water Upgrades $ave aligns with the market support segment because it focuses on building partnerships with the Bay Area's 66 municipal water utilities to help them invest in customer-side water efficiency; moving toward greater cost effectiveness by expanding markets for and reducing the cost of high-efficiency water upgrades that produce water-heating savings for customers and embedded energy savings for utilities. Customer education is provided through free onsite water assessments.

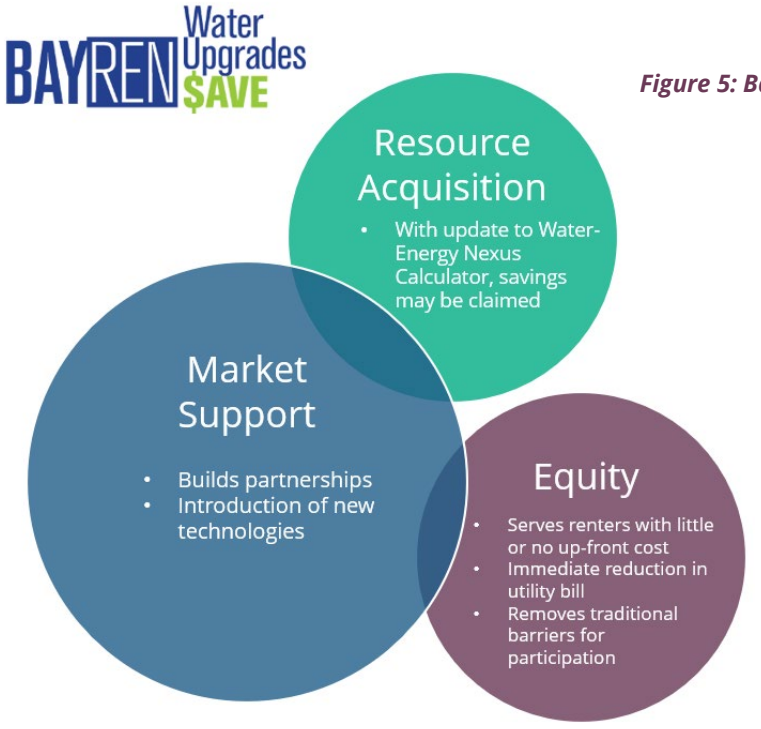

Figure 5: BayREN Water Upgrades $ave Program Proposed Portfolio Segmentation

There are equity components of the program as it serves renters; provides little-to-no upfront-cost service that does not require new consumer debt, a credit check, or a lien; and enables program participants to immediately lower household utility bills while using a portion of their savings to pay the project cost

over time with an on-bill charge. The program model removes traditional cost barriers for hard-to-reach, underserved, and disadvantaged community members.

While energy savings are not currently claimed, as the CPUC Water-Energy Nexus Calculator is updated and refined to be incorporated into the TSB calculator, this program will likely seek to claim energy savings in the future.

Codes & Standards

BayREN's Codes and Standards (C&S) Program supports Bay Area local governments on development, adoption, and enforcement of state and local energy codes and policies. As part of that work, the Codes Program offers many kinds of training and resources to local building departments to aid them in enforcing the Energy Code and improving compliance. BayREN is also partnering with the TECH Program to explore ways to improve and expedite permitting for heat pump technologies through their Permitting Pilot Project and expects to develop several related resources to offer local governments. The program also provides free technical assistance to jurisdictions seeking to upgrade their buildings to Zero Net Energy or Zero Net Carbon (ZNE/ZNC), in order to support and encourage adoption and implementation of policies requiring buildings to meet a ZNE or ZNC standard. In addition, the C&S program holds quarterly Regional Forums on energy code and policy-related topics, specifically for local government staff, and also holds regular calls and provides technical assistance and resources to support staff working on reach codes or other energy policies. Finally, the Codes Program works to connect local and state efforts, so that local staff are aware of work occurring at the state level, and state staff are aware of challenges and opportunities at the local level. These and similar activities will continue into 2022 and 2023.

In the business plan for 2024 – 2032, BayREN anticipates proposing one or more programs serving the public sector, including a technical assistance program. We expect that the existing Municipal Zero Net Energy/Zero Net Carbon Technical Assistance effort will become part of that program. During 2022-2023, we anticipate potentially piloting related technical assistance activities and data gathering in order to support that transition.

Portfolio Segmentation

While Codes & Standards Programs are separate from market segmentation requirements[14]BayREN's C&S program is a cross-cutting program that supports other BayREN programs and has elements that support all three segments.

The market support elements including training building departments on Energy Code requirements and piloting new technologies that enable building department staff to ensure compliance while also avoiding unnecessary delays or complications in the permit process. Additionally, the program provides resources and some training for contractors in order to acquaint them with newer technologies such as heat pump water heaters and help them ensure that their work is code-compliant. By supporting reach code adoption, the C&S program increases demand for above-code technologies and construction methods. Finally, the Municipal ZNE/ZNC Technical Assistance component of the C&S program regularly recommends above-code technologies to local governments for use in their buildings.

Equity elements are also present in this program. Increasing compliance with the Energy Code helps to ensure that all people receive the benefits of legal, safe, and code-compliant construction, not only those

[14] D.21-05-031, page 16.

who can afford to pay more. Many of the program activities lead to more energy-efficient buildings, which have lower energy costs for and provide health benefits to occupants. BayREN also provides equity perspectives in discussions and resources relative to reach codes and energy policies, so that local government staff are aware of these perspectives and can take them into account when shaping local codes and policies.

While there are no claimed energy savings, there are strong resource acquisition components to this program. Increasing compliance with and enforcement of state and local energy codes ensures that the energy savings in the codes are actually achieved. The program supports the adoption and implementation of reach codes and energy policies at the local level, which leads to increased energy savings. Also, local governments save energy directly when they implement recommendations from the Municipal ZNE/ZNC Technical Assistance component of the C&S program.

Figure 6: BayREN Codes & Standards Program Proposed Portfolio Segmentation

3. Proposed Updated 2022-2023 Portfolio Goals

BayREN programs have evolved to adapt to the markets and customers which they serve which by CPUC directive, are difficult to serve. From an increase focus on hard to reach and disadvantaged communities, to responsiveness to COVID-19 pandemic impacts, programs have taken steps to best assist the communities which they serve. Additionally, significant changes have been made to the avoided cost inputs and availability of cost-effective energy saving technologies. Despite these significant changes, BayREN's portfolio goals have remained unchanged since the 2019 Annual Budget Advice Letter true-up. Therefore, with this budget advice letter BayREN proposes updated savings goals in Table 3 as described D.21-09-037 section 6 and in line with Ordering Paragraph 5[15].

Table 3: BayREN Proposed Updated Savings Goals

	2022			2023		
Sector	**Net kWh**	**Net kW**	**Net Therm**	**Net kWh**	**Net kW**	**Net Therm**
Residential	6,384,434	185	116,005	4,968,326	227	127,310
Commercial	4,599,900	605	13,680	6,985,438	920	19,883
Codes & Standards	-	-	-	-	-	-
Total	**10,984,334**	**790**	**129,685**	**11,953,764**	**1,147**	**147,193**

[15] D.21-09-037, Section 6, page 23 – 24, Ordering Paragraph 5, page 30.

4. Strategies for Increased Cost-Effectiveness

Given the RENs' directive to focus on filling gaps, piloting different or unique approaches that have the potential to scale and/or targeting hard-to-reach customers, there is not a particular cost-effectiveness threshold applied. This was reaffirmed in D.19-12-021: "Because RENs are designed to fill gaps and serve hard-to-reach customers, and because their portfolios are smaller, their program offerings are likely to be naturally less cost-effective than the larger portfolios of the utilities."[16]

BayREN has three resource programs and for all, continually strive to increase cost-effectiveness. However, our piloting of unique activities (consistent with the Commission criteria for the RENs) that cannot be undertaken by other program administrators given cost-effective limitations, can hamper these efforts. Reasons for the decrease in the TRC as well as strategies for increasing the cost effectiveness of these resource programs in 2022 and 2023 are:

Single Family

Due to a combination of a revised calculation method and continued increase in adoption of fuel substitution measures, BayREN is anticipating a higher TRC than 2021. The new TRC calculation methods were revised to no longer penalize fuel substitution measures and are, instead, responsible for a significant portion of the kWh savings for the program.

The leveraging of marketing by other non-ratepayer funded programs,[17] especially for heat pump water heaters has also increased the popularity of these measures without a corresponding increase in marketing and outreach costs. The launch of the TECH program in October 2021 for heat pump water heaters and in 2022 for heat pumps for space conditioning should also increase uptake with little to no additional outreach expense.

The return to pre-pandemic project volumes in 2021 has increased projected program uptake in 2022 and 2023. This has improved the cost effectiveness of the program by increasing projected savings without a corresponding increase in the implementation budget. The number of Green House Calls has also increased to above historic levels without any additional funding, which will improve the overall TRC.

Finally, an increased focus on enrolling new contractors has increased project volume in the near term but also engenders long-term sustainable growth. Many of the new contractors are focused on fuel substitution measures, which will subsequently improve the cost-effectiveness overall. In 2022 and 2023, BayREN will continue to seek opportunities to grow our contractor base, leverage other rebate programs and marketing efforts, and promote fuel substitution measures that provide greater savings.

Multifamily

In 2021 and beyond BayREN will continue to expand the Clean Heating Pathway, which serves multifamily projects with scopes of work that include electrification measures and provides additional incentives. BayREN also started prioritizing populations for which it has been difficult to obtain savings. In response to the COVID-19 pandemic, the program began offering to phase incentive payments to accommodate projects with cash flow concerns. Our long-term strategy will be to communicate marketability and non-energy benefits to participants in order to build market awareness around energy efficiency and electrification as we prepare to transition away from rebates. Additionally,

[16] D.19-12-021, Finding of Fact 10, page 82.

[17] This includes funding from a Bay Area Air Quality Management District Grant, as well as partnerships with several CCAs. Additional incentives from the TECH program will also be layered onto Home+.

ongoing coordination with other Bay Area Multifamily Program Administrators is designed to support the efficient use of ratepayer funds. BayREN has also modified the way that it accounts for energy efficiency improvements within the Clean Heating Pathway program. In the goals for the upcoming years, therm savings that result from natural gas water heating and other energy efficiency measures are shown separately from the therm savings that result from fuel substitution measures (the latter of which are converted to kWh savings in the CET). Also, in previous years, all measures were shown with a single baseline and marked as "Normal Replacement." BayREN will use a more conservative approach in the future, and mark projects as "Accelerated Replacement" – projecting a second baseline that results in zero savings for the period after the remaining useful life of the replaced equipment has expired. "Lopping off" the savings at that point is quite conservative and neglects the savings that are expected to actually continue to occur in the second period, but in the absence of guidelines on how to establish that second baseline, this conservative approach is proposed. The result of this change is a dramatically reduced TRC for these programs in the upcoming years, although the first-year energy savings are not affected.

Commercial

In program years 2022 and 2023, the BayREN Business Program will continue to strive to achieve a high cost-effectiveness. The pay-for-performance nature of the incentive structure and the rigorous measurement and verification processes ensure equipment installation is maximizing ratepayer funds and not paying for non-existent savings. The pandemic has made many small- and medium-sized businesses concentrate on core competencies, rather than upgrades. As a result, should data and trends continue to indicate the sector's financially fragile state, sustaining high levels of incentives – paying a premium for energy efficiency – may be required. At the same time, with an eye on cost-effectiveness, the BayREN Business will continue to pilot a stepped, metered approach to increasing incentives in 2022.

Budget Changes

BayREN seeks a modest increase in the 2022 and 2023 business plan budget as follows:

Single Family: BayREN is requesting additional funding which reflects a decrease in incentives and an increase in implementation and marketing than what was requested in the Business Plan budget. The incentive level has been adjusted for a modest 6% increase over the 2021 budget rather than the original 25% increase. Due to the greater focus on equity, BayREN anticipates needing a larger budget for implementation of tasks such as community engagement, translation, and marketing in ethnic media channels.

Multifamily: BayREN is requesting a decrease in average annual funding in the BAMBE program and an increase in funding in the BAMBE Clean Heating Pathway. With an increased focus on decarbonization, the additional funding will support greater integration of electrification measures.

Green Labeling: BayREN is requesting an increase for implementation and marketing budget. The increase in the implementation budget will allow BayREN to comply with the DOE's QA/QC requirements and keep up with processing scores, the number of which has been on an upward trajectory. This request supports the growth in the Home Energy Score rebate program, enrollment of new Assessors, adapting trainings, and responding to Bay Area trends and goals regarding electrification. In 2023, the program initially intended to begin scaling down the incentive amounts and while the 2023 BBAL budget reflects a reduced incentive total, it is not as steep of a decrease as outlined in the business plan budget. This change reflects the need for a slower ramp down, coupled with an increase in implementation and marketing activities, to continue to embed energy efficiency in the real estate market to a place where incentives are no longer needed.

BayREN is also requesting a small increase in the Marketing budget in order for the BayREN member county agencies to engage deeper with the real estate community and promote the Home Energy Score.

Water Upgrades $ave

An increase of $92,200 from the business plan budget is requested for activities that were not envisioned at the time the plan was filed in part due to new state policies. The activities include: Monitor/support ABAG finance service process, and create long-term plan for scalable ABAG capital (e.g., bond funding as cited in SB 564 — Water Bill Savings Act [2017]); expand utility enrollment activities to respond to drought impact; research/integrate new upgrades aligned with state water policy (e.g., leak detection/repair); use new research to pursue improved calculation of embedded energy savings from water conservation to support achieving resource-program status; and explore opportunities to use the PAYS® model for electrification upgrades. This scope of tasks is greater than had been envisioned when submitting the 2018 business plan budget.

In 2021, the Program officially launched in the City of Sebastopol providing indoor upgrades. The Program's primary focus is water utility and customer enrollment. At the same time, it is developing several new initiatives to increase Program value and ensure it can successfully scale.

EMV Budget

BayREN is requesting its full PA EMV budget of $287,811 in 2022, and $293,513 in 2023. This will be used for new and continued process evaluation, support with the Business Plan due in February 2022, ongoing assistance to ensure proper tracking and reporting on metrics and funding for the California Technical Forum (CalTF). The Electronic Technical Reference Manual ("eTRM") serves a critical function in energy efficiency program design and implementation. Resolution E-5152 and D.21-05-031 have adopted biennial update schedules for DEER and updated methodologies for new measure analysis - both of which are dependent on the eTRM. As BayREN engages in portfolio and program development, the inclusion of CalTF funding in the BBAL will ensure that our efforts are aligned with Commission direction and the evolution of measures that contribute to decarbonization strategies. CalTF had previously been funded by the IOUs, but that funding has been scaled back. As a program administrator, BayREN seeks to contribute to this effort that benefits all administrators and implementers.

5. Metrics

As directed in D.18-05-041 Ordering Paragraph 9, the metrics, targets and indicators for BayREN's portfolio and for the specific programs, were filed on May 15, 2021, along with BayREN's 2020 Annual Energy Efficiency Report. A complete list of metrics, targets and indicators, both current and proposed value metrics, is included in Attachment A: ABAL Attachment A.

6. Program Implementation Plans/Implementation Plans

BayREN has uploaded to CEDARS revised redlined and clean versions of the Implementation Plans (IPs) for all programs. The changes are relatively minor and include the 2022 and 2023 program budgets.

7. List of Attachments

Attached hereto are the following:

Attachment A: ABAL Attachment A
Attachment B: Supplemental Budget Filing
Attachment C: CEDARS Confirmation Sheet
Attachment D: Proposed Portfolio Segmentation

Protest

Anyone may protest this Advice Letter. The Protest must state the grounds upon which it is based. The Protest must be made in writing and received by the Commission within 20 days of the date this Advice Letter was filed with the Commission, or November 28, 2021. There is no restriction on who may file a protest. The address for mailing or delivering a protest to the Commission is:

California Public Utilities Commission
CPUC Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102

Copies of the protest should also be sent via e-mail to the attention of the Energy Division at EDTariffUnit@cpuc.ca.gov. It is also requested that a copy of the protest be sent by email to address shown below on the same date it is mailed or delivered to the Commission.

Jennifer K. Berg
Director - Energy Programs
Association of Bay Area Governments
375 Beale Street
7th Floor
San Francisco, CA 94105
JBerg@bayareametro.gov

Bay Area Regional Energy Network (BayREN)

Advice Letter 21-E

2022-2023 BBAL

Attachment A – ABAL Appendix

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Y 2022-2023

Spending Budget Comparison	**2022**	**2023**
Tab 3 - PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	$ 26,164,659	$ 26,682,993
Tab 4 - PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	$ 26,164,659	$ 26,682,993
Tab 7 - PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	$ 26,164,659	$ 26,682,993
Tab 8 - PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	$ 26,164,659	$ 26,682,993
Tab 9 - PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	$ 26,164,659	$ 26,682,993
Difference	-	-

Revenue Requirement or Cost Recovery Comparison	**2022**	**2023**
Tab 4 - PA Revenue Requirement Request	$ 25,873,062	$ 26,682,993
Tab 7 - PA Revenue Requirement Request (Cost Recovery)	$ 22,754,060	$ 26,682,993
Difference	3,119,002.06	-

	2022				**2023**			
Program Budget by Cost Category	**Admin**	**Mktg**	**DINI**	**DI Incentive**	**Admin**	**Mktg**	**DINI**	**DI Incentive**
Tab 4 - Program Budgets	$ 1,854,000	$ 2,730,018	$ 9,784,055	$ 10,750,000	$ 1,858,000	$ 2,600,718	$ 10,106,955	$ 11,050,000
Tab 8 - Caps & Targets	$ 1,854,000	$ 2,730,018	$ 9,784,055	$ 10,750,000	$ 1,858,000	$ 2,600,718	$ 10,106,955	$ 11,050,000
Difference	-	-	-	-	-	-	-	-
Tab 9 - Incentives Column, EE Total				$ 10,750,000				$ 11,050,000
Difference				-				-

Unspent/Uncommitted compared to CEC 2020 and beyond	**2022**	**2023**
Tab 4 - CEC value 2020 and Beyond amount	$ -	$ -
Tab 3 - Table 3d - 2020 and 2021 Unspent/Uncommitted	$ 2,981,888	$ -
Difference	(2,981,888.31)	-

	2022										
Portfolio Budget Total vs Budget by Function Summary Total	**Residential**	**Commercial**	**Industrial**	**Agricultural**	**Public**	**Emerging Tech**	**Codes & Standards**	**WE&T**	**Finance**	**Cross Cutting**	**OBF Loan Pool**
Tab 7 - PA Portfolio Budget by Function	$ 19,453,876.00	$ 3,822,347.00	$ -	$ -	$0	$0	$1,841,850	$ -	$ -	$1,841,850	$ -
Tab 9 - PA Portfolio Budget by Function	$ 19,453,876.00	$ 3,822,347.00	$ -	$ -	$ -					$ 1,841,850.00	$ -
Difference	-	-	-	-	-					-	-

	2023										
	Residential	**Commercial**	**Industrial**	**Agricultural**	**Public**	**Emerging Tech**	**Codes & Standards**	**WE&T**	**Finance**	**Cross Cutting**	**OBF Loan Pool**
Tab 7 - PA Portfolio Budget by Function	$ 19,859,976.00	$ 3,956,347.00	$ -	$ -	$0	$0	$ 1,799,350.00	$ -	$ -	$ 1,799,350.00	$ -
Tab 9 - PA Portfolio Budget by Function	$ 19,859,976.00	$ 3,956,347.00	$ -	$ -	$ -					$ 1,799,350.00	$ -
Difference	-	-	-	-	-					-	-

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
(This Table applies only to the IOU PAs)

Table 1 -Bill Payer Impacts - Rates by Customer Class				
	Electric Average Rate (Res and Non-Res) $/kwh	**Gas Average Rate (Res and Non-Res) $/therm**	**Total Average Annual Bill Savings by Year ($)**	**Total Average Lifecycle Bill Savings ($)**
Present Rates - System Average				
2021*				
2022				
2023				

* = Based on [relevant date] current effective rates

Total Average Annual Bill Savings by Year ($) Electric Average Rate (Res and Non-Res) $/kwh * Total First Year Electric Net Savings KWH + Gas Average Rate(Res and Non-Res) $/therm * Total First Year Gas Net Savings Therm

Total Average Lifecycle Bill Savings ($) Electric Average Rate (Res and Non-Res) $/kwh * Total Lifecycle Electric Net Savings KWH + Gas Average Rate(Res and Non-Res) $/therm * Total Lifecycle Gas Net Savings Therm

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
(This Table applies only to the IOU PAs)

Table 2a - Electric Bill Payer Impacts - Current and Proposed Revenues and Rates, Total and Energy Efficiency, by Customer Class

Customer Classes	2021 Proposed Energy Efficiency Electric Annual Revenue Change $000	2021 Proposed Percentage Change In Electric Revenue and Rates	2021 Electric Average Rate $/kWh	2021 Energy Efficiency Portion of Electric Average Rate $/kWh	2022 Proposed Energy Efficiency Electric Annual Revenue Change $000	2022 Proposed Percentage Change In Electric Revenue and Rates	2022 Electric Average Rate $/kWh	2022 Energy Efficiency Portion of Electric Average Rate $/kWh	2023 Proposed Energy Efficiency Electric Annual Revenue Change $000	2023 Proposed Percentage Change In Electric Revenue and Rates	2023 Electric Average Rate $/kWh	2023 Energy Efficiency Portion of Electric Average Rate $/kWh

* = Based on [relevant date] current effective rates

Table 2b - Gas Bill Payer Impacts - Current and Proposed Revenues and Rates, Total and Energy Efficiency, by Customer Class

Customer Classes	2021 Proposed Energy Efficiency Gas Annual Revenue Change $000	2021 Proposed Percentage Change In Gas Revenue and Rates	2021 Gas Average Rate $/kWh	2021 Energy Efficiency Portion of Gas Average Rate $/kWh	2022 Proposed Energy Efficiency Gas Annual Revenue Change $000	2022 Proposed Percentage Change In Gas Revenue and Rates	2022 Gas Average Rate $/kWh	2022 Energy Efficiency Portion of Gas Average Rate $/kWh	2023 Proposed Energy Efficiency Gas Annual Revenue Change $000	2023 Proposed Percentage Change In Gas Revenue and Rates	2023 Gas Average Rate $/kWh	2023 Energy Efficiency Portion of Gas Average Rate $/kWh

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023

Table 3 - Budget and Cost Recovery by Funding Source

Table 3a - PA Spending Budget Request by Funding Source

PA EE Programs and EM&V	2022	2023
Annual PA Spending Budget Request (Program and EM&V total)	$ 26,164,659	$ 26,682,993
CEC AB 841 Program Budget Request		
Applicable percentage of difference between funding limitation and 2020 budget (70% f 2022 and 60% for 2023) [1]	$ -	$ -
Plus 2020 and Beyond Uncommitted and Unspent Carryover Balance	$ -	$ -
PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	**$ 26,164,659**	**$ 26,682,993**

1 Applicable percentage is 70% for 2022 and 60% for 2023.

Table 3b - Budget by Funding Source

Portfolio Budget (Before Carryover)	2022 Budget	2022 %Allocation	2023 Budget	2023 %Allocation
Electric Procurement EE Funds	$ 21,455,020	82%	$ 21,346,394	80%
Gas PPP Surcharge Funds	$ 4,709,639	18%	$ 5,336,599	20%
Total Funds	**$ 26,164,659**		**$ 26,682,993**	

Table 3c - Revenue Requirement for Cost Recovery by Funding Source

Authorized Funding in Rates (including Unspent/Uncommitted Funds)	2022 Revenue Requirement	2022 %Allocation after Carryover adjustment	2023 Revenue Requirement	2023 %Allocation after Carryover adjustment
Electric Procurement EE Funds	$ 18,658,329	82%	$ 21,346,394	80%
Gas PPP Surcharge Funds	$ 4,095,731	18%	$ 5,336,599	20%
Total Funds	**$ 22,754,060**		**$ 26,682,993**	

Table 3d - Unspent/Uncommitted Carryover Funds (in positive $ amounts)

	2022			2023		
Program Unspent/Uncommitted Funds	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
Pre-2020	$ 239,110	$ 52,487	$ 291,597	**$ -**	**$ -**	$ -
2020 [2]	$ 2,445,148	$ 536,740	$ 2,981,888	$ -	$ -	$ -
2021 [2]	$ -	$ -	$ -	$ -	$ -	$ -
2022 [2]				$ -	$ -	$ -
Total	$ 2,684,258	$ 589,227	$ 3,273,485	$ -	$ -	$ -

	2022			2023		
EM&V Unspent/Uncommitted Funds	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
Pre-2020	$ -	$ -	$ -	$ -	$ -	$ -
2020 [2]	$ 112,433	$ 24,680	$ 137,114	$ -	$ -	$ -
2021 [2]	$ -	$ -	$ -	$ -	$ -	$ -
2022 [2]				$ -	$ -	$ -
Total	$ 112,433	$ 24,680	$ 137,114	$ -	$ -	$ -

	2022			2023		
Total Unspent/Uncommitted Funds	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
Pre-2020	$ 239,110	$ 52,487	$ 291,597	$ -	$ -	$ -
2020 [2]	$ 2,557,582	$ 561,420	$ 3,119,002	$ -	$ -	$ -
2021 [2]	$ -	$ -	$ -	$ -	$ -	$ -
2022 [2]				$ -	$ -	$ -
Total	$ 2,796,691	$ 613,908	$ 3,410,599	$ -	$ -	$ -

Note on Table 3d
Any actual uncommitted/unspent funds for 2023 will be trued-up in the IOU's respective electric and gas PPP annual rates advice letter for 2023.
2 These funds are assigned to CEC AB 841

Table 3e - Total Requested 2022-2023 IOU Revenue Requirement - Demand Response & Energy Efficiency 1,2

	2022				2023			
	Demand Response	**Energy Efficiency**			**Demand Response**	**Energy Efficiency**		
	Electric Demand Response Funds	**Electric Energy Efficiency Funds**	**Natural Gas Public Purpose Funds**	**Total Energy Efficiency Funds**	**Electric Demand Response Funds**	**Electric Energy Efficiency Funds**	**Natural Gas Public Purpose Funds**	**Total Energy Efficiency Funds**
Program Funds - PA [4]	$ -	$ 17,800,129	$ 3,907,345	$ 21,707,474	$ -	$ 20,492,538	$ 5,123,135	##########
Program Funds - CEC [5]		$ -	$ -	$ -		$ -	$ -	$ -
Program Funds - REN [5]		$ -	$ -	$ -		$ -	$ -	$ -
Program Funds - CCA [5]		$ -	$ -	$ -		$ -	$ -	$ -
EM&V [3]		$ 858,201	$ 188,385	$ 1,046,586		$ 853,856	$ 213,464	$ 1,067,320
Budget Total	**$ -**	**$ 18,658,329**	**$ 4,095,731**	**$ 22,754,060**	**$ -**	**$ 21,346,394**	**$ 5,336,599**	##########

Notes:

1 Authorized budget excludes reductions from past unspent funds, carryover and is consistent with funding approved in D. 09-09-047, D. 12-11-015, D.14-10-046 and D.15-10-028, D.18-05-041 and D.21-01-004.

2 REN and CCA information provided by all RENS and CCAs and is consistent with their respective ABALs.

3 This represent total IOU+CCA+REN EM&V

4 Program Funds represents the total program budget, excluding EM&V. Only the electric IOU PAs will complete the Demand Response funding columns.

5 only the IOU completes this line and should be consistent table 7.

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
(report budgets to the $--do not round)

Table 4 – Budget, Spent, Unspent, Carryover Details

New/Existing Program #	Discontinued Program #	Program Name	Target Exempt	Program Type	Business Sector	Portfolio Segment	Pre-2020 Unspent/Uncommitted EE Funds [6]	2021 Authorized Budget	2021 Forecasted Unspent/ Uncommitted Funds as of 7/31/2021	2021 Budget Spent as of 07/31/2021
BAYREN02		Multi Family	No	Core PA	Residential	Equity	$ -	$ 4,200,206.00	$ -	$ 1,258,781
BAYREN02-A		BAMBE Electrification	No	Core PA	Residential	Equity	$ -	$ 2,316,044.00	$ -	$ -
BAYREN03		Codes and Standards Program	Yes	Core PA	Codes & Standards	Codes & Standards	$ -	$ 1,973,650.00	$ -	$ 914,210
BAYREN04		Water/Energy Nexus	No	Core PA	Residential	Market Support	$ -	$ 1,473,420.00	$ -	$ 878,963
BAYREN06		Commercial	No	Core PA	Commercial	Resource Acquisition	$ -	$ 3,692,226.00	$ -	$ 449,160
BAYREN07		Green Labeling	No	Core PA	Residential	Market Support	$ 125,000	$ 1,079,750.00	$ -	$ 783,602
BAYREN08		Single Family	No	Core PA	Residential	Equity	$ 166,597	$ 9,176,252.00	$ -	$ 4,346,353
		PA PROGRAM TOTAL					**$ 291,597**	**$ 23,911,548**	**$ -**	**$ 8,631,069**
		EM&V (PA & ED Portions) Total [5]								
		EM&V - PA								$ 93,502
		EM&V - ED								
		EM&V TOTAL								**$ 93,502**
		PA Program and EM&V Total					**$ 291,597**	**$ 23,911,548**	**$ -**	**$ 8,724,571**
		CEC AB 841 Program Budget--IOU PA only								
		Applicable Annual % of difference between funding limitation & 2020 EE ABAL budget 3								
		IOU 2020 and Beyond Uncommitted and Unspent Carryover Balance								
		CEC AB 841 Total								
		PA Spending Budget Request (PA Program and EM&V + CEC AB 841)					**$ 291,597**	**$ 23,911,548**	**$ -**	**$ 8,724,571**

		Financing Pilot Programs								
		Financing Pilot Programs Total					**$ -**	**$ -**	**$ -**	**$ -**

		ME&O & ESA								
		ME&O[1]								
		ESA2								

Notes: (PA to add as needed, e.g., relevant advice letter references, decision references and any other needed explanations.)
1. ME&O requested budget for 2021 per AL 3498-E/3835-G.
2. SDG&E Financing Administrative cost is per AL 3451-E-A/2818-G.
3. Per D.21-01-xxx, percentage allocation is 70% for 2022 and 60% for 2023. For SDG&E that base for calculation is $116-80.
4 Add footnote on Non-EE budgeted overheads.
[5] For all PAs, EM&V costs only includes IOU's Total EM&V budget (PA + ED). For the IOU EM&V budget it does not include REN or CCAs EM&V budget.
[6] PAs have the option of inputting by program or by total

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
(report budgets to the $--do not round)

Table 4 – Budget, Spent, Unspent, Carryover Details

			2022									
New/Existing Program #	Discontinued Program #	Program Name	Administrative	Marketing/ Outreach	Direct Implementation Non-Incentive	Incentive/ Rebate	2022 PA Spending Budget Request	2022 PA Pre-2020 Uncommitted and Unspent Carryover Balance	2022 PA Revenue Requirement Request	First Year Net KWH	First Year Net KW	First Year Net Therms (MM)
BAYREN02		Multi Family	$ 224,500	$ 126,272	$ 910,000	$ 1,500,000	$ 2,760,772		$ 2,760,772	544,087.79	83.06	0.04
BAYREN02-A		BAMBE Electrification	$ 336,750	$ 189,408	$ 1,365,000	$ 2,250,000	$ 4,141,158		$ 4,141,158	4,689,007.01	4.78	0.03
BAYREN03		Codes and Standards Program	$ 183,750	$ -	$ 1,658,100	$ -	$ 1,841,850		$ 1,841,850	-	-	-
BAYREN04		Water/Energy Nexus	$ 141,750	$ 470,300	$ 965,700	$ -	$ 1,577,750		$ 1,577,750	-	-	-
BAYREN06		Commercial	$ 263,500	$ 298,847	$ 1,260,000	$ 2,000,000	$ 3,822,347		$ 3,822,347	4,599,900.00	604.71	0.01
BAYREN07		Green Labeling	$ 77,750	$ 134,000	$ 590,000	$ 500,000	$ 1,301,750	$ 125,000	$ 1,176,750	-	-	-
BAYREN08		Single Family	$ 626,000	$ 1,511,191	$ 3,035,255	$ 4,500,000	$ 9,672,446	$ 166,597	$ 9,505,849	1,151,339.35	97.62	0.05
		PA PROGRAM TOTAL	**$ 1,854,000**	**$ 2,730,018**	**$ 9,784,055**	**$ 10,750,000**	**$ 25,118,073**	**$ 291,597**	**$ 24,826,476**	**10,984,334.16**	**790.17**	**0.13**
		EM&V (PA & ED Portions) Total [5]										
		EM&V - PA					$ 287,811		$ 287,811			
		EM&V - ED					$ 758,775	$ -	$ 758,775			
		EM&V TOTAL					**$ 1,046,586**	**$ -**	**$ 1,046,586**			
		PA Program and EM&V Total	**$ 1,854,000**	**$ 2,730,018**	**$ 9,784,055**	**$ 10,750,000**	**$ 26,164,659**	**$ 291,597**	**$ 25,873,062**	**10,984,334.16**	**790.17**	**0.13**
		CEC AB 841 Program Budget--IOU PA only										
		Applicable Annual % of difference between funding limitation & 2020 EE ABAL budget 3							$ -			
		IOU 2020 and Beyond Uncommitted and Unspent Carryover Balance							$ -			
		CEC AB 841 Total					**$ -**	**$ -**	**$ -**			
		PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	**$ 1,854,000**	**$ 2,730,018**	**$ 9,784,055**	**$ 10,750,000**	**$ 26,164,659**	**$ 291,597**	**$ 25,873,062**	**10,984,334.16**	**790.17**	**0.13**

		Financing Pilot Programs										
							$ -		$ -			
							$ -		$ -			
							$ -		$ -			
							$ -		$ -			
							$ -		$ -			
							$ -		$ -			
		Financing Pilot Programs Total	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**-**	**-**	**-**

		ME&O & ESA										
		ME&O[1]					$ -		$ -			
		ESA2					$ -		$ -			
							$ -		$ -			

Notes: (PA to add as needed, e.g., relevant advice letter references, decision references and any other neec
1. ME&O requested budget for 2021 per AL 3498-E/3835-G.
2. SDG&E Financing Administrative cost is per AL 3451-E-A/2818-G.
3. Per D.21-01-xxx, percentage allocation is 70% for 2022 and 60% for 2023. For SDG&E that base for calc
4 Add footnote on Non-EE budgeted overheads.
[5] For all PAs, EM&V costs only includes IOU's Total EM&V budget (PA + ED). For the IOU EM&V budget it dc
[6] PAs have the option of inputting by program or by total

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
(report budgets to the $--do not round)

Table 4 – Budget, Spent, Unspent, Carryover Details

New/Existing Program #	Discontinued Program #	Program Name	First Year Net Elec CO2 (ton)	First Year Net Gas CO2 (ton)	Lifecycle Net KWH	Lifecycle Net Therms (MM)	Lifecycle Net Elec CO2 (Ton)	Lifecycle Net Gas CO2 (Ton)	Administrative	Marketing/ Outreach	Direct Implementation Non-Incentive	Incentive/Rebate	2023 PA Spending Budget Request
BAYREN02		Multi Family	148.69	231.48	2,603,632.75	0.19	737.52	1,102.39	$ 336,750	$ 189,408	$ 1,365,000	$ 2,250,000	$ 4,141,158
BAYREN02-A		BAMBE Electrification	(241.55)	1,311.65	22,319,937.55	0.15	(1,265.49)	6,244.02	$ 224,500	$ 126,272	$ 910,000	$ 1,500,000	$ 2,760,772
BAYREN03		Codes and Standards Program	-	-	-	-	-	-	$ 183,750	$ -	$ 1,615,600	$ -	$ 1,799,350
BAYREN04		Water/Energy Nexus	-	-	-	-	-	-	$ 141,750	$ 336,000	$ 1,186,100	$ -	$ 1,663,850
BAYREN06		Commercial	1,191.30	80.03	73,598,400.01	0.22	23,436.26	1,280.42	$ 263,500	$ 307,847	$ 1,385,000	$ 2,000,000	$ 3,956,347
BAYREN07		Green Labeling	-	-	-	-	-	-	$ 81,750	$ 130,000	$ 610,000	$ 500,000	$ 1,321,750
BAYREN08		Single Family	(38.23)	526.76	11,825,976.15	0.87	(643.94)	7,864.84	$ 626,000	$ 1,511,191	$ 3,035,255	$ 4,800,000	$ 9,972,446
		PA PROGRAM TOTAL	**1,060.21**	**2,149.92**	**110,347,946.45**	**1.42**	**22,264.35**	**16,491.68**	**$ 1,858,000**	**$ 2,600,718**	**$ 10,106,955**	**$ 11,050,000**	**$ 25,615,673**
		EM&V (PA & ED Portions) Total [5]											
		EM&V - PA											$ 293,513
		EM&V - ED											$ 773,807
		EM&V TOTAL											**$ 1,067,320**
		PA Program and EM&V Total	**1,060.21**	**2,149.92**	**110,347,946.45**	**1.42**	**22,264.35**	**16,491.68**	**$ 1,858,000**	**$ 2,600,718**	**$ 10,106,955**	**$ 11,050,000**	**$ 26,682,993**
		CEC AB 841 Program Budget--IOU PA only											
		Applicable Annual % of difference between funding limitation & 2020 EE ABAL budget 3											
		IOU 2020 and Beyond Uncommitted and Unspent Carryover Balance											$ -
		CEC AB 841 Total											**$ -**
		PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	**1,060.21**	**2,149.92**	**110,347,946.45**	**1.42**	**22,264.35**	**16,491.68**	**$ 1,858,000**	**$ 2,600,718**	**$ 10,106,955**	**$ 11,050,000**	**$ 26,682,993**

		Financing Pilot Programs											
													$ -
													$ -
													$ -
													$ -
													$ -
													$ -
		Financing Pilot Programs Total	-	-	-	-	-	-	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**

		ME&O & ESA											
		ME&O[1]											$ -
		ESA2											$ -
													$ -

Notes: (PA to add as needed, e.g., relevant advice letter references, decision references and any other nee
1. ME&O requested budget for 2021 per AL 3498-E/3835-G.
2. SDG&E Financing Administrative cost is per AL 3451-E-A/2818-G.
3. Per D.21-01-xxx, percentage allocation is 70% for 2022 and 60% for 2023. For SDG&E that base for calc
4 Add footnote on Non-EE budgeted overheads.
[5] For all PAs, EM&V costs only includes IOU's Total EM&V budget (PA + ED). For the IOU EM&V budget it d
[6] PAs have the option of inputting by program or by total

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
(report budgets to the $--do not round)

Table 4 – Budget, Spent, Unspent, Carryover Details

			2023										
New/Existing Program #	Discontinued Program #	Program Name	2023 PA Pre-2020 Uncommitted and Unspent Carryover Balance	2023 PA Revenue Requirement Request	First Year Net KWH	First Year Net KW	First Year Net Therms (MM)	First Year Net Elec CO2 (ton)	First Year Net Gas CO2 (ton)	Lifecycle Net KWH	Lifecycle Net Therms (MM)	Lifecycle Net Elec CO2 (Ton)	Lifecycle Net Gas CO2 (Ton)
BAYREN02		Multi Family	$ -	$ 4,141,158	808,877.32	123.49	0.06	229.58	344.10	3,870,732.07	0.28	1,118.14	1,638.72
BAYREN02-A		BAMBE Electrification	$ -	$ 2,760,772	3,125,814.59	3.19	0.02	(168.70)	874.42	14,876,991.58	0.10	(878.14)	4,162.09
BAYREN03		Codes and Standards Program	$ -	$ 1,799,350	-	-	-	-	-	-	-	-	-
BAYREN04		Water/Energy Nexus	$ -	$ 1,663,850	-	-	-	-	-	-	-	-	-
BAYREN06		Commercial	$ -	$ 3,956,347	6,985,438.07	920.34	0.02	1,888.31	116.32	111,767,009.04	0.32	36,388.97	1,861.06
BAYREN07		Green Labeling	$ -	$ 1,321,750	-	-	-	-	-	-	-	-	-
BAYREN08		Single Family	$ -	$ 9,972,446	1,033,633.96	100.29	0.05	(90.06)	553.06	11,540,723.27	0.91	(949.02)	8,257.22
		PA PROGRAM TOTAL	**$ -**	**$ 25,615,673**	**11,953,763.94**	**1,147.31**	**0.15**	**1,859.13**	**1,887.90**	**142,055,455.96**	**1.61**	**35,679.95**	**15,919.09**
		EM&V (PA & ED Portions) Total [5]											
		EM&V - PA		$ 293,513									
		EM&V - ED		$ 773,807									
		EM&V TOTAL	**$ -**	**$ 1,067,320**									
		PA Program and EM&V Total	**$ -**	**$ 26,682,993**	**11,953,763.94**	**1,147.31**	**0.15**	**1,859.13**	**1,887.90**	**142,055,455.96**	**1.61**	**35,679.95**	**15,919.09**
		CEC AB 841 Program Budget--IOU PA only											
		Applicable Annual % of difference between funding limitation & 2020 EE ABAL budget 3	$ -	$ -									
		IOU 2020 and Beyond Uncommitted and Unspent Carryover Balance	$ -	$ -									
		CEC AB 841 Total	**$ -**	**$ -**									
		PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	**$ -**	**$ 26,682,993**	**11,953,763.94**	**1,147.31**	**0.15**	**1,859.13**	**1,887.90**	**142,055,455.96**	**1.61**	**35,679.95**	**15,919.09**

		Financing Pilot Programs											
				$ -									
				$ -									
				$ -									
				$ -									
				$ -									
				$ -									
		Financing Pilot Programs Total	**$ -**	**$ -**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**

		ME&O & ESA											
		ME&O[1]		$ -									
		ESA2		$ -									
				$ -									

Notes: (PA to add as needed, e.g., relevant advice letter references, decision references and any other nee
1. ME&O requested budget for 2021 per AL 3498-E/3835-G.
2. SDG&E Financing Administrative cost is per AL 3451-E-A/2818-G.
3. Per D.21-01-xxx, percentage allocation is 70% for 2022 and 60% for 2023. For SDG&E that base for calc
4 Add footnote on Non-EE budgeted overheads.
[5] For all PAs, EM&V costs only includes IOU's Total EM&V budget (PA + ED). For the IOU EM&V budget it d
[6] PAs have the option of inputting by program or by total

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
Table 4.1– 2022- 2023 Program Changes

(report budgets to the $--do not round; add rows as needed)

Programs to be closed with the disposition of 2022-2023 BBAL **Programs with enhanced budgets (>40% budget increase)**

PA Justification	Third Party Implementer or Core	Statewide or Local	Programs to be Closed with the Disposition of 2022-2023 ABAL	% change	2020 Claimed TRC	2021 (Q2) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2021 Budget	2022 Budget	2023 Budget	Year Program Started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2022-2023 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2022-2023 ABAL planning and timing for new 3P contracts' ramp up
n/a														

Programs to be closed upon completion of commitments

PA Justification	Third Party Implementer or Core	Statewide or Local	Programs to be Closed with the Disposition of 2022-2023 ABAL	% change	2020 Claimed TRC	2021 (Q2) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2021 Budget	2022 Budget	2023 Budget	Year Program Started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2022-2023 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2022-2023 ABAL planning and timing for new 3P contracts' ramp up
n/a														

Programs with reduced budgets (>40% budget decrease), to continue in 2022 or 2023

PA justification	Third party implementer or Core	Statewide	Programs with reduced budgets (>40% budget decrease)	% change	2020 Claimed TRC	2021 (Q2) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2021 Budget	2022 Budget	2023 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2022-2023 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2022-2023 ABAL planning and timing for new 3P contracts ramp up , or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004.
n/a														

Programs with enhanced budgets (>40% budget increase)

PA justification	Third party implementer or Core	Statewide	Programs with enhanced budgets (>40% budget increase)	% change	2020 Claimed TRC	2021 (Q2) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2021 Budget	2022 Budget	2023 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2022-2023 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2022-2023 ABAL planning and timing for new 3P contracts ramp up , or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004.
n/a														

Programs that are new in 2022 or 2023

PA justification	Third party implementer or Core	Statewide	Programs that are new in 2022 or 2023				2022 Filed TRC	2023 Filed TRC	2021 Budget	2022 Budget	2023 Budget	MM/YY program to start	MM/YY Program is due to sunset; and flag as "NEW 3P" program if program is result of 3P solicitation process per D1801004	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2022-2023 ABAL planning and timing for new 3P contracts ramp up , or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004
n/a														

Pa Name:	Bay Area Regional Energy Network (BayREN)
Budget Year:	2022-2023

Table 5 - Committed Energy Efficiency Program Funding - Funds Not Yet Spent as of 7/31/2021

Accrued funds not yet spent Category	Electric Procurement Funds	Natural Gas Public Purpose Funds	Total
2017 to date EM&V Funds	$0	$0	$0
2017 to date Program Funds - Utility	$0	$0	$0
2017 to date Program Funds - REN	$0	$0	$0
2017 to date Program Funds - CCA	$0	$0	$0
2018 to date EM&V Funds	$0	$0	$0
2018 to date Program Funds - Utility	$0	$0	$0
2018 to date Program Funds - REN	$318,529	$60,672	$379,201
2018 to date Program Funds - CCA	$0	$0	$0
2019 to date EM&V Funds	$0	$0	$0
2019 to date Program Funds - Utility	$0	$0	$0
2019 to date Program Funds - REN	$0	$0	$0
2019 to date Program Funds - CCA	$0	$0	$0
2020 to date EM&V Funds	$0	$0	$0
2020 to date Program Funds - Utility	$0	$0	$0
2020 to date Program Funds - REN	$549,229	$235,384	$784,613
2020 to date Program Funds - CCA	$0	$0	$0
2021 to date EM&V Funds	$0	$0	$0
2021 to date Program Funds - Utility	$0	$0	$0
2021 to date Program Funds - REN	$0	$0	$0
2021 to date Program Funds - CCA	$0	$0	$0

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year 2022-2023

Table 6 - Statewide Programs

(Col D)*[IOU 'Electric Proportional Share' from INPUT TABLE) + [(1-Col D)*[IOU 'Gas Proportional Share' from INPUT TABLE]]

								Col D	Col E	Col F	Col G	Col H																							
Statewide Program*	**Lead IOU**	**2020 Program Contract Budget (Total for all IOUs)****	**2021 Program Contract Budget (Total for all IOUs)****	**2022 Program Contract Budget (Total for all IOUs)****	**2023 Program Contract Budget (Total for all IOUs)****	**Expected or Actual Contract Execution Launch Date (MM/YYYY)*****	**Annual Program Contract Budget After Launch****	**Percent Electric**	**Combined (Electric & Gas) Proportional Contribution to Contract Cost per Load-Share** (Either as reflected in co-funding agreement, or expected in co-funding agreement. Funding share may be within +/-20% of Target per formula in row 1 above)				**2020 Program Contract Expenditures by IOU****				**2020 IOU Administrative Expenditures^**				**2021 Total Program Contract Expenditures, as Reported by Lead IOU** (YTD as of July 31, 2021)**	**2021 IOU Administrative Expenditures (YTD as of July 31, 2021)^**				**2022 IOU Administrative Budgets^**				**2023 IOU Administrative Budgets^**			
									PG&E	**SDG&E**	**SCE**	**SCG**	**PG&E**	**SDG&E**	**SCE**	**SCG**	**PG&E**	**SDG&E**	**SCE**	**SCG**	**2021 Total Contract Expenditures**	**PG&E**	**SDG&E**	**SCE**	**SCG**	**PG&E**	**SDG&E**	**SCE**	**SCG**	**PG&E**	**SDG&E**	**SCE**	**SCG**
Workforce education, and training: Career and workforce readiness	PG&E																																	
Res New Construction																																		
NonRes New Construction																																		
Codes and Standards Advocacy																																		
Institutional Partnerships, DGS & Dept of Corrections																																		
WE&T K-12 Connections																																		
Water/wastewater pumping	SCE																																	
Lighting (Upstream)																																		
ETP, electric																																		
Institutional Partnerships, UC/CSU/CCC																																		
ETP, gas	SCG																																	
Food Service POS																																		
Midstream Comm Water Heating																																		
Res HVAC QI/QM	SDG&E																																	
Plug Load and Appliance																																		
Upstream HVAC (Comm + Res)																																		
Total		$ -	$ -	$ -	$ -		$ -						$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -

*Modify rows as needed to reflect consolidation or division of a program category per solicitation approach or contracts. Ultimately there should be one line per executed 3P contract.
The contract budget or signed contract amount **for a given year accounts for the anticipated launch date of the program. **Program contract budgets reflect third party implementation contract values and expenditures.**
^ Administrative budgets for statewide programs are IOU specific and are filed under separate program IDs. They include all non-contract program expenditures which cover coordination, support and management
***Launch date assumes that the signed contracts filed via AL are approved by ED in 90-days, where applicable.

BP Decision (D.18-05-041): OP 23. The 25 percent requirement for statewide funding articulated in D.16-08-019 shall be calculated as a proportion of the utility program administrator's total portfolio budget, including evaluation, measurement, and verification funding, but excluding funding allocated to other program administrators for other (non-statewide) programs. The percentage requirement for statewide program funding for the Southern California Gas Company shall be reduced to 15 percent, but remain 25 percent for the other utility program administrators consistent with D.16-08-019.

INPUT TABLE: DO NOT MODIFY

IOU	**Percent PPP Electric**	**Percent PPP Gas**			**Electric Proportional Share**	**Gas Proportional Share**
PG&E	80%	20%			44.4%	50.4%
SDG&E	90%	10%			15.5%	7.8%
SCE	100%	0%			40.1%	0.0%
SoCalGas	0%	100%			0.0%	41.8%

ADVICE LETTER 3268-E-A/2701-G-A
(San Diego Gas & Electric Company - U902 M)
ADVICE LETTER 5346-G-A
(Southern California Gas Company - U904 G)
ADVICE LETTER 3861-E-A
(Southern California Edison Company - U338 E)
ADVICE LETTER 5373-E-A/4009-G-A
(Pacific Gas & Electric Company – U39 M)

Pa Na Bay Area Regional Energy Network (BayREN)
Budge 2022-2023

Table 7 - PA Program Year Budget Savings

Line	Sector	Program Year (PY) 2022 Budget	FORECAST ENERGY SAVINGS (Net) PA forecast kWh	PA forecast kW	PA forecast therms (MM)	PA Forecast Elec CO2	PA Forecast GasCO2	Program Year (PY) 2023 Budget	FORECAST ENERGY SAVINGS (Net) PA forecast kWh	PA forecast kW	PA forecast therms (MM)	PA Forecast Elec CO2	PA Forecast GasCO2
	Resource Acquisition Program Segment												
	Residential	$0	-	-	-	-	-	$0	-	-	-	-	-
	Commercial	$3,822,347	4,599,900	605	0.01	1,191	80	$3,956,347	6,985,438.07	920.34	0.02	1,888.31	116.32
	Industrial	$0	-	-	-	-	-	$0	-	-	-	-	-
	Agricultural	$0	-	-	-	-	-	$0	-	-	-	-	-
	Emerging Tech	$0	-	-	-	-	-	$0	-	-	-	-	-
	Public	$0	-	-	-	-	-	$0	-	-	-	-	-
1	WE&T	$0	-	-	-	-	-	$0	-	-	-	-	-
2	Finance	$0	-	-	-	-	-	$0	-	-	-	-	-
3	OBF Loan Pool	$0	-	-	-	-	-	$0	-	-	-	-	-
4	**PA Subtotal (does not include ESA budget and savings)**	**$3,822,347**	**4,599,900**	**605**	**0.01**	**1,191**	**80**	**$3,956,347**	**6,985,438**	**920**	**0.02**	**1,888**	**116**
	Resource Acquisition Forecasted Total System Benefit (TSB)	$6,286,277						$10,185,086					
	Resource Acquisition Forecasted Total Resource Cost (TRC)	$5,954,604						$7,446,128					
	Portfolio Forecasted Portfolio Administrator Cost (PAC)	$3,765,034						$3,887,155					
	Market Support Program Segment												
	Residential	$2,879,500	-	-	-	-	-	$2,985,600	-	-	-	-	-
	Commercial	$0	-	-	-	-	-	$0	-	-	-	-	-
	Industrial	$0	-	-	-	-	-	$0	-	-	-	-	-
	Agricultural	$0	-	-	-	-	-	$0	-	-	-	-	-
	Emerging Tech	$0	-	-	-	-	-	$0	-	-	-	-	-
	Public	$0	-	-	-	-	-	$0	-	-	-	-	-
1	WE&T	$0	-	-	-	-	-	$0	-	-	-	-	-
2	Finance	$0	-	-	-	-	-	$0	-	-	-	-	-
3	OBF Loan Pool	$0	-	-	-	-	-	$0	-	-	-	-	-
4	**PA Subtotal (does not include ESA budget and savings)**	**$2,879,500**	**-**	**-**	**-**	**-**	**-**	**$2,985,600**	**-**	**-**	**-**	**-**	**-**
	Resource Acquisition Forecasted Total System Benefit (TSB)	$0						$0					
	Portfolio Forecasted Total Resource Cost (TRC)	$2,879,500						$2,985,600					
	Portfolio Forecasted Portfolio Administrator Cost (PAC)	$2,879,500						$2,985,600					
	Equity Program Segment												
	Residential	$16,574,376	-	-	-	-	-	$16,874,376	-	-	-	-	-
	Commercial	$0	-	-	-	-	-	$0	-	-	-	-	-
	Industrial	$0	-	-	-	-	-	$0	-	-	-	-	-
	Agricultural	$0	-	-	-	-	-	$0	-	-	-	-	-
	Emerging Tech	$0	-	-	-	-	-	$0	-	-	-	-	-
	Public	$0	-	-	-	-	-	$0	-	-	-	-	-
1	WE&T	$0	-	-	-	-	-	$0	-	-	-	-	-
2	Finance	$0	-	-	-	-	-	$0	-	-	-	-	-
3	OBF Loan Pool	$0	-	-	-	-	-	$0	-	-	-	-	-
4	**PA Subtotal (does not include ESA budget and savings)**	**$16,574,376**	**-**	**-**	**-**	**-**	**-**	**$16,874,376**	**-**	**-**	**-**	**-**	**-**
	Resource Acquisition Forecasted Total System Benefit (TSB)	$2,223,719						$2,246,051					
	Portfolio Forecasted Total Resource Cost (TRC)	$14,597,620						$14,979,077					
	Portfolio Forecasted Portfolio Administrator Cost (PAC)	$16,931,172						$17,176,929					
	Portfolio												
	Residential	$19,453,876	6,384,434	185	0.12	(131)	2,070	$19,859,976	4,968,325.87	226.97	0.13	(29.18)	1,771.58
	Commercial	$3,822,347	4,599,900	605	0.01	1,191	80	$3,956,347	6,985,438.07	920.34	0.02	1,888.31	116.32
	Industrial	$0	-	-	-	-	-	$0	-	-	-	-	-
	Agricultural	$0	-	-	-	-	-	$0	-	-	-	-	-
	Emerging Tech	$0	-	-	-	-	-	$0	-	-	-	-	-
	Public	$0	-	-	-	-	-	$0	-	-	-	-	-
1	WE&T	$0	-	-	-	-	-	$0	-	-	-	-	-
2	Finance	$0	-	-	-	-	-	$0	-	-	-	-	-
3	OBF Loan Pool	$0	-	-	-	-	-	$0	-	-	-	-	-
4	**PA Subtotal (does not include ESA budget and savings)**	**$23,276,223**	**10,984,334**	**790**	**0.13**	**1,060**	**2,150**	**$23,816,323**	**11,953,764**	**1,147**	**0.15**	**1,859**	**1,888**
5	**CPUC Savings Goal (w/o C&S)**		10,984,334	790	0.13	1,060	2,150		11,953,764	1,147	0.15	1,859	1,888
6	**Forecast savings as % of CPUC Savings Goal (w/o C&S)**	NA	100.0%	100.0%	100.0%	100.0%	100.0%	NA	100.0%	100.0%	100.0%	100.0%	100.0%
7	**Total EM&V** [7]	$1,046,586						$1,067,320					
7a	PA EM&V	$287,811						$293,513					
7b	ED EM&V	$758,775						$773,807					
	Portfolio Forecasted Total System Benefit (TSB)	$8,509,996						$12,431,137					
	Portfolio Forecasted Total Resource Cost -TRC (w/o C&S and w/ EM&V)	$24,478,310						$26,478,124					
	Portfolio Forecasted Portfolio Administrator Cost (PAC)	$26,464,142						$26,916,354					
	Portfolio Forecasted Ratepayer Impact Measure (RIM)	$26,464,142						$26,916,354					
8	**Codes and Standards**	$1,841,850						$1,799,350					
9	**PA Spending Budget Request**[1]	$26,164,659						$26,682,993					
10	**(LESS) PA Uncommitted and Unspent Carryover Balance**[2]	$3,410,599						$0					
11	**CEC AB 841 Program Funding** [3]												
12	Applicable percentage (70%) of difference between funding limitation and 2020 budget	$0						$0					
13	PA 2020 and Beyond Uncommitted and Unspent Carryover Balance [4]	$0						$0					
14	**CEC AB 841 Total Program Funding**	$0						$0					
15	**PA Revenue Requirement Request (Cost Recovery)** [5]	$22,754,060						$26,682,993					
	% of Equity and Market Support Program Budgets to PA Spending Budget Request (not to Exceed 30%)	74%						74%					
16	**PA Authorized Budget Cap (D.18-05-041)**	23,720,000						24,605,000					
	For CCA & RENS in IOU Service Territory Only--(IOU PA Only to complete)												
21	**REN Budget Recovery Request**	$0						$0					
21a	BayREN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	-						-					
21b	SoCal REN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	-						-					
21c	3CREN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	-						-					
21d	RCEA PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	-						-					
22	**CCA Budget Recovery Request**	$0						$0					
22a	MCE PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	-						-					
22b	Lancaster PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	-						-					
	Redwood Coast Energy Authority (excl. REN Uncommitted/Unspent Carryover)	-						-					
	San Jose Clean Energy (excl. REN Uncommitted/Unspent Carryover)	-						-					
17	**Total PA (IOU+CCAs+RENs) Recovery Budget**[6]	$22,754,060						$26,682,993					

[1] This is the IOU's requested EE Portfolio budget. This is the budget by which the Statewide Program compliance budget requirement of 25% will be measured.

[2] ~~The balance of unspent uncommitted must reflect the total unspent uncommitted from pre-2020 EE authorized budgets Jan 1 2018 through Dec 31 of current year (PY-1). Because each ABAL is filed in Q3, this unspent uncommitted amount will be an estimate for the year in which the ABAL is filed.~~ Because AB 841 does not apply to BayREN, this total includes the pre-2020 and 2020 Uncommitted and Unspent Carryover Balance.

[3] See D.21-01-004 Tables 2 (2022) and 3 (2022)

[4] Because each ABAL is filed in Q3, this unspent uncommitted amount will be an estimate for the year in which the ABAL is filed.

[5] The amount of funds to be collected (cost recovery) for the PA EE Program Year = Line 9 - Line 10 + Line 12

[6] Total amount to be requested in ~~IOU's PPP advice letter for their programs,~~ REN's ~~and CCAs in their~~ service territory, Line 15+ Line 21 + Line 22

[7] For IOUs, EM&V costs only includes IOU's Total EM&V budget (PA + ED) and does not include REN or CCAs EM&V budget. For RENs & CCAs, include EM&V-PA Budget and EM&V-ED ~~= $0~~ .

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
Table 8 - Caps & Targets

		2022 Energy Efficiency Cap And Target Expenditure Projections						2023 Energy Efficiency Cap And Target Expenditure Projections					
		Expenditures			Cap & Target Performance			Expenditures			Cap & Target Performance		
Line	Budget Category	Non-Third Party Qualifying Costs (including PA costs and old definition 3P/GP contracts that don't meet the new definition)	Third Party Qualifying Costs [2] (Local SW, CEC & AB 841)	Total Portfolio	Percent of Budget [8]	Cap %	Target %	Non-Third Party Qualifying Costs (including PA costs and old definition 3P/GP contracts that don't meet the new definition)	Third Party Qualifying Costs [2] (including SW)	Total Portfolio	Percent of Budget [8]	Cap %	Target %
1	**Administrative Costs**												
2	PA [1]	$ 1,670,250		$ 1,670,250	**6.4%**	**10.0%**		$ 1,674,250		$ 1,674,250	**6.4%**	**10.0%**	
3	Non-PA Third Party & Partnership [2]	$ -	$ -	$ -	**0.0%**		**10.0%**	$ -	$ -	$ -	**0.0%**		**10.0%**
4	PA & Non-PA Target Exempt Programs [3]	$ 183,750	$ -	$ 183,750				$ 183,750	$ -	$ 183,750			
5	**Marketing and Outreach Costs** [4]												
6	Marketing & Outreach	$ 2,730,018	$ -	$ 2,730,018	**10.4%**		**6.0%**	$ 2,600,718	$ -	$ 2,600,718	**9.9%**		**6.0%**
7	Statewide Marketing & Outreach [5]	$ -		$ -				$ -		$ -			
8	**Direct Implementation Costs**												
9	Direct Implementation (Incentives and Rebates)	$ 10,750,000	$ -	$ 10,750,000				$ -	$ 11,050,000	$ 11,050,000			
10	Direct Implementation (Non Incentives and Non Rebates)	$ 8,125,955	$ -	$ 8,125,955	**31.1%**		**20.0%**	$ 8,491,355	$ -	$ 8,491,355	**32.5%**		**20.0%**
11	Direct Implementation Target Exempt Programs (Non Incentives and Non Rebates)[3]	**$ 1,658,100**	$ -	$ 1,658,100				**$ 1,615,600**	$ -	$ 1,615,600			
12	**EM&V Costs (PA and Energy Division)** [6,7]	**$ 1,046,586**		$ 1,046,586	**4.2%**	**4.0%**		**$ 1,067,320**		$ 1,067,320	**4.2%**	**4.0%**	
12a	EM&V - PA	$ 287,811		$ 287,811				$ 293,513		$ 293,513			
12b	EM&V - ED	$ 758,775		$ 758,775				$ 773,807		$ 773,807			
13	**Total Portfolio Budget (includes PA Program and EM&V Budget + SW ME&O)** [8]	**$ 26,164,659**	**$ -**	**$ 26,164,659**				**$ 15,632,993**	**$ 11,050,000**	**$ 26,682,993**			
14	**CEC AB 841 (per CPUC Code Section 1613 counts as a Third Party Program as defined in D.18-08-019, OP 10)**		**$ -**	**$ -**					**$ -**	**$ -**			
15	**PA Spending Budget Request (PA Program and EM&V + CEC AB 841)** [9]			**$ 26,164,659**						**$ 26,682,993**			
16	**Total Third-Party Implementer Contracts + CEC AB 841 (as defined per D.16-08-019, OP 10 and D.21-01-xxx OP)** [10, 11]		**$ -**		**0.0%**	**60.0%**			**$ 11,050,000**		**41.4%**	**60.0%**	

Notes:
1. 10% cap requirement based on D. 09-09-047 is set for IOU only.
2. New Third party program definition per D.16-08-019, OP 10. For Row 3 of this table, the "Third Party & Partnership" administrative costs under the "Non-Third Party Qualifying Costs" column are costs for programs that met the old Third Party definition prior to the transition to the new third party definition.
3. Target Exempt Programs are Non-Resource Programs which include: Emerging Technologies, Workforce Education & Training, Strategic Energy Resources (SER) program, 3P Placeholder for Public LGPs, and Codes & Standards programs (excluding Building Codes Advocacy, Appliance Standards Advocacy and National Standards Advocacy).
4. Statewide Marketing & Outreach (SW ME&O) is excluded from the Marketing and Outreach cost target calculation per D.13-12-038, at p. 82.
5. Statewide ME&O budgets for October 2019 through 2021 were requested in Advice Letter4098-G/5544-E and supplements, and are pending approval. The amount in Line 7 represents the portion allocated to EE.
6. For IOUs, EM&V costs only includes IOU's Total EM&V budget (PA + ED) and does not include REN or CCAs EM&V budget. For RENs & CCAs, include EM&V-PA Budget and EM&V-ED = $0 .
7. The EM&V percentage is based on PA's total portfolio budgetof $X, which excludes SWME&O, RENs, CCAs and CEC AB 841. This is the Total in line 13, minus SWME&O in line 7.
8. As directed in the Energy Efficiency Policy Manual Version 5 July 2013, page 92, this total includes SW ME&O and excludes REN and CCA budgets and is the denominator used to calculate the IOU PA Admin, Marketing, and Direct Implementation Non-Incentives percentages.
9. IOU PA's 2021 Proposed Budget of $X excludes SWME&O budget of $Y and includes CEC AB 841 budgets of $Z.
10. IOU PA's percentage for Third-Party Implementer Contracts uses $X as its denominator, which is IOU PA Subtotal including EM&V, but excluding SWME&O, REN, and CCA. This is the Total in line 15 minus, minus SWME&O in line 7.
11. IOU's Third-Party Implementer Contracts (as defined per D.16-08-019, OP 10) includes third-party contract and incentive budgets and statewide qualifying contract and incentive budgets.

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
PORTFOLIO SUMMARY

	2020 EE Portfolio Expenditures				2022 EE Portfolio Budget				2023 EE Portfolio Budget				2020 EE Portfolio Savings			2022 EE Portfolio Forecasted Savings			2023 EE Portfolio Forecasted Savings		
Sector	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	KWH	KW	MMTHERMS	KWH	KW	MTHERMS	KWH	KW	MTHERMS
Residential	$ 788,460.47	$ 8,334,939.26	$ 6,496,163.05	**$ 15,619,562.78**	$ 1,239,811.00	$ 9,464,065.00	$ 8,750,000.00	**$ 19,453,876.00**	$ 1,239,811.00	$ 9,570,165.00	$ 9,050,000.00	**$ 19,859,976.00**	2,330,692	308	0.15	6,384,434	185	0	4,968,326	227	0
Commercial	$ 68,254.07	$ 1,161,775.98	$ -	**$ 1,230,030.05**	$ 155,000.00	$ 1,667,347.00	$ 2,000,000.00	**$ 3,822,347.00**	$ 155,000.00	$ 1,801,347.00	$ 2,000,000.00	**$ 3,956,347.00**	-	-	-	4,599,900	605	0	6,985,438	920	0
Industrial	$ -	$ -	$ -	**$ -**	$ -	$ -	$ -	**$ -**	$ -	$ -	$ -	**$ -**	-	-	-	-	-	-	-	-	-
Agricultural	$ -	$ -	$ -	**$ -**	$ -	$ -	$ -	**$ -**	$ -	$ -	$ -	**$ -**	-	-	-	-	-	-	-	-	-
Public	$ -	$ -	$ -	**$ -**	$ -	$ -	$ -	**$ -**	$ -	$ -	$ -	**$ -**	-	-	-	-	-	-	-	-	-
Cross Cutting*	$ 311,322.10	$ 1,158,517.87	$ -	**$ 1,469,839.97**	$ 505,000.00	$ 1,336,850.00	$ -	**$ 1,841,850.00**	$ 500,500.00	$ 1,298,850.00	$ -	**$ 1,799,350.00**	-	-	-	-	-	-	-	-	-
Total Sector Budget	$ 1,168,036.64	$ 10,655,233.11	$ 6,496,163.05	**$ 18,319,432.80**	$ 1,899,811.00	$ 12,468,262.00	$ 10,750,000.00	**$ 25,118,073.00**	$ 1,895,311.00	$ 12,670,362.00	$ 11,050,000.00	**$ 25,615,673.00**	2,330,692	308	0.15	10,984,334	790	0	11,953,764	1,147	0
EM&V-PA	$ -	$ 140,291.25	$ -	**$ 140,291.25**	$ -	$ 287,811.00	$ -	**$ 287,811.00**	$ -	$ 293,513.00	$ -	**$ 293,513.00**									
EM&V-ED	$ -	$ -	$ -	**$ -**	$ -	$ 773,807.00	$ -	**$ 758,775.00**	$ -	$ 773,807.00	$ -	**$ 773,807.00**									
OBF - Loan Pool**	$ -	$ -	$ -	**$ -**			$ -	**$ -**			$ -	**$ -**									
CEC AB841	$ -	$ -	$ -	**$ -**	$ -	$ -	$ -	**$ -**	$ -	$ -	$ -	**$ -**									
PA Spending Budget Request (PA Program and EM	**$ 1,168,036.64**	**$ 10,795,524.36**	**$ 6,496,163.05**	**$ 18,459,724.05**	**$ 1,899,811.00**	**$ 13,529,880.00**	**$ 10,750,000.00**	**$ 26,164,659.00**	**$ 1,895,311.00**	**$ 13,737,682.00**	**$ 11,050,000.00**	**$ 26,682,993.00**	**2,330,692.00**	**308**	**0.15**	**10,984,334**	**790**	**0**	**11,953,764**	**1,147**	**0**

* Cross Cutting Sector includes Codes & Standards, Emerging Technologies, Workforce Education & Training, Finance.
** For SDG&E and SCG the loan pool is not part of the authorized EE portfolio budget and is collected and tracked through a separate balancing account.

A. → Attachment-A,·Question·C.8¶

"Present·a·single·table·summarizing·energy·savings·targets,·and·expenditures·by·sector·(for·the·six·specified·sectors).·This·table·should·enable·/·facilitate·assessment·of·relative·contributions·of·the·sectors·to·savings·targets,·and·relative·cost-effectiveness."¶

¶

- → TURN·and·ORA·invite·the·PAs·to·propose·a·common·table·format·for·this·information.··We·don't·have·anything·specific·in·mind.¶
- → Additionally,·include·a·brief·description·of·the·method·used·by·the·PA·to·estimate·the·costs·presented·in·the·C.8·Table.··¶

¶

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
PORTFOLIO STAFFING

Functional Group	2020 EE Portfolio FTE (2)	2022 EE Portfolio FTE (2)	2023 EE Portfolio FTE (2)
Policy, Strategy, and Regulatory Reporting Compliance	1.6	1.8	1.8
Program Management	2.1	2.6	2.6
Engineering Services			
Customer Application/Rebate/Incentive Processing			
Customer Project Inspections			
Portfolio Analytics (1)			
EM&V			
ME&O (Local)			
Account Management / Sales			
IT			
Call Center			
Total	3.7	4.4	4.4

Notes:
(1) SDG&E does not have a Portfolio Analytics group. Each group performs their own analytics.
(2) FTE is equal to productive labor of 1788 hour per year.

A. → Narrative description of in-house departments/organizations supporting the PA's EE portfolio

- Functions conducted by each department/organization
- Management structure and org chart
- Staffing needs by department/organization, including current and forecast for 2018, as well as a description of what changes are expected in the near term (2019-2020) or why it's impossible to predict beyond 2018, if that's the PA's position.
- Non-program functions currently performed by contractors (e.g. advisory consultants), as well as a description of what changes are expected in the near term (2019-2020) or why it's impossible to predict beyond 2018, if that's the PA's position.
- Anticipated drivers of in-house cost changes by department/organization
- Explanation of method for forecasting costs

B. → Table showing PA EE headcount by department/organization

- TURN and ORA like this example, taken from testimony PG&E's 2017 GRC addressing its Energy Procurement department. We would be looking for 2016 or 2017 "recorded" positions, depending on what's most appropriate for the PA, or both, if that provides the most clarity. For forecast years, we'd want at least 2018.

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
RESIDENTIAL BUDGET DETAIL

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Residential	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	$ 325,880.070	$ 504,566.343	$ 489,182.823
		Program Management	$ 283,280.560	$ 467,363.710	$ 472,930.210
		Engineering services	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ -	$ -	$ -
		Customer Project Inspections	$ -	$ -	$ -
		Portfolio Analytics	$ -	$ -	$ -
		ME&O (Local)	$ 179,299.840	$ 267,880.947	$ 277,697.967
		Account Management / Sales	$ -	$ -	$ -
		IT	$ -	$ -	$ -
		Call Center	$ -	$ -	$ -
	Labor Total		**$ 788,460.470**	**$ 1,239,811.000**	**$ 1,239,811.000**
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	$ -	$ -	$ -
		Local/Government Partnerships Contracts (3)	$ -	$ -	$ -
		Other Contracts	$ -	$ -	$ -
		Program Implementation	$ 6,353,717.160	$ 7,132,025.964	$ 6,768,401.769
		Policy, Strategy, and Regulatory Reporting Compliance	$ 329,889.110	$ 332,394.554	$ 373,221.187
		Program Management	$ -	$ -	$ -
		Engineering services	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ 254,289.640	$ 279,576.822	$ 295,272.103
		Customer Project Inspections	$ -	$ -	$ -
		Portfolio Analytics	$ 66,210.140	$ 97,914.378	$ 139,975.270
		ME&O (Local)	$ 1,330,833.210	$ 1,622,153.283	$ 1,993,294.671
		Account Management / Sales	$ -	$ -	$ -
		IT (4)	$ -	$ -	$ -
		Call Center	$ -	$ -	$ -
		Facilities	$ -	$ -	$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	$ 6,496,163.050	$ 8,750,000.000	$ 9,050,000.000
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	$ -	$ -	$ -
	Non-Labor Total		**$ 14,831,102.310**	**$ 18,214,065.000**	**$ 18,620,165.000**
Residential Total			**$ 15,619,562.780**	**$ 19,453,876.000**	**$ 19,859,976.000**
	Other (collected through GRC) (2)	Labor Overheads			
			$ -	$ -	$ -

Notes:
(1) Labor costs are already loaded with (state loaders covered by EE)
(2) These costs are collected through GRC D.16-06-054
(3) LGP contracts that directly support the sector is included/not included in this item
(4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".

C. → Table showing costs by functional area of management structure

- Expenses broken out into labor, non-labor O&M (with contract labor identified)
- Identify any capital costs

B. → Attachment-A, Question C.9

"Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a "meet and confer" session), display how much of each year's budget each PA anticipates spending "in-house" (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program."

- TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.
- Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
COMMERCIAL BUDGET DETAIL

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Commercial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	$ 57,230.790	$ 129,966.938	$ 129,966.938
		Program Management	$ 11,023.280	$ 25,033.062	$ 25,033.062
		Engineering services	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ -	$ -	$ -
		Customer Project Inspections	$ -	$ -	$ -
		Portfolio Analytics	$ -	$ -	$ -
		ME&O (Local)	$ -	$ -	$ -
		Account Management / Sales	$ -	$ -	$ -
		IT	$ -	$ -	$ -
		Call Center	$ -	$ -	$ -
	Labor Total		**$ 68,254.070**	**$ 155,000.000**	**$ 155,000.000**
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	$ -	$ -	$ -
		Local/Government Partnerships Contracts (3)	$ -	$ -	$ -
		Other Contracts	$ -	$ -	$ -
		Program Implementation	$ -	$ -	$ -
		Policy, Strategy, and Regulatory Reporting Compliance	$ 1,057,590.330	$ 1,517,822.794	$ 1,639,805.953
		Program Management	$ 48,523.000	$ 69,638.794	$ 75,235.469
		Engineering services	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ -	$ -	$ -
		Customer Project Inspections	$ -	$ -	$ -
		Portfolio Analytics	$ -	$ -	$ -
		ME&O (Local)	$ 55,662.650	$ 79,885.412	$ 86,305.578
		Account Management / Sales	$ -	$ -	$ -
		IT (4)	$ -	$ -	$ -
		Call Center	$ -	$ -	$ -
		Facilities	$ -	$ -	$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	$ -	$ 2,000,000.000	$ 2,000,000.000
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	$ -		
	Non-Labor Total		**$ 1,161,775.980**	**$ 3,667,347.000**	**$ 3,801,347.000**
Commercial Total (5)			**$ 1,230,030.050**	**$ 3,822,347.000**	**$ 3,956,347.000**
	Other (collected through GRC) (2)	Labor Overheads			
			$ -	$ -	$ -

Notes:
(1) Labor costs are already loaded with (state loaders covered by EE)
(2) These costs are collected through GRC D.16-06-054
(3) LGP contracts that directly support the sector is included/not included in this item
(4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".
(5) Under the previous program categories the following programs were classified as Cross Cutting: 3P-IDEEA, Local-IDSM-ME&O-Local Marketing (EE), SW-IDSM-IDSM. These are included in Table 16 Cross Cutting. These three programs are now classified as Commercial with the elimination of Cross Cutting programs.

C. → Table showing costs by functional area of management structure

- → Expenses broken out into labor, non-labor O&M (with contract labor identified)
- → Identify any capital costs

B. → Attachment-A, Question C.9

"Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a "meet and confer" session), display how much of each year's budget each PA anticipates spending "in-house" (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program.""

- → TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.
- → Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
INDUSTRIAL BUDGET DETAIL

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Industrial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance			
		Program Management			
		Engineering services			
		Customer Application/Rebate/Incentive Processing			
		Customer Project Inspections			
		Portfolio Analytics			
		ME&O (Local)			
		Account Management / Sales			
		IT			
		Call Center			
	Labor Total		$ -	$ -	$ -
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)			
		Local/Government Partnerships Contracts (3)			
		Other Contracts			
		Program Implementation			
		Policy, Strategy, and Regulatory Reporting Compliance			
		Program Management			
		Engineering services			
		Customer Application/Rebate/Incentive Processing			
		Customer Project Inspections			
		Portfolio Analytics			
		ME&O (Local)			
		Account Management / Sales			
		IT (4)			
		Call Center			
		Facilities			
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs			
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)			
	Non-Labor Total		$ -	$ -	$ -
Industrial Total (5)			$ -	$ -	$ -
	Other (collected through GRC) (2)	Labor Overheads			
			$ -	$ -	$ -

Notes:
(1) Labor costs are already loaded with (state loaders covered by EE)
(2) These costs are collected through GRC D.16-06-054
(3) LGP contracts that directly support the sector is included/not included in this item
(4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".

C. → Table showing costs by functional area of management structure

- Expenses broken out into labor, non-labor O&M (with contract labor identified)
- Identify any capital costs

B. → Attachment-A, Question C.9

"Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a "meet and confer" session), display how much of each year's budget each PA anticipates spending "in-house" (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program."

- TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.
- Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
AGRICULTURAL BUDGET DETAIL

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Agricultural	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance			
		Program Management			
		Engineering services			
		Customer Application/Rebate/Incentive Processing			
		Customer Project Inspections			
		Portfolio Analytics			
		ME&O (Local)			
		Account Management / Sales			
		IT			
		Call Center			
	Labor Total		$ -	$ -	$ -
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)			
		Local/Government Partnerships Contracts (3)			
		Other Contracts			
		Program Implementation			
		Policy, Strategy, and Regulatory Reporting Compliance			
		Program Management			
		Engineering services			
		Customer Application/Rebate/Incentive Processing			
		Customer Project Inspections			
		Portfolio Analytics			
		ME&O (Local)			
		Account Management / Sales			
		IT (4)			
		Call Center			
		Facilities			
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs			
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)			
	Non-Labor Total		$ -	$ -	$ -
Agricultural Total (5)			$ -	$ -	$ -
	Other (collected through GRC) (2)	Labor Overheads			
			$ -	$ -	$ -

Notes:
(1) Labor costs are already loaded with (state loaders covered by EE)
(2) These costs are collected through GRC D.16-06-054
(3) LGP contracts that directly support the sector is included/not included in this item
(4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".

C. → Table showing costs by functional area of management structure

- Expenses broken out into labor, non-labor O&M (with contract labor identified)
- Identify any capital costs

B. → Attachment-A, Question C.9

"Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a "meet and confer" session), display how much of each year's budget each PA anticipates spending "in-house" (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program."

- TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.
- Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
PUBLIC SECTOR BUDGET DETAIL

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Public Sector	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance			
		Program Management			
		Engineering services			
		Customer Application/Rebate/Incentive Processing			
		Customer Project Inspections			
		Portfolio Analytics			
		ME&O (Local)			
		Account Management / Sales			
		IT			
		Call Center			
	Labor Total		$ -	$ -	$ -
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)			
		Local/Government Partnerships Contracts (3)			
		Other Contracts			
		Program Implementation			
		Policy, Strategy, and Regulatory Reporting Compliance			
		Program Management			
		Engineering services			
		Customer Application/Rebate/Incentive Processing			
		Customer Project Inspections			
		Portfolio Analytics			
		ME&O (Local)			
		Account Management / Sales			
		IT (4)			
		Call Center			
		Facilities			
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs			
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)			
	Non-Labor Total		$ -	$ -	$ -
Public Sector Total (5)			$ -	$ -	$ -
	Other (collected through GRC) (2)	Labor Overheads			
			$ -	$ -	$ -

Notes:
(1) Labor costs are already loaded with (state loaders covered by EE)
(2) These costs are collected through GRC D.16-06-054
(3) LGP contracts that directly support the sector is included/not included in this item
(4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".

C. → Table showing costs by functional area of management structure

- Expenses broken out into labor, non-labor O&M (with contract labor identified)
- Identify any capital costs

B. → Attachment-A, Question C.9

"Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a "meet and confer" session), display how much of each year's budget each PA anticipates spending "in-house" (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program."

- TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.
- Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Year: 2022-2023
CROSS -CUTTING BUDGET DETAIL

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Cross-Cutting	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	$ 65,955.850	$ 213,634.250	$ 221,726.450
		Program Management	$ 245,366.250	$ 446,365.750	$ 463,273.550
		Engineering services	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ -	$ -	$ -
		Customer Project Inspections	$ -	$ -	$ -
		Portfolio Analytics	$ -	$ -	$ -
		ME&O (Local)	$ -	$ -	$ -
		Account Management / Sales	$ -	$ -	$ -
		IT	$ -	$ -	$ -
		Call Center	$ -	$ -	$ -
	Labor Total		**$ 311,322.100**	**$ 660,000.000**	**$ 685,000.000**
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	$ -	$ -	$ -
		Local/Government Partnerships Contracts (3)	$ -	$ -	$ -
		Other Contracts	$ -	$ -	$ -
		Program Implementation	$ 982,732.910	$ 960,168.080	$ 948,239.190
		Policy, Strategy, and Regulatory Reporting Compliance	$ 30,819.250	$ 50,642.120	$ 46,284.360
		Program Management	$ 144,965.710	$ 171,039.800	$ 119,826.450
		Engineering services	$ -	$ -	$ -
		Customer Application/Rebate/Incentive Processing	$ -	$ -	$ -
		Customer Project Inspections	$ -	$ -	$ -
		Portfolio Analytics	$ -	$ -	$ -
		ME&O (Local)	$ -	$ -	$ -
		Account Management / Sales	$ -	$ -	$ -
		IT (4)	$ -	$ -	$ -
		Call Center	$ -	$ -	$ -
		Facilities	$ -	$ -	$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	$ -	$ -	$ -
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	$ -	$ -	$ -
	Non-Labor Total		**$ 1,158,517.870**	**$ 1,181,850.000**	**$ 1,114,350.000**
Cross-Cutting Total (5)			**$ 1,469,839.970**	**$ 1,841,850.000**	**$ 1,799,350.000**
	Other (collected through GRC) (2)	Labor Overheads			
			$ -	$ -	$ -

Notes:
(1) Labor costs are already loaded with (state loaders covered by EE)
(2) These costs are collected through GRC D.16-06-054
(3) LGP contracts that directly support the sector is included/not included in this item
(4) IT Costs are included in " Policy, Strategy, and Regulatory Reporting Compliance".
(5) Under the previous program categories the following programs were classified as Cross Cutting: 3P-IDEEA, Local-IDSM-ME&O-Local Marketing (EE), SW-IDSM-IDSM. These are included in Table 16 Cross Cutting. These three programs are now classified as Commercial with the elimination of Cross Cutting programs.

C. → Table showing costs by functional area of management structure

- Expenses broken out into labor, non-labor O&M (with contract labor identified)
- Identify any capital costs

B. → Attachment A, Question C.9

"Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a "meet and confer" session), display how much of each year's budget each PA anticipates spending "in-house" (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program."

- TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.
- Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

Pa Name: Bay Area Regional Energy Network (BayREN)
Budget Ye 2022-2023
Table 17: Metrics Compliance Filing
2022-2023 Forecast is embedded in the Mid Term Forecast. Final results are provided in the Annual Report.

Index	PA	AltA Page	AltA Order	Method Code	Units of Measurement	Metric Type	Metric/ Indicator	Business Plan Att A Description	Metric	Sector	Baseline Year	Baseline Number	Baseline Num	Baseline Denom	2017 Achievements	2018 Achievements	2019 Achievements	2018 Target	2019 Target	2020 Target	Mid Term Annual Targets (2021-2023)	Long Term Annual Target (2024-2025)	2020 Achievements	2020 Numerator	2020 Denominator	Methodology	Key Definitions	Proxy Explanation
0	BayREN	A03	PL1	G	MT CO2eq	GHG	Metric	RSF2-G••Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis••	CO2-equivalent of net annual kWh savings	Portfolio Level (PL)– All Sectors	2016	1,201	N/A	N/A	1,171	265	1,385	385	617	531	536	686	1,467	N/A	N/A	DEARS Annual Claims Output converted from short tons to metric tons CO2e	None	
1	BayREN	A02	PL1	S1	First year annual kW gross	S1: Energy Savings	Metric	PL1-S1- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	First year annual kW gross	Portfolio Level (PL)– All Sectors	2016	1,538	N/A	N/A	1,589	1,133	474	1,518	1,909	1,519	2,098	3,087	473	N/A	N/A		None	
2	BayREN	A02	PL1	S1	First year annual kW net	S1: Energy Savings	Metric	PL1-S1- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	First year annual kW net	Portfolio Level (PL)– All Sectors	2016	1,384	N/A	N/A	1,311	850	333	1,172	1,292	1,027	1,410	2,077	308	N/A	N/A		None	
3	BayREN	A02	PL1	S1	First year annual kWh gross	S1: Energy Savings	Metric	PL1-S1- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	First year annual kWh gross	Portfolio Level (PL)– All Sectors	2016	2,916,844	N/A	N/A	2,720,630	2,688,101	2,764,664	3,138,071	5,949,834	5,428,985	6,656,996	9,240,223	3,203,013	N/A	N/A		None	
4	BayREN	A02	PL1	S1	First year annual kWh net	S1: Energy Savings	Metric	PL1-S1- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	First year annual kWh net	Portfolio Level (PL)– All Sectors	2016	2,625,159	N/A	N/A	2,370,542	2,016,076	2,005,923	2,687,839	4,099,204	3,778,127	4,567,351	6,310,020	2,330,692	N/A	N/A		None	
5	BayREN	A02	PL1	S1	First year annual Therm gross	S1: Energy Savings	Metric	PL1-S1- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	First year annual Therm gross	Portfolio Level (PL)– All Sectors	2016	373,542	N/A	N/A	277,123	323,558	377,398	375,416	311,963	364,590	390,944	652,712	234,938	N/A	N/A		None	
6	BayREN	A02	PL1	S1	First year annual Therm net	S1: Energy Savings	Metric	PL1-S1- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	First year annual Therm net	Portfolio Level (PL)– All Sectors	2016	336,188	N/A	N/A	228,707	242,668	246,025	304,917	231,931	269,352	288,004	483,400	153,753	N/A	N/A		None	
7	BayREN	A02	PL1	S1	Lifecycle ex-ante kW gross	S1: Energy Savings	Metric	PL1-S1- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	Lifecycle ex-ante kW gross	Portfolio Level (PL)– All Sectors	2016	16,359	N/A	N/A	24,321	25,548	4,356	26,371	28,114	23,747	32,268	47,333	6,847	N/A	N/A		None	
8	BayREN	A02	PL1	S1	Lifecycle ex-ante kW net	S1: Energy Savings	Metric	PL1-S1- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	Lifecycle ex-ante kW net	Portfolio Level (PL)– All Sectors	2016	13,905	N/A	N/A	18,788	19,161	3,051	18,926	18,060	15,347	20,480	30,393	4,103	N/A	N/A		None	
9	BayREN	A02	PL1	S1	Lifecycle ex-ante kWh gross	S1: Energy Savings	Metric	PL1-S1- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	Lifecycle ex-ante kWh gross	Portfolio Level (PL)– All Sectors	2016	40,075,545	N/A	N/A	2,720,630	46,810,413	31,691,335	47,755,792	88,387,639	79,712,027	97,625,815	135,479,450	35,788,283	N/A	N/A		None	
10	BayREN	A02	PL1	S1	Lifecycle ex-ante kWh net	S1: Energy Savings	Metric	PL1-S1- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	Lifecycle ex-ante kWh net	Portfolio Level (PL)– All Sectors	2016	36,067,991	N/A	N/A	28,824,445	35,107,810	23,296,125	40,532,634	60,479,996	55,086,246	66,413,025	43,679,472	26,698,016	N/A	N/A		None	
11	BayREN	A02	PL1	S1	Lifecycle ex-ante Therm gross	S1: Energy Savings	Metric	PL1-S1- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	Lifecycle ex-ante Therm gross	Portfolio Level (PL)– All Sectors	2016	5,978,198	N/A	N/A	4,105,390	5,614,209	5,200,570	6,123,445	5,083,392	5,909,722	6,545,342	11,393,969	3,565,467	N/A	N/A		None	
12	BayREN	A02	PL1	S1	Lifecycle ex-ante Therm net	S1: Energy Savings	Metric	PL1-S1- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	Lifecycle ex-ante Therm net	Portfolio Level (PL)– All Sectors	2016	5,380,378	N/A	N/A	3,379,571	4,210,657	3,454,318	4,923,006	3,779,885	4,366,842	4,825,742	8,446,886	2,261,924	N/A	N/A		None	
13	BayREN	A02	PL2	S3	First year annual kW gross	S3: DAC Savings	Metric	PL2-S3- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities••	First year annual kW gross in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	2016	17	N/A	N/A	42	76	16	18	26	25	23	35	471	N/A	N/A	kW DAC therms/kWh/kW + MF DAC therms/kWh/kW	D.18-05-041: DAC = Service accounts in zip codes corresponding to census tracts in the top quartile of CalEnviroScreen 3.0 scores.	
14	BayREN	A02	PL2	S3	First year annual kW net	S3: DAC Savings	Metric	PL2-S3- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities••	First year annual kW net in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	2016	16	N/A	N/A	40	57	12	16	20	19	18	26	307	N/A	N/A	kW DAC therms/kWh/kW + MF DAC therms/kWh/kW	D.18-05-041: DAC = Service accounts in zip codes corresponding to census tracts in the top quartile of CalEnviroScreen 3.0 scores.	
15	BayREN	A02	PL2	S3	First year annual kWh gross	S3: DAC Savings	Metric	PL2-S3- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities••	First year annual kWh gross in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	2016	159,003	N/A	N/A	275,058	213,346	263,945	180,287	156,240	167,824	146,230	182,839	2,955,335	N/A	N/A	kW DAC therms/kWh/kW + MF DAC therms/kWh/kW	D.18-05-041: DAC = Service accounts in zip codes corresponding to census tracts in the top quartile of CalEnviroScreen 3.0 scores.	
16	BayREN	A02	PL2	S3	First year annual kWh net	S3: DAC Savings	Metric	PL2-S3- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities••	First year annual kWh net in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	2016	143,103	N/A	N/A	247,552	160,010	197,634	162,258	117,180	134,882	109,672	137,129	2,085,794	N/A	N/A	kW DAC therms/kWh/kW + MF DAC therms/kWh/kW	D.18-05-041: DAC = Service accounts in zip codes corresponding to census tracts in the top quartile of CalEnviroScreen 3.0 scores.	
17	BayREN	A02	PL2	S3	First year annual Therm gross	S3: DAC Savings	Metric	PL2-S3- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities••	First year annual Therm gross in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	2016	13,843	N/A	N/A	17,387	25,125	15,084	12,546	17,984	19,250	18,651	29,183	233,719	N/A	N/A	kW DAC therms/kWh/kW + MF DAC therms/kWh/kW	D.18-05-041: DAC = Service accounts in zip codes corresponding to census tracts in the top quartile of CalEnviroScreen 3.0 scores.	
18	BayREN	A02	PL2	S3	First year annual Therm net	S3: DAC Savings	Metric	PL2-S3- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities••	First year annual Therm net in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	2016	12,459	N/A	N/A	15,649	18,844	11,023	11,291	13,488	14,438	13,988	21,887	153,057	N/A	N/A	kW DAC therms/kWh/kW + MF DAC therms/kWh/kW	D.18-05-041: DAC = Service accounts in zip codes corresponding to census tracts in the top quartile of CalEnviroScreen 3.0 scores.	
19	BayREN	A02	PL2	S3	Lifecycle ex-ante kW gross	S3: DAC Savings	Metric	PL2-S3- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities••	Lifecycle ex-ante kW gross in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	2016	280	N/A	N/A	548	1,294	237	252	313	310	310	419	6,822	N/A	N/A	kW DAC therms/kWh/kW + MF DAC therms/kWh/kW	D.18-05-041: DAC = Service accounts in zip codes corresponding to census tracts in the top quartile of CalEnviroScreen 3.0 scores.	Please note that during data quality review, this 2018 metric was found to be incorrectly entered into Index 19, when it should have been entered into Index 22.
20	BayREN	A02	PL2	S3	Lifecycle ex-ante kW net	S3: DAC Savings	Metric	PL2-S3- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities••	Lifecycle ex-ante kW net in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	2016	238	N/A	N/A	466	971	173	214	219	217	217	293	4,094	N/A	N/A	kW DAC therms/kWh/kW + MF DAC therms/kWh/kW	D.18-05-041: DAC = Service accounts in zip codes corresponding to census tracts in the top quartile of CalEnviroScreen 3.0 scores.	Please note that during data quality review, this 2018 metric was found to be incorrectly entered into Index 20, when it should have been entered into Index 23.
21	BayREN	A02	PL2	S3	Lifecycle ex-ante kWh gross	S3: DAC Savings	Metric	PL2-S3- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities••	Lifecycle ex-ante kWh gross in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	2016	2,497,013	N/A	N/A	3,484,979	3,498,839	3,895,245	2,543,315	6,354,868	2,261,391	1,931,857	2,269,119	32,923,237	N/A	N/A	kW DAC therms/kWh/kW + MF DAC therms/kWh/kW	D.18-05-041: DAC = Service accounts in zip codes corresponding to census tracts in the top quartile of CalEnviroScreen 3.0 scores.	Please note that during data quality review, this 2018 metric was found to be incorrectly entered into Index 21, when it should have been entered into Index 24.
22	BayREN	A02	PL2	S3	Lifecycle ex-ante kWh net	S3: DAC Savings	Metric	PL2-S3- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities••	Lifecycle ex-ante kWh net in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	2016	2,247,311	N/A	N/A	3,136,481	2,624,129	2,919,375	2,288,983	1,621,781	1,696,044	1,448,893	1,701,839	23,775,306	N/A	N/A	kW DAC therms/kWh/kW + MF DAC therms/kWh/kW	D.18-05-041: DAC = Service accounts in zip codes corresponding to census tracts in the top quartile of CalEnviroScreen 3.0 scores.	Please note that during data quality review, this 2018 metric was found to be incorrectly entered into Index 22, when it should have been entered into Index 25.
23	BayREN	A02	PL2	S3	Lifecycle ex-ante Therm gross	S3: DAC Savings	Metric	PL2-S3- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities••	Lifecycle ex-ante Therm gross in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	2016	231,185	N/A	N/A	250,440	429,088	210,537	177,490	285,235	305,346	305,145	500,089	3,550,737	N/A	N/A	kW DAC therms/kWh/kW + MF DAC therms/kWh/kW	D.18-05-041: DAC = Service accounts in zip codes corresponding to census tracts in the top quartile of CalEnviroScreen 3.0 scores.	
24	BayREN	A02	PL2	S3	Lifecycle ex-ante Therm net	S3: DAC Savings	Metric	PL2-S3- First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in disadvantaged communities••	Lifecycle ex-ante Therm net in Disadvantaged Communities	Portfolio Level (PL)– All Sectors	2016	191,772	N/A	N/A	225,396	321,816	155,250	147,231	202,847	217,931	219,995	365,570	2,253,955	N/A	N/A	kW DAC therms/kWh/kW + MF DAC therms/kWh/kW	D.18-05-041: DAC = Service accounts in zip codes corresponding to census tracts in the top quartile of CalEnviroScreen 3.0 scores.	
25	BayREN	A02	PL3	S4	First year annual kW gross	S4: Hard to reach markets	Metric	PL3-S4 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets••	First year annual kW gross in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	2016	-	N/A	N/A	-	-	-	-	319	261	372	546	-	-	-	D.18-05-041 p. 43 - HTR as defined in Resolution G-3497, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for fund to reach customers."	PG&E does not currently collect whether a commercial customer rents their facility or if a customer's primary language is other than English. As a result, this metric
26	BayREN	A02	PL3	S4	First year annual kW net	S4: Hard to reach markets	Metric	PL3-S4 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets••	First year annual kW net in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	2016	-	N/A	N/A	-	-	-	-	208	170	242	356	-	-	-	D.18-05-041 p. 43 - HTR as defined in Resolution G-3497, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for fund to reach customers."	PG&E does not currently collect whether a commercial customer rents their facility or if a customer's primary language is other than English. As a result, this metric
27	BayREN	A02	PL3	S4	First year annual kWh gross	S4: Hard to reach markets	Metric	PL3-S4 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets••	First year annual kWh gross in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	2016	-	N/A	N/A	-	-	-	-	826,584	680,919	970,243	1,420,551	-	-	-	D.18-05-041 p. 43 - HTR as defined in Resolution G-3497, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for fund to reach customers."	PG&E does not currently collect whether a commercial customer rents their facility or if a customer's primary language is other than English. As a result, this metric
28	BayREN	A02	PL3	S4	First year annual kWh net	S4: Hard to reach markets	Metric	PL3-S4 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets••	First year annual kWh net in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	2016	-	N/A	N/A	-	-	-	-	538,224	443,880	632,140	925,710	-	-	-	D.18-05-041 p. 43 - HTR as defined in Resolution G-3497, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for fund to reach customers."	PG&E does not currently collect whether a commercial customer rents their facility or if a customer's primary language is other than English. As a result, this metric
29	BayREN	A02	PL3	S4	First year annual Therm gross	S4: Hard to reach markets	Metric	PL3-S4 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets••	First year annual Therm gross in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	2016	-	N/A	N/A	-	-	-	-	6,297	11,412	14,397	19,619	-	-	-	D.18-05-041 p. 43 - HTR as defined in Resolution G-3497, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for fund to reach customers."	PG&E does not currently collect whether a commercial customer rents their facility or if a customer's primary language is other than English. As a result, this metric
30	BayREN	A02	PL3	S4	First year annual Therm net	S4: Hard to reach markets	Metric	PL3-S4 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets••	First year annual Therm net in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	2016	-	N/A	N/A	-	-	-	-	4,264	7,628	9,628	13,332	-	-	-	D.18-05-041 p. 43 - HTR as defined in Resolution G-3497, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for fund to reach customers."	PG&E does not currently collect whether a commercial customer rents their facility or if a customer's primary language is other than English. As a result, this metric
31	BayREN	A02	PL3	S4	Lifecycle ex-ante kW gross	S4: Hard to reach markets	Metric	PL3-S4 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets••	Lifecycle ex-ante kW gross in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	2016	-	N/A	N/A	-	-	-	-	5,076	4,156	5,936	8,698	-	-	-	D.18-05-041 p. 43 - HTR as defined in Resolution G-3497, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for fund to reach customers."	PG&E does not currently collect whether a commercial customer rents their facility or if a customer's primary language is other than English. As a result, this metric
32	BayREN	A02	PL3	S4	Lifecycle ex-ante kW net	S4: Hard to reach markets	Metric	PL3-S4 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets••	Lifecycle ex-ante kW net in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	2016	-	N/A	N/A	-	-	-	-	3,050	2,498	3,861	5,659	-	-	-	D.18-05-041 p. 43 - HTR as defined in Resolution G-3497, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for fund to reach customers."	PG&E does not currently collect whether a commercial customer rents their facility or if a customer's primary language is other than English. As a result, this metric
33	BayREN	A02	PL3	S4	Lifecycle ex-ante kWh gross	S4: Hard to reach markets	Metric	PL3-S4 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets••	Lifecycle ex-ante kWh gross in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	2016	-	N/A	N/A	-	-	-	-	13,158,777	10,805,378	15,426,628	22,556,093	-	-	-	D.18-05-041 p. 43 - HTR as defined in Resolution G-3497, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for fund to reach customers."	PG&E does not currently collect whether a commercial customer rents their facility or if a customer's primary language is other than English. As a result, this metric
34	BayREN	A02	PL3	S4	Lifecycle ex-ante kWh net	S4: Hard to reach markets	Metric	PL3-S4 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets••	Lifecycle ex-ante kWh net in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	2016	-	N/A	N/A	-	-	-	-	8,561,668	7,035,079	10,041,295	14,681,813	-	-	-	D.18-05-041 p. 43 - HTR as defined in Resolution G-3497, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for fund to reach customers."	PG&E does not currently collect whether a commercial customer rents their facility or if a customer's primary language is other than English. As a result, this metric
35	BayREN	A02	PL3	S4	Lifecycle ex-ante Therm gross	S4: Hard to reach markets	Metric	PL3-S4 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets••	Lifecycle ex-ante Therm gross in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	2016	-	N/A	N/A	-	-	-	-	103,929	185,709	235,637	327,750	-	-	-	D.18-05-041 p. 43 - HTR as defined in Resolution G-3497, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for fund to reach customers."	PG&E does not currently collect whether a commercial customer rents their facility or if a customer's primary language is other than English. As a result, this metric
36	BayREN	A02	PL3	S4	Lifecycle ex-ante Therm net	S4: Hard to reach markets	Metric	PL3-S4 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) in hard-to-reach markets••	Lifecycle ex-ante Therm net in Hard-to-Reach Markets	Portfolio Level (PL)– All Sectors	2016	-	N/A	N/A	-	-	-	-	70,598	124,389	158,025	223,702	-	-	-	D.18-05-041 p. 43 - HTR as defined in Resolution G-3497, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for fund to reach customers."	PG&E does not currently collect whether a commercial customer rents their facility or if a customer's primary language is other than English. As a result, this metric
37	BayREN	A02	PL4	LC	PAC Levelized Cost ($/kW)	Cost per unit saved	Metric	PL4-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	PAC Levelized Cost ($/kW)	Portfolio Level (PL)– All Sectors	2016	433	N/A	N/A	416	407	2,834	486	812	808	544	277	2,072	N/A	N/A	$PAC Cost x Electric Benefits/Total Benefits/$/Lifecycle Net kW/kWh/Therms	None	
38	BayREN	A02	PL4	LC	PAC Levelized Cost ($/kWh)	Cost per unit saved	Metric	PL4-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	PAC Levelized Cost ($/kWh)	Portfolio Level (PL)– All Sectors	2016	0.29	N/A	N/A	0.35	0.22	0.37	0.23	0.24	0.23	0.17	0.09	0.32	N/A	N/A	$PAC Cost x Electric Benefits/Total Benefits/$/Lifecycle Net kW/kWh/Therms	None	
39	BayREN	A02	PL4	LC	PAC Levelized Cost ($/therm)	Cost per unit saved	Metric	PL4-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	PAC Levelized Cost ($/therm)	Portfolio Level (PL)– All Sectors	2016	0.17	N/A	N/A	1.31	1.85	2.50	1.94	3.88	2.84	1.62	1.01	3.76	N/A	N/A	$PAC Cost x Electric Benefits/Total Benefits/$/Lifecycle Net kW/kWh/Therms	None	
40	BayREN	A02	PL4	LC	TRC Levelized Cost ($/kW)	Cost per unit saved	Metric	PL4-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	TRC Levelized Cost ($/kW)	Portfolio Level (PL)– All Sectors	2016	819	N/A	N/A	854	479	3,876	825	932	906	585	324	2,964	N/A	N/A	$TRC Cost x Electric Benefits/Total Benefits/$/Lifecycle Net kW/kWh/Therms	None	
41	BayREN	A02	PL4	LC	TRC Levelized Cost ($/kWh)	Cost per unit saved	Metric	PL4-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	TRC Levelized Cost ($/kWh)	Portfolio Level (PL)– All Sectors	2016	0.54	N/A	N/A	0.56	0.26	0.51	0.39	0.28	0.25	0.18	0.11	0.46	N/A	N/A	$TRC Cost x Electric Benefits/Total Benefits/$/Lifecycle Net kW/kWh/Therms	None	
42	BayREN	A02	PL4	LC	TRC Levelized Cost ($/therm)	Cost per unit saved	Metric	PL4-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	TRC Levelized Cost ($/therm)	Portfolio Level (PL)– All Sectors	2016	0.32	N/A	N/A	2.08	2.18	3.42	3.29	2.78	2.33	1.74	1.09	5.38	N/A	N/A	$TRC Cost x Electric Benefits/Total Benefits/$/Lifecycle Net kW/kWh/Therms	None	
43	BayREN	A02	RSF1	S1	First year annual kW gross	S1: Energy Savings	Metric	RSF1-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers••	First year annual kW gross	Residential (RSF)	2016	1,320	N/A	N/A	792	724	253	1,296	378	352	353	713	206	N/A	N/A		None	
44	BayREN	A02	RSF1	S1	First year annual kW net	S1: Energy Savings	Metric	RSF1-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers••	First year annual kW net	Residential (RSF)	2016	1,188	N/A	N/A	594	543	167	972	283	264	265	535	107	N/A	N/A		None	
45	BayREN	A02	RSF1	S1	First year annual kWh gross	S1: Energy Savings	Metric	RSF1-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers••	First year annual kWh gross	Residential (RSF)	2016	933,329	N/A	N/A	520,164	503,480	643,566	909,496	743,126	1,008,376	1,161,536	1,849,340	1,369,593	N/A	N/A		None	
46	BayREN	A02	RSF1	S1	First year annual kWh net	S1: Energy Savings	Metric	RSF1-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers••	First year annual kWh net	Residential (RSF)	2016	839,996	N/A	N/A	390,123	377,610	415,099	682,122	557,344	756,282	874,152	1,387,005	955,627	N/A	N/A		None	
47	BayREN	A02	RSF1	S1	First year annual Therm gross	S1: Energy Savings	Metric	RSF1-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers••	First year annual Therm gross	Residential (RSF)	2016	200,163	N/A	N/A	138,024	162,731	205,976	219,713	134,051	160,436	212,903	456,127	109,058	N/A	N/A		None	
48	BayREN	A02	RSF1	S1	First year annual Therm net	S1: Energy Savings	Metric	RSF1-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers••	First year annual Therm net	Residential (RSF)	2016	180,147	N/A	N/A	103,518	122,048	117,459	164,784	100,538	124,077	159,677	342,095	59,343	N/A	N/A		'ex ante' refers to claimed savings	
49	BayREN	A02	RSF1	S1	Lifecycle ex-ante kW gross	S1: Energy Savings	Metric	RSF1-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers••	Lifecycle ex-ante kW gross	Residential (RSF)	2016	12,866	N/A	N/A	12,565	18,983	1,570	23,259	3,740	3,642	4,460	7,959	3,192	N/A	N/A		'ex ante' refers to claimed savings	
50	BayREN	A02	RSF1	S1	Lifecycle ex-ante kW net	S1: Energy Savings	Metric	RSF1-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers••	Lifecycle ex-ante kW net	Residential (RSF)	2016	10,936	N/A	N/A	8,795	14,237	1,004	16,281	2,618	2,563	3,122	5,571	1,417	N/A	N/A		'ex ante' refers to claimed savings	
51	BayREN	A02	RSF1	S1	Lifecycle ex-ante kWh gross	S1: Energy Savings	Metric	RSF1-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers••	Lifecycle ex-ante kWh gross	Residential (RSF)	2016	8,926,122	N/A	N/A	4,976,796	12,339,723	4,356,294	16,317,191	6,655,310	9,109,283	10,999,955	16,005,920	11,173,534	N/A	N/A		'ex ante' refers to claimed savings	
52	BayREN	A02	RSF1	S1	Lifecycle ex-ante kWh net	S1: Energy Savings	Metric	RSF1-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers••	Lifecycle ex-ante kWh net	Residential (RSF)	2016	8,033,510	N/A	N/A	3,732,597	9,254,793	2,794,844	12,237,893	4,991,482	6,831,962	8,249,966	12,004,440	8,244,850	N/A	N/A		'ex ante' refers to claimed savings	
53	BayREN	A02	RSF1	S1	Lifecycle ex-ante Therm gross	S1: Energy Savings	Metric	RSF1-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers••	Lifecycle ex-ante Therm gross	Residential (RSF)	2016	3,082,662	N/A	N/A	2,101,867	2,985,906	2,681,295	3,920,632	2,394,300	2,892,731	3,822,696	8,386,960	1,768,336	N/A	N/A		'ex ante' refers to claimed savings	

Table 17: Metrics Compliance Filing

2022-2023 Forecast is embedded in the Mid Term Forecast. Final results are provided in the Annual Report.

Index	PA	AESA Page	AESA Order	Method Code	Units of Measurement	Metric Type	Metric/ Indicator	Business Plan Att A Description	Metric	Sector	Baseline Year	Baseline Number	Baseline Num	Baseline Denom	2017 Achievements	2018 Achievements	2019 Achievements	2018 Target	2019 Target	2020 Target	Mid Term Annual Targets (2021-2023)	Long Term Annual Target (2024-2025)	2020 Achievements	2020 Numerator	2020 Denominator	Methodology	Key Definitions	Proxy Explanation
54	BayREN	A02	RSF1	S1	Lifecycle ex-ante Therm net	S1: Energy Savings	Metric	RSF1-S1-First-year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for Single Family Customers••	Lifecycle ex-ante Therm net	Residential (RSF)	2016	2,774,396	N/A	N/A	1,576,400	2,239,430	1,564,862	2,940,474	1,795,725	2,169,548	2,867,022	6,290,220	914,076	N/A	N/A		'ex ante' refers to claimed savings	
55	BayREN	A03	RSF2	G	MT CO2eq	GHG	Metric	RSF2-G••Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis••	CO2-equivalent of net annual kWh savings	Residential (RSF)	2016	248	N/A	N/A	114	104	139	94	34	48	49	66	555	N/A	N/A		Definition: Single family are defined as Service account on residential rates, with dwelling code of single family home or single family dwelling.	
56	BayREN	A03	RSF3	D1-D	Lifecycle NET kW	D1: Depth of interventions••Per downstream participant	Metric	RSF3-D1D - Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)••	Average lifecycle ex-ante kW net savings per participant - Opt-in - Downstream	Residential (RSF)	2016	4.80	N/A	N/A	6.33	8.72	0.21	10.85	1.45	0.95	0.78	1.11	0.36	1,417	3,881		Per ED: "Energy savings" = lifecycle NET savings.	
57	BayREN	A03	RSF3	D1-D	Lifecycle NET kWh	D1: Depth of interventions••Per downstream participant	Metric	RSF3-D1D - Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)••	Average lifecycle ex-ante kWh net savings per participant - Opt-in - Downstream	Residential (RSF)	2016	3,487	N/A	N/A	2,687	5,671	576	8,159	2,773	2,530	2,062	2,401	2,124	8,244,850	3,881		Per ED: "Energy savings" = lifecycle NET savings.	
58	BayREN	A03	RSF3	D1-D	Lifecycle NET Therms	D1: Depth of interventions••Per downstream participant	Metric	RSF3-D1D - Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)••	Average lifecycle ex-ante Therm net savings per participant - Opt-in - Downstream	Residential (RSF)	2016	1,204	N/A	N/A	1,135	1,372	323	1,960	998	804	713	1,258	236	914,076	3,881		Per ED: "Energy savings" = lifecycle NET savings.	
59	BayREN	A03	RSF3	D1-M	Lifecycle NET kW	D1: Depth of interventions••Per midstream participant	Metric	RSF3-D1M - Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)••	Average lifecycle ex-ante kW net savings per participant - Opt-in - Midstream	Residential (RSF)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A	N/A	N/A		Per discussion with ED, this metric not feasible and PAs agreed instead to report total upstream and midstream savings. "Energy savings" = lifecycle NET savings.	
60	BayREN	A03	RSF3	D1-M	Lifecycle NET kWh	D1: Depth of interventions••Per midstream participant	Metric	RSF3-D1M - Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)••	Average lifecycle ex-ante kWh net savings per participant - Opt-in - Midstream	Residential (RSF)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A	N/A	N/A		Per discussion with ED, this metric not feasible and PAs agreed instead to report total upstream and midstream savings. "Energy savings" = lifecycle NET savings.	
61	BayREN	A03	RSF3	D1-M	LifecycleNET Therms	D1: Depth of interventions••Per midstream participant	Metric	RSF3-D1M - Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)••	Average lifecycle ex-ante Therm net savings per participant - Opt-in - Midstream	Residential (RSF)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A	N/A	N/A		Per discussion with ED, this metric not feasible and PAs agreed instead to report total upstream and midstream savings. "Energy savings" = lifecycle NET savings.	
62	BayREN	A03	RSF3	D1-O	Lifecycle NET kW	D1: Depth of interventions••Per opt out participant	Metric	RSF3-D1O - Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)••	Average lifecycle ex-ante kW net savings per participant - Opt-out	Residential (RSF)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A	N/A	N/A		D1O Key Definitions: 1) The only opt-out program is the Home Energy Report using social norming through neighborhood comparisons 2) Per ED: "Energy savings" = lifecycle NET savings.	
63	BayREN	A03	RSF3	D1-O	Lifecycle NET kWh	D1: Depth of interventions••Per opt out participant	Metric	RSF3-D1O - Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)••	Average lifecycle ex-ante kWh net savings per participant - Opt-out	Residential (RSF)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A	N/A	N/A		D1O Key Definitions: 1) The only opt-out program is the Home Energy Report using social norming through neighborhood comparisons 2) Per ED: "Energy savings" = lifecycle NET savings.	
64	BayREN	A03	RSF3	D1-O	LifecycleNET Therms	D1: Depth of interventions••Per opt out participant	Metric	RSF3-D1O - Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)••	Average lifecycle ex-ante Therm net savings per participant - Opt-out	Residential (RSF)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A	N/A	N/A		D1O Key Definitions: 1) The only opt-out program is the Home Energy Report using social norming through neighborhood comparisons 2) Per ED: "Energy savings" = lifecycle NET savings.	
65	BayREN	A03	RSF3	D1-U	Lifecycle NET kW	D1: Depth of interventions••Per upstream participant	Metric	RSF3-D1U - Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)••	Average lifecycle ex-ante kW net savings per participant - Opt-in - Upstream	Residential (RSF)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A	N/A	N/A		Per discussion with ED, this metric not feasible and PAs agreed instead to report total upstream and midstream savings. "Energy savings" = lifecycle NET savings.	
66	BayREN	A03	RSF3	D1-U	Lifecycle NET kWh	D1: Depth of interventions••Per upstream participant	Metric	RSF3-D1U - Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)••	Average lifecycle ex-ante kWh net savings per participant - Opt-in - Upstream	Residential (RSF)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A	N/A	N/A		Per discussion with ED, this metric not feasible and PAs agreed instead to report total upstream and midstream savings. "Energy savings" = lifecycle NET savings.	
67	BayREN	A03	RSF3	D1-U	LifecycleNET Therms	D1: Depth of interventions••Per upstream participant	Metric	RSF3-D1U - Average savings per participant in both opt-in and opt-out programs (broken down by downstream, midstream and upstream, as feasible)••	Average lifecycle ex-ante Therm net savings per participant - Opt-in - Upstream	Residential (RSF)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	N/A	N/A	N/A		Per discussion with ED, this metric not feasible and PAs agreed instead to report total upstream and midstream savings. "Energy savings" = lifecycle NET savings.	
68	BayREN	A03	RSF4	P1	Percent	P1: Penetration of energy efficiency programs in the eligible market ••Percent of Participation	Metric	RSF-P1-••Percent of participation relative to eligible population••	Percent of participation relative to eligible population	Residential (RSF)	2016	0.00	2,304	1,856,431	0.07%	0.09%	0.26%	0	0	0	0	0	0.21%	3,881	1,890,951		Definition: "Eligible population" refers to Total number of service accounts in sector/segment, excluding CARE. "Participation" is defined as the first instance of participation, should a customer participate more than once or participate in multiple programs in the calendar year.	
69	BayREN	A03	RSF4	P3	Percent	P3: Penetration of energy efficiency programs in the eligible market - DAC	Metric	RSF-P3 - Percent of participation in disadvantaged communities••	Percent of participation in disadvantaged communities	Residential (RSF)	2016	-	N/A	74,906	0.00%	0.06%	0.06%	-	0	0	0	0	0.07%	99	136,661		DAC SF projects / total SF DAC Population in BayREN territory	0.18-05-041: DAC = Service accounts in zip codes corresponding to census tracts in the top quartile of CalEnviroScreen 3.0 scores.	
70	BayREN	A03	RSF4	P4	Percent	P4: Penetration of energy efficiency programs in the HTR market	Metric	RSF-P4 - Percent of participation by customers defined as "hard-to-reach" ••	Percent of participation by customers defined as "hard-to-reach"	Residential (RSF)	2016	-	N/A	47,212	0.00%	0.00%	0.55%	-	0	0	0	0	0.09%	68	75,658			0.18-05-041 p. 43 - HTR as defined in Resolution G-3457, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for hard to reach customers."	Since PG&E does not yet report language data, this metric identifies residential customers as HTR if they meet the geography and income and geography
71	BayREN	A03	RSF5	LC	PAC Levelized Cost ($/kW)	Cost per unit saved	Metric	RSF-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	PAC Levelized Cost ($/kW)	Residential (RSF)	2016	289	N/A	N/A	225	217	2,574	202	1,428	1,452	1,015	385	1,707	N/A	N/A		EPAC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kW/kWh/Therms	None	
72	BayREN	A03	RSF5	LC	PAC Levelized Cost ($/kWh)	Cost per unit saved	Metric	RSF-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	PAC Levelized Cost ($/kWh)	Residential (RSF)	2016	0.39	N/A	N/A	0.53	0.33	0.92	0	1	1	0	0	0.29	N/A	N/A		EPAC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kW/kWh/Therms	None	
73	BayREN	A03	RSF5	LC	PAC Levelized Cost ($/therm)	Cost per unit saved	Metric	RSF-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	PAC Levelized Cost ($/therm)	Residential (RSF)	2016	1.71	N/A	N/A	2.34	1.38	1.65	1	3	2	1	1	2.65	N/A	N/A		EPAC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kW/kWh/Therms	None	
74	BayREN	A03	RSF5	LC	TRC Levelized Cost ($/kW)	Cost per unit saved	Metric	RSF-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	TRC Levelized Cost ($/kW)	Residential (RSF)	2016	524	N/A	N/A	381	204	3,122	462	1,620	1,545	1,012	481	2,172	N/A	N/A		TRC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kW/kWh/Therms	None	
75	BayREN	A03	RSF5	LC	TRC Levelized Cost ($/kWh)	Cost per unit saved	Metric	RSF-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	TRC Levelized Cost ($/kWh)	Residential (RSF)	2016	0.71	N/A	N/A	0.90	0.31	1.12	1	1	1	0	0	0.37	N/A	N/A		TRC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kW/kWh/Therms	None	
76	BayREN	A03	RSF5	LC	TRC Levelized Cost ($/therm)	Cost per unit saved	Metric	RSF-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	TRC Levelized Cost ($/therm)	Residential (RSF)	2016	3.08	N/A	N/A	3.97	1.29	2.00	3	3	2	1	1	3.37	N/A	N/A		TRC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kW/kWh/Therms	None	
77	BayREN	A03	RSFGI	EI1	BTU	Energy intensity per SF household	Indicator	RSF-EI1(Indicator) - Average energy use intensity of single family homes (average usage per household – not adjusted)••	Average first year annual kWh gross per household	Residential (RSF)	2016	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	18,180,527	7,980	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	7,966	15,062,980,677	1,890,951		Total annual kWh gross converted to BTU/total SF housing units (PG&E data)	Definition: Household refers to a service account	
78	BayREN	A03	RMF1	S1-IU	First year annual kW gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and whole building)••	First year annual kW gross - In Unit	Residential Sector – Multi-family (RMF)	N/A - Indicator	91	N/A	N/A	197	166	24	93	56	56	45	34	150	N/A	N/A		1DAMS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings in-unit	Definition: Multi-family refers to any building or property with at least two residential housing units.	
79	BayREN	A03	RMF1	S1-IU	First year annual kW net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and whole building)••	First year annual kW net - In Unit	Residential Sector – Multi-family (RMF)	2016	82	N/A	N/A	211	124	18	83	42	42	34	25	112	N/A	N/A		1DAMS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings in-unit	Definition: Multi-family refers to any building or property with at least two residential housing units.	
80	BayREN	A03	RMF1	S1-IU	First year annual kWh gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and whole building)••	First year annual kWh gross - In Unit	Residential Sector – Multi-family (RMF)	2016	487,945	N/A	N/A	321,096	431,797	344,714	548,229	387,450	387,450	304,425	332,100	748,952	N/A	N/A		1DAMS first year annual gross or net kWh/kW/Therms from in-unit measures * % kWh/kW/Therms of savings in-unit	Definition: Multi-family refers to any building or property with at least two residential housing units.	

Table 17: Metrics Compliance Filing

2022-2023 Forecast is embedded in the Mid Term Forecast. Final results are provided in the Annual Report.

Index	PA	AttA Page	AttA Order	Method Code	Units of Measurement	Metric Type	Metric/ Indicator	Business Plan Att A Description	Metric	Sector	Baseline Year	Baseline Number	Baseline Num	Baseline Denom	2017 Achievements	2018 Achievements	2019 Achievements	2018 Target	2019 Target	2020 Target	Mid Term Annual Targets (2021-2023)	Long Term Annual Target (2024-2025)	2020 Achievements	2020 Numerator	2020 Denominator	Methodology	Key Definitions	Proxy Explanation
81	BayREN	A03	RMF1	S1-IU	First year annual kWh net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual kWh net - In Unit	Residential Sector – Multi-family (RMF)	2016	439,150	N/A	N/A	288,986	323,848	258,535	493,407	290,588	290,588	228,319	249,075	561,714	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings in-unit	Definition: Multi-family refers to any building or property with at least two residential housing units.	
82	BayREN	A03	RMF1	S1-IU	First year annual Therm gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual Therm gross - In Unit	Residential Sector – Multi-family (RMF)	2016	28,434	N/A	N/A	25,291	21,814	32,860	25,535	25,830	25,830	20,664	22,140	26,435	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms from in-unit measures * % kWh/kW/Therms of savings in-unit	Definition: Multi-family refers to any building or property with at least two residential housing units.	
83	BayREN	A03	RMF1	S1-IU	First year annual Therm net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual Therm net - In Unit	Residential Sector – Multi-family (RMF)	2016	25,591	N/A	N/A	22,762	16,361	24,645	22,982	19,373	19,373	15,498	16,605	19,826	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings in-unit	Definition: Multi-family refers to any building or property with at least two residential housing units.	
84	BayREN	A03	RMF1	S1-IU	Lifecycle ex-ante kW gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante kW gross - In Unit	Residential Sector – Multi-family (RMF)	2016	1,460	N/A	N/A	2,866	2,659	304	1,301	846	846	677	508	2,047	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings in-unit	Definition: Multi-family refers to any building or property with at least two residential housing units.	
85	BayREN	A03	RMF1	S1-IU	Lifecycle ex-ante kW net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante kW net - In Unit	Residential Sector – Multi-family (RMF)	2016	1,241	N/A	N/A	2,436	1,994	224	1,106	593	593	474	356	1,505	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings in-unit	Definition: Multi-family refers to any building or property with at least two residential housing units.	
86	BayREN	A03	RMF1	S1-IU	Lifecycle ex-ante kWh gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante kWh gross - In Unit	Residential Sector – Multi-family (RMF)	2016	7,662,758	N/A	N/A	4,068,272	6,813,234	4,442,400	7,733,896	5,811,750	5,811,750	4,566,375	4,981,500	10,065,877	N/A	N/A	CEDARS lifecycle gross or net kWh/kW/Therms from in-unit measures * % kWh/kW/Therms of savings in-unit	Definition: Multi-family refers to any building or property with at least two residential housing units.	
87	BayREN	A03	RMF1	S1-IU	Lifecycle ex-ante kWh net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante kWh net - In Unit	Residential Sector – Multi-family (RMF)	2016	6,896,482	N/A	N/A	3,661,445	5,109,925	3,331,800	6,960,506	4,358,813	4,358,813	3,424,781	3,736,125	7,549,408	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings in-unit	Definition: Multi-family refers to any building or property with at least two residential housing units.	
88	BayREN	A03	RMF1	S1-IU	Lifecycle ex-ante Therm gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante Therm gross - In Unit	Residential Sector – Multi-family (RMF)	2016	474,868	N/A	N/A	364,275	356,500	482,926	361,261	387,450	387,450	309,960	332,100	377,398	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings in-unit	Definition: Multi-family refers to any building or property with at least two residential housing units.	
89	BayREN	A03	RMF1	S1-IU	Lifecycle ex-ante Therm net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante Therm net - In Unit	Residential Sector – Multi-family (RMF)	2016	427,381	N/A	N/A	327,847	267,375	362,195	325,135	290,588	290,588	232,470	249,075	283,048	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings in-unit	Definition: Multi-family refers to any building or property with at least two residential housing units.	
90	BayREN	A03	RMF1	S1-MM	First year annual kW gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual kW gross - Master Metered	Residential Sector – Multi-family (RMF)	2016	-	N/A	N/A	-	75	57	-	-	-	-	-	5	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings master-metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
91	BayREN	A03	RMF1	S1-MM	First year annual kW net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual kW net - Master Metered	Residential Sector – Multi-family (RMF)	2016	-	N/A	N/A	-	57	43	-	-	-	-	-	4	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings master-metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
92	BayREN	A03	RMF1	S1-MM	First year annual kWh gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual kWh gross - Master Metered	Residential Sector – Multi-family (RMF)	2016	-	N/A	N/A	-	394,013	720,259	-	-	-	-	-	27,318	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings master-metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
93	BayREN	A03	RMF1	S1-MM	First year annual kWh net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual kWh net - Master Metered	Residential Sector – Multi-family (RMF)	2016	-	N/A	N/A	-	295,510	540,194	-	-	-	-	-	20,488	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings master-metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
94	BayREN	A03	RMF1	S1-MM	First year annual Therm gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual Therm gross - Master Metered	Residential Sector – Multi-family (RMF)	2016	-	N/A	N/A	-	113,906	121,118	-	-	-	-	-	99,244	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings master-metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
95	BayREN	A03	RMF1	S1-MM	First year annual Therm net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual Therm net - Master Metered	Residential Sector – Multi-family (RMF)	2016	-	N/A	N/A	-	85,430	90,838	-	-	-	-	-	74,433	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings master-metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
96	BayREN	A03	RMF1	S1-MM	Lifecycle ex-ante kW gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante kW gross - Master Metered	Residential Sector – Multi-family (RMF)	2016	-	N/A	N/A	-	1,209	718	-	-	-	-	-	73	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings master-metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
97	BayREN	A03	RMF1	S1-MM	Lifecycle ex-ante kW net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante kW net - Master Metered	Residential Sector – Multi-family (RMF)	2016	-	N/A	N/A	-	907	528	-	-	-	-	-	54	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings master-metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
98	BayREN	A03	RMF1	S1-MM	Lifecycle ex-ante kWh gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante kWh gross - Master Metered	Residential Sector – Multi-family (RMF)	2016	-	N/A	N/A	-	6,217,056	9,282,129	-	-	-	-	-	367,152	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings master-metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
99	BayREN	A03	RMF1	S1-MM	Lifecycle ex-ante kWh net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante kWh net - Master Metered	Residential Sector – Multi-family (RMF)	2016	-	N/A	N/A	-	4,662,792	6,961,596	-	-	-	-	-	275,364	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings master-metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
100	BayREN	A03	RMF1	S1-MM	Lifecycle ex-ante Therm gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante Therm gross - Master Metered	Residential Sector – Multi-family (RMF)	2016	-	N/A	N/A	-	1,861,510	1,779,991	-	-	-	-	-	1,416,858	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings master-metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
101	BayREN	A03	RMF1	S1-MM	Lifecycle ex-ante Therm net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante Therm net - Master Metered	Residential Sector – Multi-family (RMF)	2016	-	N/A	N/A	-	1,396,132	1,334,994	-	-	-	-	-	1,062,644	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings master-metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
102	BayREN	A03	RMF1	SI-CA	First year annual kW gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual kW gross - Common Area	Residential Sector – Multi-family (RMF)	2016	127	N/A	N/A	105	168	140	129	79	79	63	47	112	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings common area metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
103	BayREN	A03	RMF1	SI-CA	First year annual kW net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual kW net - Common Area	Residential Sector – Multi-family (RMF)	2016	114	N/A	N/A	112	126	105	116	59	59	47	35	84	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings common area metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
104	BayREN	A03	RMF1	SI-CA	First year annual kWh gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual kWh gross - Common Area	Residential Sector – Multi-family (RMF)	2016	1,495,570	N/A	N/A	1,879,371	1,358,811	1,056,126	1,680,346	1,187,550	1,187,550	933,075	1,017,900	1,057,150	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings common area metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
105	BayREN	A03	RMF1	SI-CA	First year annual kWh net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual kWh net - Common Area	Residential Sector – Multi-family (RMF)	2016	1,346,013	N/A	N/A	1,691,433	1,019,108	792,094	1,512,311	890,663	890,663	699,806	763,425	792,862	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings common area metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
106	BayREN	A03	RMF1	SI-CA	First year annual Therm gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual Therm gross - Common Area	Residential Sector – Multi-family (RMF)	2016	144,251	N/A	N/A	113,808	25,106	17,444	129,545	131,040	131,040	104,832	112,320	201	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings common area metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
107	BayREN	A03	RMF1	SI-CA	First year annual Therm net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	First year annual Therm net - Common Area	Residential Sector – Multi-family (RMF)	2016	129,826	N/A	N/A	102,427	18,829	13,083	116,591	98,280	98,280	78,624	84,240	151	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings common area metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
108	BayREN	A03	RMF1	SI-CA	Lifecycle ex-ante kW gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante kW gross - Common Area	Residential Sector – Multi-family (RMF)	2016	2,033	N/A	N/A	1,522	2,698	1,763	1,811	1,179	1,179	943	707	1,535	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings common area metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
109	BayREN	A03	RMF1	SI-CA	Lifecycle ex-ante kW net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante kW net - Common Area	Residential Sector – Multi-family (RMF)	2016	1,728	N/A	N/A	3,249	2,023	1,296	1,539	825	825	660	495	1,128	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings common area metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
110	BayREN	A03	RMF1	SI-CA	Lifecycle ex-ante kWh gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante kWh gross - Common Area	Residential Sector – Multi-family (RMF)	2016	23,486,665	N/A	N/A	23,811,559	21,440,400	13,610,512	23,704,705	17,813,250	17,813,250	13,996,125	15,268,500	14,208,042	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings common area metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
111	BayREN	A03	RMF1	SI-CA	Lifecycle ex-ante kWh net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante kWh net - Common Area	Residential Sector – Multi-family (RMF)	2016	21,137,999	N/A	N/A	21,430,403	16,080,300	10,207,884	21,334,235	13,359,938	13,359,938	10,497,094	11,451,375	10,656,031	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings common area metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
112	BayREN	A03	RMF1	SI-CA	Lifecycle ex-ante Therm gross	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante Therm gross - Common Area	Residential Sector – Multi-family (RMF)	2016	2,409,086	N/A	N/A	1,639,248	410,293	256,357	1,832,740	1,965,600	1,965,600	1,572,480	1,684,800	2,875	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings common area metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
113	BayREN	A03	RMF1	SI-CA	Lifecycle ex-ante Therm net	S1: Energy Savings	Metric	RMF-S1-First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) for multifamily customers (in-unit, common area, and master metered accounts)••	Lifecycle ex-ante Therm net - Common Area	Residential Sector – Multi-family (RMF)	2016	1,964,911	N/A	N/A	1,475,323	307,720	192,268	1,494,829	1,335,994	1,335,994	1,068,795	1,145,138	2,157	N/A	N/A	CEDARS first year annual gross or net kWh/kW/Therms * % of kWh/kW/Therms savings common area metered	Definition: Multi-family refers to any building or property with at least two residential housing units.	PG&E consulted the American Community Survey and the 2010-2012 PG&E and SCE Multifamily Energy Efficiency Rebate Program (MFEER)
114	BayREN	A03	RMF2	G	MT CO2eq	GHG	Metric	RMF-G•• Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis••	CO2-equivalent of net annual kWh savings	Residential Sector – Multi-family (RMF)	2016	953	N/A	N/A	1,057	161	846	330	261	241	166	172	912	N/A	N/A	CEDARS Annual Claims Output converted from short tons to metric tons CO2e	Definition: Multi-family refers to any building or property with at least two residential housing units.	
115	BayREN	A04	RMF3	D3a	Lifecycle NET kW	D3: Depth of interventions per building	Metric	RMF-D3 - Energy savings (kWh, kw, therms) per project (building)••••	Lifecycle ex-ante kW net per project (building)	Residential Sector – Multi-family (RMF)	2016	15.88	N/A	N/A	46.05	23.12	6.78	13	8	8	6	3	14.76	2,687	182	CEDARS Lifecycle Gross or Net therms/kWh/kW divided by total # of Buildings	D3 Key Definitions: Project applications are made at the property level (premise ID and service account number) not the building level; building information will be used as is available on project applications - "Energy savings" = Lifecycle NET savings	Since PG&E does not require building information to be collected and reported from vendors, PG&E used an estimate of 6.01 buildings per property from the
116	BayREN	A04	RMF3	D3a	Lifecycle NET kWh	D3: Depth of interventions per building	Metric	RMF-D3 - Energy savings (kWh, kw, therms) per project (building)••••	Lifecycle ex-ante kWh net per project (building)	Residential Sector – Multi-family (RMF)	2016	149,917	N/A	N/A	115,631	121,376	66,563	139,931	95,514	95,514	75,047	54,580	101,543	18,480,803	182	CEDARS Lifecycle Gross or Net therms/kWh/kW divided by total # of Buildings	D3 Key Definitions: Project applications are made at the property level (premise ID and service account number) not the building level; building information will be used as is available on project applications - "Energy savings" = Lifecycle NET savings	Since PG&E does not require building information to be collected and reported from vendors, PG&E used an estimate of 6.01 buildings per property from the
117	BayREN	A04	RMF3	D3a	Lifecycle NET Therms	D3: Depth of interventions per building	Metric	RMF-D3 - Energy savings (kWh, kw, therms) per project (building)••••	Lifecycle ex-ante Therm net per project (building)	Residential Sector – Multi-family (RMF)	2016	13,936	N/A	N/A	8,310	9,255	6,135	9,805	9,551	9,551	7,641	5,458	7,406	1,347,848	182	CEDARS Lifecycle Gross or Net therms/kWh/kW divided by total # of Buildings	D3 Key Definitions: Project applications are made at the property level (premise ID and service account number) not the building level; building information will be used as is available on project applications - "Energy savings" = Lifecycle NET savings	Since PG&E does not require building information to be collected and reported from vendors, PG&E used an estimate of 6.01 buildings per property from the
118	BayREN	A04	RMF3	D4	Lifecycle NET kW	D4: Depth of interventions per property	Metric	RMF-D4 - Average savings per participant Savings per project (property)••	Lifecycle ex-ante kW net per project (property)	Residential Sector – Multi-family (RMF)	2016	0	N/A	N/A	156	66	29	0	0	0	0	0	69	2,687	39	CEDARS Lifecycle Gross or Net therms/kWh/kW divided by # of properties/participants	D4 Definition: "Project (property)" is defined by a unique combination of premise ID and service account. "Energy savings" = Lifecycle NET savings	
119	BayREN	A04	RMF3	D4	Lifecycle NET kWh	D4: Depth of interventions per property	Metric	RMF-D4 - Average savings per participant Savings per project (property)••	Lifecycle ex-ante kWh net per project (property)	Residential Sector – Multi-family (RMF)	2016	333,744	N/A	N/A	392,060	344,707	288,750	358,303	244,571	244,571	192,163	139,755	473,867	18,480,803	39	CEDARS Lifecycle Gross or Net therms/kWh/kW divided by # of properties/participants	D4 Definition: "Project (property)" is defined by a unique combination of premise ID and service account. "Energy savings" = Lifecycle NET savings	
120	BayREN	A04	RMF3	D4	Lifecycle NET Therms	D4: Depth of interventions per property	Metric	RMF-D4 - Average savings per participant Savings per project (property)••	Lifecycle ex-ante Therm net per project (property)	Residential Sector – Multi-family (RMF)	2016	31,024	N/A	N/A	28,175	26,283	26,612	25,105	24,457	24,457	19,566	13,975	34,560	1,347,848	39	CEDARS Lifecycle Gross or Net therms/kWh/kW divided by # of properties/participants	D4 Definition: "Project (property)" is defined by a unique combination of premise ID and service account. "Energy savings" = Lifecycle NET savings	
121	BayREN	A04	RMF3	D5	Lifecycle NET kW	D5: Depth of interventions••Per square foot	Metric	RMF-D5•• Energy savings (kWh, kw, therms) per square foot••	Lifecycle ex-ante kW net per square foot	Residential Sector – Multi-family (RMF)	2016	-	N/A	N/A	0.00	0.00	0.00	0	0	0	0	0	0.00	2,687	4,230,734	CEDARS Lifecycle Gross or Net therms/kWh/kW divided by total square feet of all properties	Per ED: "Energy savings" = lifecycle NET savings.	PG&E does not currently collect square footage data from multi-family program participants, and estimates the average square footage per participant to be 911
122	BayREN	A04	RMF3	D5	Lifecycle NET kWh	D5: Depth of interventions••Per square foot	Metric	RMF-D5•• Energy savings (kWh, kw, therms) per square foot••	Lifecycle ex-ante kWh net per square foot	Residential Sector – Multi-family (RMF)	2016	7	N/A	N/A	6	6	4	4	6	4	3	3	4	18,480,803	4,230,734	CEDARS Lifecycle Gross or Net therms/kWh/kW divided by total square feet of all properties	Per ED: "Energy savings" = lifecycle NET savings.	PG&E does not currently collect square footage data from multi-family program participants, and estimates the average square footage per participant to be 911
123	BayREN	A04	RMF3	D5	Lifecycle NET Therms	D5: Depth of interventions••Per square foot	Metric	RMF-D5•• Energy savings (kWh, kw, therms) per square foot••	Lifecycle ex-ante Therm net per square foot	Residential Sector – Multi-family (RMF)	2016	0.65	N/A	N/A	0.43	0.44	0.37	1	0	0	0	0	0.32	1,347,848	4,230,734	CEDARS Lifecycle Gross or Net therms/kWh/kW divided by total square feet of all properties	Per ED: "Energy savings" = lifecycle NET savings.	PG&E does not currently collect square footage data from multi-family program participants, and estimates the average square footage per participant to be 911
124	BayREN	A04	RMF4	P1-P	Percent	P1: Penetration of energy efficiency programs in the eligible market ••Percent of Participation	Metric	RMF-P1P ••Percent of participation relative to eligible population (by unit, and property)••	Percent of participation relative to eligible population by property	Residential Sector – Multi-family (RMF)	2016	0.01%	125	1,431,478	0.00%	0.32%	0.00%	0	0	0	0	0	0.00%	39	1,514,771	Number of BayREN properties/# of MF properties in BayREN territory from PGE	"Eligible Population" Total number of service accounts in sector/segment, excluding CARE. - "Participation" is defined as the first instance of participation, should a customer participate more than once or participate in multiple programs in the calendar year. PAs also need to have enough information about a customer to determine if the customer is in the eligible population and service territory. "Service account" for households are tagged, coded, and/or have a different rate class in PA	PG&E has not historically tracked and reported the number of unique properties treated through programs that work with MF customers. PG&E will
125	BayREN	A04	RMF4	P1-U	Percent	P1: Penetration of energy efficiency programs in the eligible market ••Percent of Participation	Metric	RMF-P1U ••Percent of participation relative to eligible population (by unit, and property)••	Percent of participation relative to eligible population by unit	Residential Sector – Multi-family (RMF)	2016	0.35%	5,000	1,431,478	0.36%	0.36%	0.68%	0	0	0	0	0	0.55%	3,945	713,638	Total Number Units/ PG&E Total MF Units in BayREN Territory from CoStar	"Eligible Population" Total number of service accounts in sector/segment, excluding CARE. - "Participation" is defined as the first instance of participation, should a customer participate more than once or participate in multiple programs in the calendar year. PAs also need to have enough information about a customer to determine if the customer is in the eligible population and service territory. "Service account" for households are tagged, coded, and/or have a different rate class in PA	PG&E has not historically tracked and reported the number of unique units treated through programs that work with MF customers. PG&E will track this
126	BayREN	A04	RMF4	P2	Percent	P2: Penetration of energy efficiency programs in terms of square feet of eligible population	Metric	RMF-P2 - Percent of square feet of eligible population participating (by property)••	Percent of square feet of eligible population participating (by property)	Residential Sector – Multi-family (RMF)	2016	0.01%	5,000	1,145,182,400	0.36%	0.38%	0.68%	0	0	0	0	0	0.66%	4,230,734	641,874,563	Total square feet / (CoStar data for total MF units x avg square feet (899.44))		PG&E does not currently collect square footage data from multi-family program participants, and estimates the average square footage per participant to be 911
127	BayREN	A04	RMF4	P3: DAC	Percent	P3: Penetration of energy efficiency programs in the eligible market - DAC	Metric	RMF-P3 - Percent of participation in disadvantaged communities••	Percent of participation in disadvantaged communities	Residential Sector – Multi-family (RMF)	2016	0.41%	5,000	100,203	12.50%	0.73%	0.95%	0	0	0	0	0	5.77%	2,881	49,955	# of BayREN MF DAC units/ (CoStar data for total MF Units *.07)	D.18-05-041: DAC = Service accounts in zip codes corresponding to census tracts in the top quartile of CalEnviroScreen 3.0 scores. - "Participant" is defined as a unique person or entity identified through a combination of service account and premise ID and who participants in a ratepayer funded energy efficiency intervention	
128	BayREN	A04	RMF4	P4: HTR	Percent	P4: Penetration of energy efficiency programs in the HTR market	Metric	RMF-P4•• Percent of participation by customers defined as "hard-to-reach"••	Percent of participation by customers defined as "hard-to-reach"	Residential Sector – Multi-family (RMF)	2016	0.00%	N/A	N/A	0.00%	0.00%	0.00%	-	-	-	-	-	0.00%	-	-		D.18-05-041 p. 43 - HTR as defined in Resolution G-3497, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for hard to reach customers." "Participant" is defined as a unique person or entity identified through a combination of service account and premise ID and who participants in a ratepayer funded energy efficiency intervention	Since PG&E does not collect language data, this metric identifies residential customers as HTR if they meet the geography and income and geography
129	BayREN	A04	RMF5	B1	Percent	B1: MF Benchmarking Penetration	Metric	RMF-B1 - Percent of benchmarked multi-family properties relative to the eligible population••••	Percent of benchmarked multi-family properties relative to the eligible population	Residential Sector – Multi-family (RMF)	2016	0.00%	-	1,431,478	0.00%	0.09%	0.00%	0	0	0	0	0	0.00%	7	1,514,771	~~BayREN benchmarked properties/ total MF properties in BayREN Territory~~		PG&E attempted to identify the number of MF properties from the American Community Survey, 2010-2012 Multifamily Energy Efficiency Rebate
130	BayREN	A04	RMF5	B6	Percent	B6: Benchmarking of HTR Properties	Metric	B6(RMF) - Percent of benchmarking by properties defined as "hard-to-reach"••••	Percent of benchmarking by properties defined as "hard-to-reach"	Residential Sector – Multi-family (RMF)	2016	0.00%	N/A	N/A	0.00%	0.00%	0.00%	-	-	-	-	-	0.00%	-	-		"Benchmarking" is defined as benchmarked by Portfolio Manager. Participants are defined as those with Service accounts x premise IDs in HTR market -	Since PG&E does not collect language data, this metric identifies multifamily customers that benchmarked as HTR if they meet the geography and income and
131	BayREN	A04	RMF6	LC	PAC Levelized Cost ($/kW)	Cost per unit saved	Metric	RMF-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	PAC Levelized Cost ($/kW)	Residential Sector – Multi-family (RMF)	2016	1,512	N/A	N/A	497	726	1,786	1,418	2,613	2,316	1,959	1,756	1,129	N/A	N/A	(PAC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kW/kWh/Therms	None	
132	BayREN	A04	RMF6	LC	PAC Levelized Cost ($/kWh)	Cost per unit saved	Metric	RMF-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	PAC Levelized Cost ($/kWh)	Residential Sector – Multi-family (RMF)	2016	0.16	N/A	N/A	0.20	0.14	0.18	0	0	0	0	0	0.16	N/A	N/A	(PAC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kW/kWh/Therms	None	
133	BayREN	A04	RMF6	LC	PAC Levelized Cost ($/therm)	Cost per unit saved	Metric	RMF-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	PAC Levelized Cost ($/therm)	Residential Sector – Multi-family (RMF)	2016	0.58	N/A	N/A	0.70	1.81	1.94	1	2	2	2	1	2.25	N/A	N/A	(PAC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kW/kWh/Therms	None	
134	BayREN	A04	RMF6	LC	TRC Levelized Cost ($/kW)	Cost per unit saved	Metric	RMF-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	TRC Levelized Cost ($/kW)	Residential Sector – Multi-family (RMF)	2016	3,584	N/A	N/A	863	1,097	3,178	2,104	3,241	2,894	2,363	2,084	2,303	N/A	N/A	(TRC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kW/kWh/Therms	None	
135	BayREN	A04	RMF6	LC	TRC Levelized Cost ($/kWh)	Cost per unit saved	Metric	RMF-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	TRC Levelized Cost ($/kWh)	Residential Sector – Multi-family (RMF)	2016	0.38	N/A	N/A	0.34	0.21	0.32	0	0	0	0	0	0.33	N/A	N/A	(TRC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kW/kWh/Therms	None	

Table 17: Metrics Compliance Filing

2022-2023 Forecast is embedded in the Mid Term Forecast. Final results are provided in the Annual Report.

Index	PA	AttA Page	AttA Order	Method Code	Units of Measurement	Metric Type	Metric/ Indicator	Business Plan Att A Description	Metric	Sector	Baseline Year	Baseline Number	Baseline Num	Baseline Denom	2017 Achievements	2018 Achievements	2019 Achievements	2018 Target	2019 Target	2020 Target	Mid Term Annual Targets (2021-2023)	Long Term Annual Target (2024-2025)	2020 Achievements	2020 Numerator	2020 Denominator	Methodology	Key Definitions	Proxy Explanation
136	BayREN	A04	RMF6	LC	TRC Levelized Cost ($/therm)	Cost per unit saved	Metric	RMF-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	TRC Levelized Cost ($/therm)	Residential Sector – Multi-family (RMF)	2016	1.37	N/A	N/A	1.21	2.74	3.44	2	3	2	2	1	4.59	N/A	N/A	(TRC Cost x Electric Benefits/Total Benefits)/Lifecycle Net kW/kWh/Therms	None	
137	BayREN	A04	RMF7i	EI2	BTU/unit	Energy Intensity per MF unit	Indicator	RMF-E12[Indicator] Average energy use intensity of multifamily units. including in-unit accounts)	Average first year ex-ante kWh gross per unit	Residential Sector – Multi-family (RMF)	2016	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	8,515,914	4,299	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	3,220	2,297,566,277	713,638	total annual kWh gross converted to BTUs/total MF housing units		PG&E will use unique premise and account IDs as a proxy for total units in the MF segment until a study provides more accurate information about the MF
138	BayREN	A04	RMF7i	EI3	BTU/sqft	Energy Intensity per MF unit square foot	Indicator	RMF-E13[Indicator] Average energy use intensity of multifamily buildings (average usage per square foot – not adjusted ••	Average first year ex-ante kWh gross per square foot	Residential Sector – Multi-family (RMF)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	10,645	5	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	4	2,297,566,277	641,874,563	total annual kWh gross converted to BTUs/(total MF housing units in BayREN terriorty*899.44 sq. ft)		PG&E will use unique premise and account ID as a proxy for total units in the MF segment until a study provides more accurate information about the MF
139	BayREN	A05	C1	S1	First year annual kW gross	S1: Energy Savings	Metric	C-S1•• - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	First year annual kW gross	Commercial Sector (C)	N/A - Indicator	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1,397	1,129	1,637	2,385	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
140	BayREN	A05	C1	S1	First year annual kW net	S1: Energy Savings	Metric	C-S1•• - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	First year annual kW net	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	908	734	1,064	1,550	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
141	BayREN	A05	C1	S1	First year annual kWh gross	S1: Energy Savings	Metric	C-S1•• - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	First year annual kWh gross	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	3,631,708	2,936,109	4,253,960	6,201,471	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
142	BayREN	A05	C1	S1	First year annual kWh net	S1: Energy Savings	Metric	C-S1•• - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	First year annual kWh net	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	2,360,610	1,908,471	2,765,074	4,030,956	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
143	BayREN	A05	C1	S1	First year annual Therm gross	S1: Energy Savings	Metric	C-S1•• - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	First year annual Therm gross	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	20,412	40,906	52,040	61,338	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
144	BayREN	A05	C1	S1	First year annual Therm net	S1: Energy Savings	Metric	C-S1•• - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	First year annual Therm net	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	13,268	26,589	33,826	39,870	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
145	BayREN	A05	C1	S1	Lifecycle ex-ante kW gross	S1: Energy Savings	Metric	C-S1•• - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	Lifecycle ex-ante kW gross	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	22,349	18,060	26,188	38,159	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
146	BayREN	A05	C1	S1	Lifecycle ex-ante kW net	S1: Energy Savings	Metric	C-S1•• - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	Lifecycle ex-ante kW net	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	13,409	10,836	15,713	22,895	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
147	BayREN	A05	C1	S1	Lifecycle ex-ante kWh gross	S1: Energy Savings	Metric	C-S1•• - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	Lifecycle ex-ante kWh gross	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	58,107,329	46,977,744	68,063,359	99,223,531	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
148	BayREN	A05	C1	S1	Lifecycle ex-ante kWh net	S1: Energy Savings	Metric	C-S1•• - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	Lifecycle ex-ante kWh net	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	37,769,764	30,535,534	44,241,183	64,495,295	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
149	BayREN	A05	C1	S1	Lifecycle ex-ante Therm gross	S1: Energy Savings	Metric	C-S1•• - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	Lifecycle ex-ante Therm gross	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	326,592	654,490	832,646	981,409	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
150	BayREN	A05	C1	S1	Lifecycle ex-ante Therm net	S1: Energy Savings	Metric	C-S1•• - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net)••	Lifecycle ex-ante Therm net	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	212,285	425,419	541,220	637,916	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
151	BayREN	A05	C1	S2	Percent first year annual kW gross	S2: Percent Overall Sectoral Savings	Metric	C-S2 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage••	Percent first year annual kW gross	Commercial Sector (C)	2019	N/A	1,397	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
152	BayREN	A05	C1	S2	Percent first year annual kW net	S2: Percent Overall Sectoral Savings	Metric	C-S2 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage••	Percent first year annual kW net	Commercial Sector (C)	2019	N/A	908	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
153	BayREN	A05	C1	S2	Percent first year annual kWh gross	S2: Percent Overall Sectoral Savings	Metric	C-S2 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage••	Percent first year annual kWh gross	Commercial Sector (C)	2019	N/A	3,631,708	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
154	BayREN	A05	C1	S2	Percent first year annual kWh net	S2: Percent Overall Sectoral Savings	Metric	C-S2 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage••	Percent first year annual kWh net	Commercial Sector (C)	2019	N/A	2,360,610	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
155	BayREN	A05	C1	S2	Percent first year annual Therm gross	S2: Percent Overall Sectoral Savings	Metric	C-S2 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage••	Percent first year annual Therm gross	Commercial Sector (C)	2019	N/A	20,412	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
156	BayREN	A05	C1	S2	Percent first year annual Therm net	S2: Percent Overall Sectoral Savings	Metric	C-S2 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage••	Percent first year annual Therm net	Commercial Sector (C)	2019	N/A	13,268	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
157	BayREN	A05	C1	S2	Percent lifecycle ex-ante kW gross	S2: Percent Overall Sectoral Savings	Metric	C-S2 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage••	Percent lifecycle ex-ante kW gross	Commercial Sector (C)	2019	N/A	22,349	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
158	BayREN	A05	C1	S2	Percent lifecycle ex-ante kW net	S2: Percent Overall Sectoral Savings	Metric	C-S2 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage••	Percent lifecycle ex-ante kW net	Commercial Sector (C)	2019	N/A	13,409	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
159	BayREN	A05	C1	S2	Percent lifecycle ex-ante kWh gross	S2: Percent Overall Sectoral Savings	Metric	C-S2 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage••	Percent lifecycle ex-ante kWh gross	Commercial Sector (C)	2019	N/A	58,107,329	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
160	BayREN	A05	C1	S2	Percent lifecycle ex-ante kWh net	S2: Percent Overall Sectoral Savings	Metric	C-S2 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage••	Percent lifecycle ex-ante kWh net	Commercial Sector (C)	2019	N/A	37,769,764	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
161	BayREN	A05	C1	S2	Percent lifecycle ex-ante Therm gross	S2: Percent Overall Sectoral Savings	Metric	C-S2 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage••	Percent lifecycle ex-ante Therm gross	Commercial Sector (C)	2019	N/A	326,592	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
162	BayREN	A05	C1	S2	Percent lifecycle ex-ante Therm net	S2: Percent Overall Sectoral Savings	Metric	C-S2 - First year annual and lifecycle ex-ante (pre-evaluation) gas, electric, and demand savings (gross and net) as a percentage of overall sectoral usage••	Percent lifecycle ex-ante Therm net	Commercial Sector (C)	2019	N/A	212,285	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
163	BayREN	A05	C2	G	MT CO2eq	GHG	Metric	C-G••Greenhouse gasses (MT CO2eq) Net kWh savings, reported on an annual basis	CO2-equivalent of net annual kWh savings	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	322	243	321	448	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.		
164	BayREN	A05	C3	D2	Percent lifecycle gross kW	D2: Depth of interventions by project	Metric	Energy savings (gross kWh, therms) as a fraction of total project consumption.	Percent lifecycle gross kW	Commercial Sector (C)	2019	N/A	6	N/A	N/A	N/A	N/A	N/A	1	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	N/A - Please disregard this unit of measurement, kW was not required by the Attachment A metric.	
165	BayREN	A05	C3	D2	Percent lifecycle gross kWh	D2: Depth of interventions by project	Metric	Energy savings (gross kWh, therms) as a fraction of total project consumption.	Percent lifecycle gross kWh	Commercial Sector (C)	2019	N/A	15,132	N/A	N/A	N/A	N/A	N/A	1	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	Definition: "Project" is defined as "per application"	
166	BayREN	A05	C3	D2	Percent lifecycle gross Therms	D2: Depth of interventions by project	Metric	Energy savings (gross kWh, therms) as a fraction of total project consumption.	Percent lifecycle gross Therms	Commercial Sector (C)	2019	N/A	170	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	Definition: "Project" is defined as "per application"	
167	BayREN	A05	C4	P1L	Percent	P1: Penetration of energy efficiency programs in the eligible market ••Percent of Participation	Metric	•••C-P1M•••Percent of participation relative to eligible population for small, medium, and large customers••	Percent of participation relative to eligible population for large customers	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	Participation is defined as the first instance of participation, should a customer participate more than once or participate in multiple programs in the calendar year. PAs also need to have enough information about a customer to determine if the customer is in the eligible population and service territory. -	
168	BayREN	A05	C4	P1M	Percent	P1: Penetration of energy efficiency programs in the eligible market ••Percent of Participation	Metric	•••C-P1M•••Percent of participation relative to eligible population for small, medium, and large customers••	Percent of participation relative to eligible population for medium customers	Commercial Sector (C)	2019	N/A	3,385	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	Participation is defined as the first instance of participation, should a customer participate more than once or participate in multiple programs in the calendar year. PAs also need to have enough information about a customer to determine if the customer is in the eligible population and service territory. -	
169	BayREN	A05	C4	P1S	Percent	P1: Penetration of energy efficiency programs in the eligible market ••Percent of Participation	Metric	•C-P1L••Percent of participation relative to eligible population for small, medium, and large customers••	Percent of participation relative to eligible population for small customers	Commercial Sector (C)	2019	N/A	1,953	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	Participation is defined as the first instance of participation, should a customer participate more than once or participate in multiple programs in the calendar year. PAs also need to have enough information about a customer to determine if the customer is in the eligible population and service territory. -	
170	BayREN	A05	C4	P2	Percent	P2: Penetration of energy efficiency programs in terms of square feet of eligible population	Metric	C-P2 - Percent of square feet of eligible population••	Percent of square feet of eligible population	Commercial Sector (C)	2019	N/A	17,578,953	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	"Sq footage" is defined the same way as defined in Energy Star Portfolio Manager, and will be taken (in order of preference) from 1) PA customer databases, or 2) project application forms. Service account number and premise ID number may both be used to determine unique participants.	PG&E also considered using data from the Commercial Saturation Survey to determine square footage, but decided on CEUS based on Commission direction.
171	BayREN	A05	C4	P4	Percent	P4: Penetration of energy efficiency programs in the HTR market	Metric	C-P4- Percent of participation by customers defined as "hard-to-reach"••	Percent of participation by customers defined as "hard-to-reach"	Commercial Sector (C)	2019	N/A	Proxy	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	D.18-05-041 p. 43 - HTR as defined in Resolution G-3497, modified to "include disadvantaged communities (as designated by CalEPA) in the geographic criteria for hard to reach customers."	PG&E does not currently collect whether a commercial customer rents their facility or the customer's primary language is other than English. As a result, this metric
172	BayREN	A05	C5	B2	Percent	Square Footage of Commercial Benchmarking Penetration	Metric	C-B2 - Percent of benchmarked square feet of eligible population••	Percent of benchmarked square feet of eligible population	Commercial Sector (C)	2019	N/A	30,975,480	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	Average square footage information is being obtained through a combination of utility records, market studies (such as the California Saturation Survey), and publicly available sources.	PG&E estimated the total square footage of the commercial sector using data from CEUS.
173	BayREN	A05	C5	B5L	Percent	Benchmarking Penetration for Commercial Sector	Metric	B5(C)L Percent of benchmarked customers relative to eligible population for large customers	Percent of benchmarked customers relative to eligible population for large customers	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.		PG&E considered using data on covered commercial buildings from the AB 802 benchmarking presentation, but decided to use the unique combination of premise
174	BayREN	A05	C5	B5M	Percent	Benchmarking Penetration for Commercial Sector	Metric	B5(C)M Percent of benchmarked customers relative to eligible population for medium customers	Percent of benchmarked customers relative to eligible population for medium customers	Commercial Sector (C)	2019	N/A	642	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.		PG&E considered using data on covered commercial buildings from the AB 802 benchmarking presentation, but decided to use the unique combination of premise
175	BayREN	A05	C5	B5S	Percent	Benchmarking Penetration for Commercial Sector	Metric	B5(C)S••Percent of benchmarked customers relative to eligible population for small customers	Percent of benchmarked customers relative to eligible population for small customers	Commercial Sector (C)	2019	N/A	684	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.		PG&E considered using data on covered commercial buildings from the AB 802 benchmarking presentation, but decided to use the unique combination of premise
176	BayREN	A05	C5	B6		B6: Benchmarking of HTR Properties	Metric	B6(C) - Percent of benchmarking by customers defined as "hard-to-reach"••	Percent of benchmarking by customers defined as "hard-to-reach"	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Unknown	Unknown	Unknown	Unknown	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.		PG&E does not currently collect whether a commercial customer rents their facility or the customer's primary language is other than English. As a result, this metric
177	BayREN	A05	C6	LC	PAC Levelized Cost ($/kW)	Cost per unit saved	Metric	C-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	PAC Levelized Cost ($/kW)	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	256	236	176	126	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
178	BayREN	A05	C6	LC	PAC Levelized Cost ($/kWh)	Cost per unit saved	Metric	C-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	PAC Levelized Cost ($/kWh)	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
179	BayREN	A05	C6	LC	PAC Levelized Cost ($/therm)	Cost per unit saved	Metric	C-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	PAC Levelized Cost ($/therm)	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1	1	1	1	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
180	BayREN	A05	C6	LC	TRC Levelized Cost ($/kW)	Cost per unit saved	Metric	C-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	TRC Levelized Cost ($/kW)	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	298	270	203	146	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
181	BayREN	A05	C6	LC	TRC Levelized Cost ($/kWh)	Cost per unit saved	Metric	C-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	TRC Levelized Cost ($/kWh)	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0	0	0	0	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
182	BayREN	A05	C6	LC	TRC Levelized Cost ($/therm)	Cost per unit saved	Metric	C-LC - Levelized cost of energy efficiency per kWh, therm and kW (use both TRC and PAC)••	TRC Levelized Cost ($/therm)	Commercial Sector (C)	2019	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1	1	1	1	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	None	
183	BayREN	A06	C7i	N1	Percent	NMEC	Indicator	C-N1[Indicator] Fraction of total projects utilizing Normalized Metered Energy Consumption (NMEC) to estimate savings••	Percent of total projects utilizing Normalized Metered Energy Consumption (NMEC) to estimate savings	Commercial Sector (C)	201900.00%	N/A - Indicator	N/A	N/A	N/A	N/A	N/A	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	"Projects" for this metric refers to custom projects. Data will be collected from the CMPA (Custom Measure and Project Archive)	
184	BayREN	A06	C7i	N2	Percent	NMEC	Indicator	C-N2[Indicator] Fraction of total savings (gross kWh and therm) derived from NMEC analysis••	Percent of total savings (gross kWh and therm) derived from NMEC analysis	Commercial Sector (C)	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A - Indicator	N/A	N/A	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.		
185	BayREN	A06	C8i	CS	Percent	Satisfaction	Indicator	C-CS[Indicator] Improvement in customer satisfaction••	Percent Improvement in customer satisfaction	Commercial Sector (C)	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A - Indicator	N/A	N/A	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	Survey development process has not been determined but could be led by PA Measurement & Evaluation staff, with ED oversight; once developed, survey could be fielded continuously as part of PA program implementation. Survey could be ready as soon as Q4 of 2018 for implementation during 2019, metrics data could be available for the 2019 reporting year..	
186	BayREN	A06	C8i	TS	Percent	Satisfaction	Indicator	C-TS[Indicator] Improvement in trade ally satisfaction••	Percent Improvement in trade ally satisfaction	Commercial Sector (C)	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A - Indicator	N/A	N/A	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.	Survey development process has not been determined but could be led by PA Measurement & Evaluation staff, with ED oversight; once developed, survey could be fielded continuously as part of PA program implementation. Survey could be ready as soon as Q4 of 2018 for implementation during 2019, metrics data could be available for the 2019 reporting year..	Informal Survey of Trade Pros found for each of the previous target years. Scale is 1-5, where 5 is high satisfaction. PG&E is indicating increase percentage in
187	BayREN	A06	C9i	F1	Percent	Investment in energy efficiency	Indicator	C-F - [Indicator] Fraction of total investments made by ratepayers and private capital••	Percent of total investments made by ratepayers and private capital	Commercial Sector (C)	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A - Indicator	N/A	N/A	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Due to contract delays, BayREN's commercial resource program will launch in 2021, and did not have any projects or claims in 2020.		
188	BayREN	A10	CS1	S1	Net GWh	S1: Energy Savings	Metric	Net Energy Savings: GWH, M Therms and MW (demand)	Net GWh savings	Codes & Standards (CS)	N/A - Indicator	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A BayREN does not claim any savings for Codes and Standards Program	2018-2025 consistent with adopted goals from D.17-09-025, Tables 1, 2, and 3, p. 37-39; 2016 from CEDARS (spillover not included). Values summed across all four IOUs. "Savings" is defined as Net First year savings.	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
189	BayREN	A10	CS1	S1	Net MMTherms	S1: Energy Savings	Metric	Net Energy Savings: GWH, M Therms and MW (demand)	Net MMTherms savings	Codes & Standards (CS)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A BayREN does not claim any savings for Codes and Standards Program	2018-2025 consistent with adopted goals from D.17-09-025, Tables 1, 2, and 3, p. 37-39; 2016 from CEDARS (spillover not included). Values summed across all four IOUs. "Savings" is defined as Net First year savings.	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
190	BayREN	A10	CS1	S1	Net MW	S1: Energy Savings	Metric	Net Energy Savings: GWH, M Therms and MW (demand)	Net MW savings	Codes & Standards (CS)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A BayREN does not claim any savings for Codes and Standards Program	2018-2025 consistent with adopted goals from D.17-09-025, Tables 1, 2, and 3, p. 37-39; 2016 from CEDARS (spillover not included). Values summed across all four IOUs. "Savings" is defined as Net First year savings.	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the

Table 17: Metrics Compliance Filing

2022-2023 Forecast is embedded in the Mid Term Forecast. Final results are provided in the Annual Report.

Index	PA	AttA Page	AttA Order	Method Code	Units of Measurement	Metric Type	Metric/ Indicator	Business Plan Att A Description	Metric	Sector	Baseline Year	Baseline Number	Baseline Num	Baseline Denom	2017 Achievements	2018 Achievements	2019 Achievements	2018 Target	2019 Target	2020 Target	Mid Term Annual Targets (2021-2023)	Long Term Annual Target (2024-2025)	2020 Achievements	2020 Numerator	2020 Denominator	Methodology	Key Definitions	Proxy Explanation
191	BayREN	A10	CS2	1	Count	Advocacy-Building	Metric	Number of measures supported by CASE studies in rulemaking cycle (current work)	Number of measures supported by CASE studies in rulemaking cycle (current work)	Codes & Standards (CS)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	TBD	TBD	N/A	N/A	N/A	BayREN does not perform Advocacy work and this metric is for Statewide Codes	Baseline and targets for measures supported are for 3 year cycle rather than annual.	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
192	BayREN	A10	CS2	2	Count	Advocacy-Building	Metric	Number of measures adopted by CEC in rulemaking cycle (indicator of past work)	Number of measures adopted by CEC in rulemaking cycle (indicator of past work)	Codes & Standards (CS)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	TBD	TBD	N/A	N/A	N/A	BayREN does not perform Advocacy work and this metric is for Statewide Codes	Baseline and targets for measures supported are for 3 year cycle rather than annual.	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
193	BayREN	A10	CS3	1	Count	Advocacy-Appliance	Metric	Number of T-20 measures supported by CASE studies in rulemaking cycle (current work)	Number of T-20 measures supported by CASE studies in rulemaking cycle (current work)	Codes & Standards (CS)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	TBD	TBD	N/A	N/A	N/A	BayREN does not perform Advocacy work and this metric is for Statewide Codes	Baseline is annual. Targets for measures supported are for 3 year cycle rather than annual. 2017 chosen as baseline since 2016 was zero.	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
194	BayREN	A10	CS3	2	Count	Advocacy-Appliance	Metric	Number of measures adopted by CEC in current year	Number of measures adopted by CEC in current year	Codes & Standards (CS)	2017	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	TBD	TBD	N/A	N/A	N/A	BayREN does not perform Advocacy work and this metric is for Statewide Codes	Baseline is annual. Targets for measures adopted are for 3 year cycle rather than annual.	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
195	BayREN	A10	CS4	1	Count	Advocacy-Federal	Metric	Number of federal standards adopted for which a utility advocated (IOUs to list advocated activities)	Number of federal standards adopted for which a utility advocated (IOUs to list advocated activities)	Codes & Standards (CS)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	TBD	TBD	N/A	N/A	N/A	BayREN does not perform Advocacy work and this metric is for Statewide Codes	Baselines and targets are annual. Any federal standards based upon Title 20 that were adopted will still be included in the federal count.	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
196	BayREN	A10	CS4	2	Count	Advocacy-Federal	Metric	Percent of federal standards adopted for which a utility advocated (#IOU supported / # DOE adopted)	Percent of federal standards adopted for which a utility advocated (#IOU supported / # DOE adopted)	Codes & Standards (CS)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	TBD	TBD	N/A	N/A	N/A	BayREN does not perform Advocacy work and this metric is for Statewide Codes	Baselines and targets are annual.	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
197	BayREN	A10	CS5	1	Count	Reach Codes	Metric	The number of local government Reach Codes implemented (this is a joint IOU and REN effort)	The number of local government Reach Codes implemented (this is a joint IOU and REN effort)	Codes & Standards (CS)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	TBD	TBD	N/A	N/A	N/A	BayREN reach codes efforts are part of the Statewide metrics which are tracked and reported by the IOUs	Targets are total for a three-year Title 24 code cycle. Jurisdictions having multiple reach codes will be counted by reach code rather than by jurisdiction. Accomplishments will be reported from the CEC Reach Codes website (http://www.energy.ca.gov/title24/2013standards/ordinances/).	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
198	BayREN	A11	CS6	1	Count	Compliance Improvement	Metric	Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g. building officials, builders, architects, etc.) and the total size (number of the target audience) by sector. (M)	Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g. building officials, builders, architects, etc.) and the total size (number of the target audience) by sector. (M)	Codes & Standards (CS)	2016	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	TBD	TBD	N/A	N/A	N/A	Not applicable to BayREN	118 live training sessions and 20 webinars in 2017; short, mid, and long-term targets are annual	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
199	BayREN	A11	CS6	2	Count	Compliance Improvement	Metric	Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g. building officials, builders, architects, etc.) and the total size (number of the target audience) by sector. (M)	Number of training activities (classes, webinars) held, number of market actors participants by segment (e.g. building officials, builders, architects, etc.) and the total size (number of the target audience) by sector. (M)	Codes & Standards (CS)	2017	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	TBD	TBD	N/A	N/A	N/A	Not applicable to BayREN	3000 attendees for live training and 600 attendees for webinars in 2017; short, mid, and long-term targets are annual. Attendees will be shown by major segment (i.e., building officials, builders, architects, HERS raters) and target size of each segment will be provided during first metrics reporting.	Since the Potential Study does not distinguish public sector energy savings potential from commercial sector energy savings potential, PG&E analyzed the
200	BayREN	A11	CS6	3	Score	Compliance Improvement	Metric	Increase in code compliance knowledge pre/post training	Increase in code compliance knowledge pre/post training	Codes & Standards (CS)	2017	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	TBD	TBD	N/A	N/A	N/A	Not applicable to BayREN	Code compliance knowledge increase will be tested via pre and post training questionnaires. Surveys will be conducted for training that lasts longer than three hours (in order to preserve time for instruction in shorter training sessions). Questionnaires will be made available during the first metrics reporting.	
201	BayREN	A11	CS6R	1	Percent	Compliance Improvement	Metric	The percentage increase in closed permits for building projects triggering energy code compliance within participating jurisdictions	The percentage increase in closed permits for building projects triggering energy code compliance within participating jurisdictions	Codes & Standards (CS)	2,018	N/A	N/A	N/A	N/A	N/A	N/A	TBD	TBD	TBD	TBD	TBD	N/A	N/A	N/A	In 2019, BayREN explored potential options to evaluate permit closure rates and determined that this metric is difficult to measure in an efficient way. BayREN and 3C-REN anticipated proposing changes to the REN metrics listed in D.18-05-041, including this metric, through the 2021 Annual Budget Advice Letter in September and in		
202	BayREN	A11	CS6Ri	1	Count	Compliance Improvement	Indicator	Number and percent of jurisdictions with staff participating in an Energy Policy Forum	Number and percent of jurisdictions with staff participating in an Energy Policy Forum	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	3300.00%	4600.00%	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	4700.00%	N/A	N/A	Number of City of County local government jurisdictions participating in a Forum.	"Energy Policy Forum": a BayREN hosted event addressing energy use, energy efficiency, and or Title 24 compliance	
203	BayREN	A11	CS6Ri	1	Percent	Compliance Improvement	Indicator	Number and percent of jurisdictions with staff participating in an Energy Policy Forum	Number and percent of jurisdictions with staff participating in an Energy Policy Forum	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	30.28%	42.20%	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	43.12%	47	109	Numerator: Number of City or County local government jurisdictions participating in a Forum; Denominator: Number of City of County local government jurisdictions in BayREN territory (109)	"Energy Policy Forum": a BayREN hosted event addressing energy use, energy efficiency, and or Title 24 compliance	
204	BayREN	A11	CS6Ri	2	Count	Compliance Improvement	Indicator	Number and percent of jurisdictions receiving Energy Policy technical assistance.	Number and percent of jurisdictions receiving Energy Policy technical assistance.	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	41	38	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	72	N/A	N/A	Number of City or County local government jurisdictions in the Bay Area receiving energy policy technical assistance.	"Energy Policy technical assistance": BayREN facilitated technical assistance services to assist with local government activities including but not limited to implementation of energy and energy efficiency related requirements for Title 24 or development of local policies and ordinances that meet or exceed energy and energy efficiency related requirements of Title 24	
205	BayREN	A11	CS6Ri	2	Percent	Compliance Improvement	Indicator	Number and percent of jurisdictions receiving Energy Policy technical assistance.	Number and percent of jurisdictions receiving Energy Policy technical assistance.	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	0	0	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	1	72	109	Numerator: Number of City or County local government jurisdictions in the Bay Area receiving energy policy technical assistance; Denominator: Number of City of County local government jurisdictions in BayREN territory (109)	"Energy Policy technical assistance": BayREN facilitated technical assistance services to assist with local government activities including but not limited to implementation of energy and energy efficiency related requirements for Title 24 or development of local policies and ordinances that meet or exceed Title 24	
206	BayREN	A11	CS6Ri	3	Count	Compliance Improvement	Indicator	Buildings receiving enhanced code compliance support and delivering compliance data to program evaluators	Buildings receiving enhanced code compliance support and delivering compliance data to program evaluators	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	90	92	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	77	N/A	N/A	Number of buildings that received enhanced compliance support	"Enhanced code compliance support": BayREN facilitated compliance improvement services. "Compliance data": may include but is not limited to completed CEC Title 24 Part 6 Compliance Forms and CBECC or other compliance software calculated compliance margins	
207	BayREN	A11	CS6R	1	Percent	Compliance Improvement	Metric	The percentage increase in closed permits for building projects triggering energy code compliance within participating jurisdictions	The percentage increase in closed permits for building projects triggering energy code compliance within participating jurisdictions	Codes & Standards (CS)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	In 2019, BayREN explored potential options to evaluate permit closure rates and determined that this metric is difficult to measure in an efficient way. BayREN is proposing the removal of this metric through the 2021 Annual Budget Advice Letter in consultation with Commission staff. Details are in the 2019 Annual Report.		
208	BayREN	A11	CS6Ri	1	Count	Compliance Improvement	Indicator	Number of organizations with staff participating in an Energy Policy Forum	Number and percent of jurisdictions with staff participating in an Energy Policy Forum	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Number of organizations with staff attending Codes & Standards Energy Policy Forums		
209	BayREN	A11	CS6Ri	1	Percent	Compliance Improvement	Indicator	Percent of jurisdictions with staff participating in an Energy Policy Forum	Number and percent of jurisdictions with staff participating in an Energy Policy Forum	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Numerator: Number of City or County local government jurisdictions participating in a Forum; Denominator: Number of City of County local government jurisdictions in BayREN territory (109)		
210	BayREN	A11	CS6Ri	2	Count	Compliance Improvement	Indicator	Number of organizations directly engaged in Codes & Standards activities	Number and percent of jurisdictions receiving Energy Policy technical assistance.	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Number of organizations attending Codes & Standards Energy Policy Forums, trainings, or other activities		
211	BayREN	A11	CS6Ri	2	Percent	Compliance Improvement	Indicator	Percent of jurisdictions directly engaged in Codes & Standards activities	Number and percent of jurisdictions receiving Energy Policy technical assistance.	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Number of City or County local government jurisdictions in the Bay Area receiving energy policy technical assistance		
212	BayREN	A11	CS6Ri	3	Count	Compliance Improvement	Indicator	Buildings receiving enhanced code compliance support	Buildings receiving enhanced code compliance support and delivering compliance data to program evaluators	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Number of buildings that received enhanced compliance support		
213	BayREN	A11	CS6Ri	2	Count	Compliance Improvement	Indicator	Total number of attendees participating in an Energy Policy Forum	Total number of attendees participating in an Energy Policy Forum	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Number of attendees participating in an Energy Policy Forum		
214	BayREN	NA	NA	BVM1	Count	BayREN Value Metric	Indicator	Jurisdictions adopt and implement energy policies and reach codes	Number of jurisdictions that adopt and implement reach codes or energy policies	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Count of jurisdictions that adopt and implement reach codes or energy policies. This will be provided with a description of those codes (in accompanying document).	A jurisdiction is a city, town, county in BayREN's service territory. There are 110 BayREN jurisdictions.	
215	BayREN	NA	NA	BVM1	Count	BayREN Value Metric	Indicator	Local Governments (LGs) institutionalize the use of BayREN guides and tools for code compliance	Number of jurisdictions that use BayREN guides and tools for code compliance	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Count of jurisdictions that use BayREN guides and tools for code compliance such as permit guides, CodeCycle, ePermit tools, etc.	A jurisdiction is a city, town, county in BayREN's service territory. There are 110 BayREN jurisdictions.	Institutionalized indicates that it has become part of the normal process. Evaluation activities could follow up to determine this (via survey/observation),
216	BayREN	NA	NA	BVM1	Count	BayREN Value Metric	Indicator	Water utilities offer onbill mechanism	Number of water utilities offering programs with BayREN on-bill mechanism	Portfolio Level - All Sectors	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Count of water utilities offering programs with BayREN on-bill mechanism	Value would be cumulative over time	
217	BayREN	NA	NA	BVM1	Count	BayREN Value Metric	Indicator	Regional fund to support water/energy projects	Amount of regional funds allocated	Portfolio Level - All Sectors	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Total regional funds (millions of dollars)		Note that the program will also be tracking allocated funds but this value measures the infrastructure.
218	BayREN	NA	NA	BVM1	Count	BayREN Value Metric	Indicator	LG staff knowledgeable of energy code requirements and best practices for code compliance	Count of jurisdictions with staff who attend a BayREN energy code training	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Counts from attendance records/sign-in sheets		
219	BayREN	NA	NA	BVM1	Count	BayREN Value Metric	Indicator	LG staff knowledgeable of energy code requirements and best practices for code compliance	Count of local government staff who indicate an increase in energy code requirements and best practices for code compliance	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Survey after training		
220	BayREN	NA	NA	BVM1	Percent	BayREN Value Metric	Indicator	LG staff knowledgeable of energy code requirements and best practices for code compliance	Percent of local government staff who indicate an increase in energy code requirements and best practices for code compliance	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Survey after training		
221	BayREN	NA	NA	BVM1	Count	BayREN Value Metric	Indicator	LG staff expand energy policy knowledge and/or networks that enable future energy policy work	Count of jurisdictions with staff who attend a BayREN forum	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Counts from attendance records/sign-in sheets		
222	BayREN	NA	NA	BVM1	Count	BayREN Value Metric	Indicator	LG staff expand energy policy knowledge and/or networks that enable future energy policy work	Count of respondents who indicate they increased their energy policy knowledge	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Survey after forum		
223	BayREN	NA	NA	BVM1	Percent	BayREN Value Metric	Indicator	LG staff expand energy policy knowledge and/or networks that enable future energy policy work	Percent of respondents who indicate they increased their energy policy knowledge	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Survey after forum		
224	BayREN	NA	NA	BVM1	Count	BayREN Value Metric	Indicator	LG staff expand energy policy knowledge and/or networks that enable future energy policy work	Count of respondents who indicate forum expanded their energy efficiency networks (helping to build relationships that will enable future energy policy work)	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Survey after forum		
225	BayREN	NA	NA	BVM1	Percent	BayREN Value Metric	Indicator	LG staff expand energy policy knowledge and/or networks that enable future energy policy work	Percent of respondents who indicate forum expanded their energy efficiency networks (helping to build relationships that will enable future energy policy work)	Codes & Standards (CS)	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Survey after forum		
226	BayREN	NA	NA	BVM1	Count	BayREN Value Metric	Indicator	Local realtors and appraisers green certified	Number of realtors and appraisers certified (e.g., National Green Certified Real Estate Professionals)	Portfolio Level - All Sectors	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Count of realtors and appraisers certified (e.g., National Green Certified Real Estate Professionals)		
227	BayREN	NA	NA	BVM1	Count	BayREN Value Metric	Indicator	Local contractors proficient with decarb measures	Number of trained contractors who have performed 3+ projects of decarbonization measures	Residential Sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Count of trained contractors who have performed 3+ projects of decarbonization measures		
228	BayREN	NA	NA	BVM1	Count	BayREN Value Metric	Indicator	Local lenders trained and knowledgeable of EE financing options	Number of local lenders trained	Portfolio Level - All Sectors	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Counts from attendance records/sign in sheets		
229	BayREN	NA	NA	BVM1	Percent	BayREN Value Metric	Indicator	Local lenders trained and knowledgeable of EE financing options	Percent of local lenders trained who report an increase in knowledge about EE financing options	Portfolio Level - All Sectors	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Survey after training		
230	BayREN	NA	NA	BVM2	Count	BayREN Value Metric	Indicator	SFMI Households served	Number of SFMI Households	Residential Sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Count of participating SFMI households	SFMI based on household income between $48,000 and $125,000	
231	BayREN	NA	NA	BVM2	First year annual net kWh	BayREN Value Metric	Indicator	SFMI Energy Savings	kWh saved by SFMI households	Residential Sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	ex ante net kWh saved	SFMI based on household income between $48,000 and $125,000	
232	BayREN	NA	NA	BVM2	First year annual net kW	BayREN Value Metric	Indicator	SFMI Energy Savings	kW saved by SFMI households	Residential Sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	ex ante net kW saved	SFMI based on household income between $48,000 and $125,000	
233	BayREN	NA	NA	BVM2	First year annual net therms	BayREN Value Metric	Indicator	SFMI Energy Savings	Therms saved by SFMI households	Residential Sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	ex ante net therms saved	SFMI based on household income between $48,000 and $125,000	
234	BayREN	NA	NA	BVM2	Count	BayREN Value Metric	Indicator	MF Sites served	MF small and/or owner occupied buildings (i.e., LDTS)	Residential Sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Count of participating MF buildings	MF buildings (all and local difficult to serve populations). See implementation plan for list of local difficult to serve populations.	
235	BayREN	NA	NA	BVM2	Count	BayREN Value Metric	Indicator	MF tenants (units) served	MF small and/or owner occupied tenant units (i.e., LDTS)	Residential Sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Count of participating MF tenant units	MF buildings (all and local difficult to serve populations). See implementation plan for list of local difficult to serve populations.	
236	BayREN	NA	NA	BVM2	First year annual net kWh	BayREN Value Metric	Indicator	MF energy savings in MF units and common areas	kWh saved - MF small and owner occupied (i.e., LDTS)	Residential Sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	ex ante net kWh saved	MF buildings (all and local difficult to serve populations). See implementation plan for list of local difficult to serve populations.	
237	BayREN	NA	NA	BVM2	First year annual net kW	BayREN Value Metric	Indicator	MF energy savings in MF units and common areas	kWh saved - MF small and owner occupied (i.e., LDTS)	Residential Sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	ex ante net kW saved	MF buildings (all and local difficult to serve populations). See implementation plan for list of local difficult to serve populations.	
238	BayREN	NA	NA	BVM2	First year annual net therms	BayREN Value Metric	Indicator	MF energy savings in MF units and common areas	therms saved - MF small and owner occupied (i.e., LDTS)	Residential Sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	ex ante net therms saved	MF buildings (all and local difficult to serve populations). See implementation plan for list of local difficult to serve populations.	
239	BayREN	NA	NA	BVM2	Count	BayREN Value Metric	Indicator	SMB customers served	SMB customers	Commercial sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Count of participating customers	SMBs are defined as meeting one of three criteria: less than 50,000 sq. ft. in size; use less than 500,000 kWhs/year; or use less than 250,000 Therms/year	
240	BayREN	NA	NA	BVM2	First year annual net kWh	BayREN Value Metric	Indicator	SMB Energy Savings	kWh saved - SMB	Commercial sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	ex ante net kWh saved	SMBs are defined as meeting one of three criteria: less than 50,000 sq. ft. in size; use less than 500,000 kWhs/year; or use less than 250,000 Therms/year.	Will track ALL, HTR and DAC
241	BayREN	NA	NA	BVM2	First year annual net kW	BayREN Value Metric	Indicator	SMB Energy Savings	kWh saved - SMB	Commercial sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	ex ante net kW saved	SMBs are defined as meeting one of three criteria: less than 50,000 sq. ft. in size; use less than 500,000 kWhs/year; or use less than 250,000 Therms/year	Will track ALL, HTR and DAC
242	BayREN	NA	NA	BVM2	First year annual net therms	BayREN Value Metric	Indicator	SMB Energy Savings	therms saved - SMB	Commercial sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	ex ante net therms saved	SMBs are defined as meeting one of three criteria: less than 50,000 sq. ft. in size; use less than 500,000 kWhs/year; or use less than 250,000 Therms/year	Will track ALL, HTR and DAC
243	BayREN	NA	NA	BVM3	Milestones	BayREN Value Metric	Indicator	ZNC/Clean Heating Pathway Innovative Solution Pilot	Pilot ready to scale (see method column)	Residential Sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Metric expected to be met in three years (2023). Mid-pilot evaluation to assess implementation and share lessons learned planned for 2021.		
244	BayREN	NA	NA	BVM3	Milestones	BayREN Value Metric	Indicator	SMB P4P Model Pilot	Pilot ready to scale (see method column)	Commercial sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Metric expected to be met in five years (2025). Mid-pilot evaluation to assess implementation and share lessons learned planned for 2022 or 2023		
245	BayREN	NA	NA	BVM3	Milestones	BayREN Value Metric	Indicator	Water Energy Nexus Program Pilot	Pilot used regionally to meet State water goals (see method column)	Portfolio Level - All Sectors	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Metric expected to be met in five years (2025). Mid-pilot evaluation to assess implementation and share lessons learned planned for 2023 or 2024		

Table 17: Metrics Compliance Filing

2022-2023 Forecast is embedded in the Mid Term Forecast. Final results are provided in the Annual Report.

Index	PA	AESA Page	AESA Order	Method Code	Units of Measurement	Metric Type	Metric/ Indicator	Business Plan Att A Description	Metric	Sector	Baseline Year	Baseline Number	Baseline Num	Baseline Denom	2017 Achievements	2018 Achievements	2019 Achievements	2018 Target	2019 Target	2020 Target	Mid Term Annual Targets (2021-2023)	Long Term Annual Target (2024-2025)	2020 Achievements	2020 Numerator	2020 Denominator	Methodology	Key Definitions	Proxy Explanation
246	BayREN	NA	NA	BVM3	Milestones	BayREN Value Metric	Indicator	Water Energy Nexus Program Pilot	Pilot able to report energy and water program metrics data using agreed upon protocols (see method column)	Portfolio Level - All Sectors	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Metric expected to be met in five years (2025). Mid-pilot evaluation to assess implementation and share lessons learned planned for 2023 or 2024		
247	BayREN	NA	NA	BVM3	Milestones	BayREN Value Metric	Indicator	Regional Mechanism(s) to Make Energy Assets Transparent at Time of Sale	Pilot mechanisms to make assets transparent at time of sale are institutionalized (see method column)	Residential Sector	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	NA	NA	N/A - Indicator	N/A - Indicator	N/A - Indicator	N/A	N/A	N/A	Metric expected to be met in four years (2024). Mid-pilot evaluation to assess implementation and share lessons learned planned for 2021 or 2022		

Bay Area Regional Energy Network (BayREN)

Advice Letter 21-E

2022-2023 BBAL

Attachment B – Supplemental Budget Information

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Attachment B

Approved Meet & Confer Document by Program Administrators, Office of Ratepayers and The Utility Reform Network

BACKGROUND:

Decision (D.) 18-05-041 Ordering Paragraph 44 states:

> Beginning with the annual budget advice letters due on September 3, 2019, the program administrators must include updated budget estimates in the same format as the supplemental budget information filed in this proceeding on June 12, 2017.

Therefore, consistent with this Commission direction, this narrative and the accompanying Attachment A Tables 9 through 16, the Association of Bay Area Governments (ABAG), on behalf of the San Francisco Bay Area Regional Energy Network (BayREN), provides the following information in Attachment B.

I. DESCRIPTION OF IN-HOUSE EE ORGANIZATIONAL STRUCTURE & ASSOCIATED COSTS

A. Narrative description of in-house departments/organizations supporting the PA's EE portfolio

ABAG was created in 1961 to provide a forum for local elected officials to discuss topical issues, specifically around regional planning and, in later years, services. ABAG was the first Council of Governments established in California – recognizing that community issues transcend local boundaries, ABAG now examines issues of regional and local concern by addressing planning and research needs related to land use, environmental, and water resource protection. Through this mission, ABAG also builds local governments' capacity regarding disaster resilience and energy and water efficiency and provides financial services to local counties, cities, and towns. On July 16, 2012 ABAG filed a Motion for Consideration of the BayREN requesting be a program administrator of energy efficiency funds; the Commission granted said motion in D.12-11-005. ABAG has administered BayREN since January 1, 2013.

In July 2017, through a contract for services[1], the staff of ABAG were consolidated under the Metropolitan Transportation Commission (MTC), the transportation planning, financing, and coordinating agency for the nine-county San Francisco Bay Area. As a result of the staff

[1] https://abag.ca.gov/sites/default/files/mtc_abag_approved_contract_for_services_final.pdf

consolidation, MTC's policies for administration, personnel, payroll, employee relations purchasing, contracting, and other business operations apply to the operations of ABAG and, by extension, BayREN.

1. Functions conducted by each department/organization

Multiple sections within ABAG/MTC support work on BayREN, including Energy, Administration and Facilities, Technology Services, Budget and Revenue, Treasury, the Office of General Counsel, and Executive Management. The Energy Section is the only department with full-time staff employed with EE funding; it is also the only section that directly charges to the BayREN budget. Appendices B, and C describe function descriptions performed by each respective department and role(s) that support BayREN's EE portfolio.

2. Energy Efficiency Management Structure and Org Chart

The consolidated staff of ABAG and MTC function under one executive director; however, ABAG and MTC continue to be separate governance entities with their own statutory authorities and responsibilities, policy positions, assets, liabilities, revenues, debts and local collaboration programs. Appendix A depicts the ABAG/MTC governance structure and consolidated organizational chart.

3. Staffing needs by department/organization, including current and forecast for 2018, as well as a description of what changes are expected in the near term (2022-2023) or why it's impossible to predict beyond 2022, if that's the PA's position.

Full Time Equivalents (FTEs) are a unit of measure showing how many employees work on BayREN assuming all employees work a full-time schedule. For the purposes of this exercise, a full-time schedule refers to a 34.4-hour work week, or 1,788 hours worked a year. In 2020, ABAG/MTC employed 3.7 FTE's supporting BayREN, or about 6,567 total hours. In 2022 and 2023, BayREN forecasts having 4.4 FTEs supporting BayREN's EE portfolio each year, or about 7,867 hours, primarily due to the addition of a Energy Programs Finance Coordinator anticipated to be hired in late 2021. Appendix C provides FTEs by functional group, as defined by the functional definitions developed jointly by the PAs, TURN, and the Office of Ratepayer Advocates.

4. Non-program functions currently performed by contractors (e.g. advisory consultants), as well as a description of what changes are expected in the near term (2022-20223) or why it's impossible to predict beyond 2022, if that's the PA's position.

ABAG currently has no consultants retained solely for the purpose of engaging in "non-program functions". Certain consultants have scopes of work that include tasks related to general BayREN communications and regulatory support. ABAG will continue to engage consultants to support these BayREN specific tasks.

5. Anticipated drivers of in-house cost changes by department/organization

We interpret 'in-house cost' to be any BayREN-associated cost (including labor) paid directly by ABAG/MTC. Based on this interpretation, these costs are driven by the addition of new staff and/or an increase to our program portfolio.

6. Explanation of method for forecasting costs

ABAG/MTC does not maintain accounting records in the cost categories specified in the supplemental EE excel file (template), submitted concurrently herewith. Therefore, to prepare these responses, staff analyzed actual historical costs and estimated the amount that was spent in the various cost categories. The relative historical amounts in each category were then applied to future budgets to estimate the forecasted amounts in the requested categories. Costs are estimated by using a 'bottom-up' approach at the program level. Each BayREN program lead estimates the required administration, marketing, implementation, and incentives needed based on the expected scope and participation in the program. Where appropriate, forecasts include anticipated impacts related to the Covid-19 pandemic.

B. Table showing PA EE "Full Time Equivalent" headcount by department/organization

7. TURN and CAL PA like this example, taken from testimony PG&E's 2017 GRC addressing its Energy Procurement department. We would be looking for 2016 or 2017 "recorded" positions, depending on what's most appropriate for the PA, or both, if that provides the most clarity. For forecast years, we'd want at least 2018.

BayREN's response is provided in Attachment A – Table 10 'Portfolio FTE'.

C. Table showing costs by functional area of management structure

8. Expenses broken out into labor, non-labor O&M (with contract labor identified) (* Note, in case of conflict, excel budget template will control.)

BayREN's response is provided in Attachment A – Tables 9 'Portfolio Summary', and Tables 10-16, containing budget request details.

9. Identify any capital costs

BayREN does not have any capital costs included in its budget request.

D. Table showing cost drivers across the EE organization

10. TURN and CAL PA like this example, taken from testimony PG&E's 2017 GRC addressing its Energy Procurement department.

The BayREN administrative budget includes costs associated with the general functioning of the approved programs, as well as activities required for overall management of the portfolio.[2] These tasks are typically standardized across all programs in the portfolio and include: accounting, reporting, legal, regulatory compliance, regular BayREN staff meetings, and procurement/contracting. Given the relatively small size of staff working on BayREN, many activities are split between administration and implementation, resulting in efficiencies and overall lower administrative costs.

The Energy Efficiency Policy Manual, Version 5, lists discrete activities under the recognized budget categories for administration and implementation. The level of need for each of these activities will impact the budget.

The overall drivers of administrative costs include:

- The number of programs in the portfolio
- The number of participating agencies
- Procurement and contracting with expansion of portfolio and natural timeline for current programs

[2] D.12-11-015 did not limit BayREN's administrative budget as prior decisions have done for the IOUs. However, the BayREN's Business Plan sets forth an administrative budget below 10%.

- Increased regulatory participation
- Reporting requirements
- IT services

The drivers of implementation costs include:

- The number of participants in a program
- Processing of rebate applications
- Inspecting rebated/incentive measures
- Engineering related activities
- Measurement development
- Education and training of contractors/partners/customers
- Project management activities (i.e. Planning Scope of Work, working with contractors and customers, setting goals, reviewing goals, reacting to market conditions, and responding to customer inquiries (i.e. calls, emails, letters)
- Program planning, development and design
- Customer support
- Energy audits and continuous energy improvement
- Market transformation and long-term strategic plan support
- Compiling and maintaining information (i.e., data, customer records) for projects
- Licensing fees or IT development cost for program specific applications for implementation (e.g., benchmarking tool or project management tool);
- Direct-implementation specific IT costs (e.g., licensing fees or IT development cost for program-specific applications)
- Staff travel to undertake direct implementation-specific work activities (excluding conference participation)
- Program planning/design/project management and information gathering costs related to specific Strategic Plan related non-resource and resource programs

- Whether the program is new or existing
- The amount of technical assistance provided both in terms of customers and effort[3]
- If the program target is a "hard-to-reach" market since this typically requires more interaction/education/marketing to get the customer to act

E. Explanation of allocation of labor and O&M costs between EE-functions and GRC-functions or other non-EE functions

11. When an employee spends less than 100% of her/his time on EE, how are costs tracked and recovered (e.g., on a pro rata basis between EE rates and GRC rates; when time exceeds a certain threshold, all to EE; etc.).

While ABAG is not engaged in 'GRC-functions', both ABAG and MTC consistently implement grant-funded projects which necessitate systems to ensure all staff time is tracked on an hourly basis by program and fund source. ABAG staff time spent on BayREN activities is tracked within time sheets that are reviewed by appropriate management before submission to the MTC finance department (payroll) on a bi-weekly basis.[4] On a monthly basis, ABAG provides a report to PG&E (BayREN's fiscal agent), which includes all expenses associated with the EE portfolio, including staff time itemized by individual, rate, program and budget category (administration, marketing, and implementation). Operating budgets, current expenditures, and remaining budgets are clearly identified in a format proposed by PG&E.

12. Describe the method used to determine the proportion charged to EE balancing accounts for all employees who also do non-EE work.

Approximately 4 FTE EE employees (as calculated and identified in Section I.3) directly charge time to EE programs. The hourly rates for all ABAG/MTC employees are fully loaded. Therefore, the cost of non-EE employees performing general functions which qualify as overhead (e.g., Administration and Facilities, Technology Services, Legal, etc.) are shared amongst the

[3] Technical assistance (for at least the multifamily program) is planned to decline over time and shift to implementation activities that leverage other marked drivers.

[4] Time sheets are reviewed and approved by the Energy Programs Manager, the Executive Office, and accounting staff.

agency and contained within the fully loaded rate of EE employees. In the event there is no direct staff time charged to EE work, the EE programs do not incur an overhead cost.

13. Identify the EE functions that are most likely to be performed by employees who also do non-EE work (e.g. Customer Account Representatives?)

The departments containing employees who are likely to perform EE functions but that also do non-EE work, as identified in Appendix A, are Administration and Facilities, Technology Services, Budget and Revenue, Treasury, the Office of General Counsel, and Executive Management. Appendix A.1 and A.2 contain the department, function, and personnel descriptions.

15. How are burden benefit-related administrative and general (A&G) expenses for employees who work on EE programs recovered (EE rates or GRC rates)? **PG&E allocates these costs to EE pursuant to a settlement agreement with MCE and TURN, which was adopted in D.14-08-032.

Not applicable.

16. When EE and non-EE activities are supported by the same non-labor resources, how are the costs of those resources or systems allocated to EE and non-EE activities?

General administrative resources are allocated via the overhead rate included in all labor rates. Labor costs are charged to individual programs (BayREN or non-BayREN) as appropriate, and thus the overhead costs are spread appropriately to the individual programs.

17. Identify the EE O&M costs that are most likely to be spread to non-EE functions as well as EE, if any

General administrative resources are allocated via the overhead rate included in all labor rates. Labor costs are charged to individual programs (BayREN or non-BayREN) as appropriate, and thus the overhead costs are spread appropriately to the individual programs.

II. BUDGET TABLES INCLUDING INFORMATION IDENTIFIED IN THE SCOPING MEMO

This section refers to the April 14, 2017 Scoping Memo and Ruling of Assigned Commissioner and Administrative Law Judges in A.17-01-003 et. al.

A. Attachment-A, Question C.8

"Present a single table summarizing energy savings targets, and expenditures by sector (for the six specified sectors). This table should enable / facilitate assessment of relative contributions of the sectors to savings targets, and relative cost-effectiveness."

18. TURN and CAL PA invite the PAs to propose a common table format for this information. We don't have anything specific in mind. Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.8 Table.

BayREN's response is provided in Attachment A – Table 7.

B. Attachment-A, Question C.9

"Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a "meet and confer" session), display how much of each year's budget each PA anticipates spending "in-house" (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program."

19. TURN and CAL PA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.

BayREN's response is provided in Attachment A, Tables 11 through 16.

20. Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

ABAG has administered BayREN since its inception, and currently uses a blended approach to estimating future expenses. In-house staff expenses are relatively modest with a portfolio administered by roughly four (4) FTE equivalents, so a historical average is used with additions including a fixed cost of living adjustment and, when appropriate, funding for additional staff such as the anticipated hiring of an Energy Programs Finance Coordinator described in the response to question I.3. For consultants and partner organizations, cost categories (administration, marketing and outreach, and implementation) are estimated using a historical baseline, with the incorporation of known program workplans for future years.

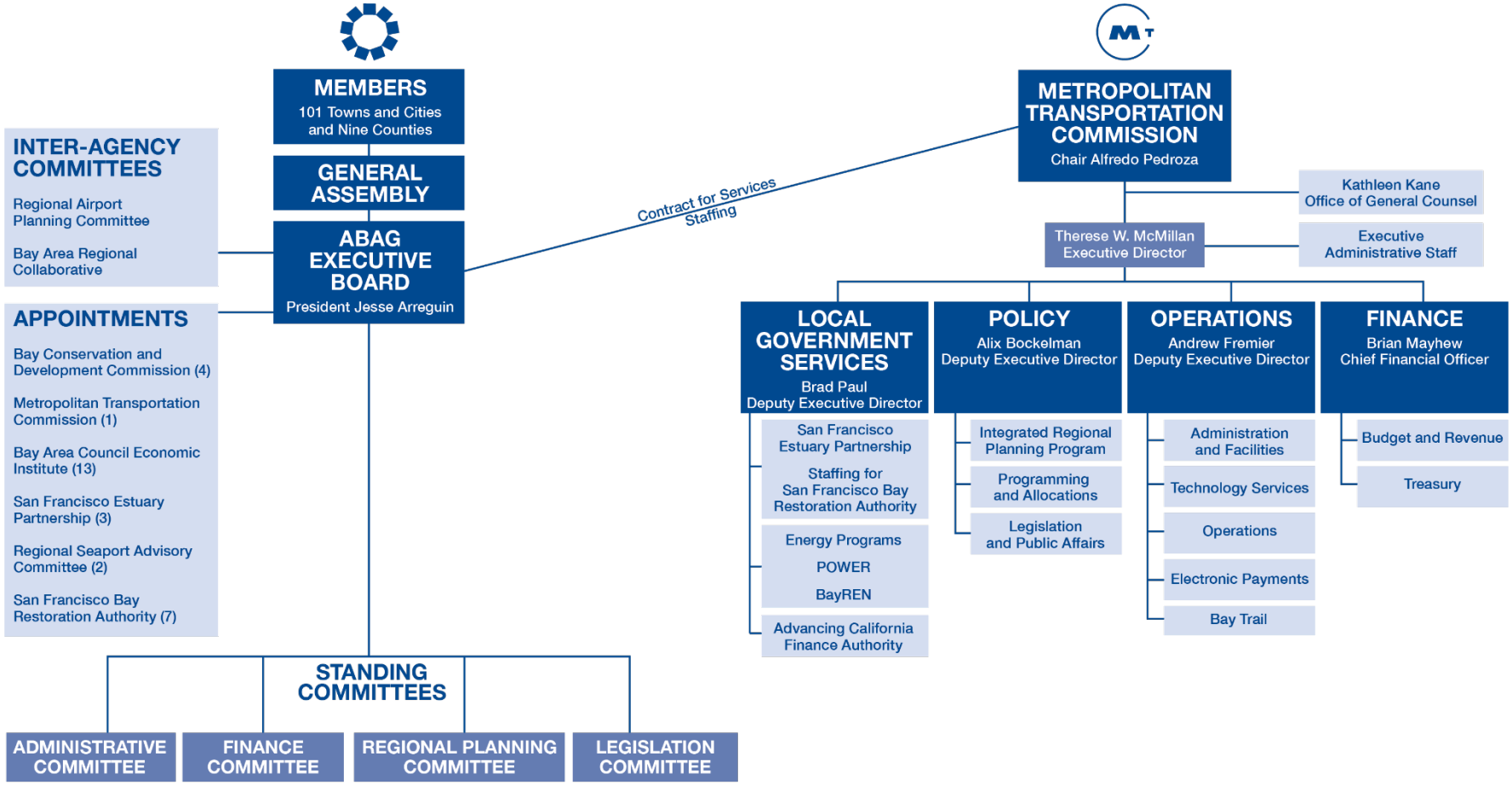
C. Attachment-A, Question C.10

"Present a table akin to PG&E's Figure 1.9 (Portfolio Overview, p 37) or SDG&E's Figure 1.10 (p. 23) that not only shows anticipated solicitation schedule of "statewide programs" by calendar year and quarter, but also expected solicitation schedule of local third-party solicitations, by sector, and program area (latter to extent known, and/or by intervention strategy if that is more applicable). For both tables, and for each program entry on the calendar, give an approximate size of budget likely to be available for each solicitation (can be a range)."

21. TURN and CAL PA invite the PAs to propose a common table format for this information. We don't have anything specific in mind. Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.10 Table.

BayREN does not currently administer any statewide programs, as indicated in Attachment A, Table 6 Statewide Programs.

Appendix A
ABAG/MTC Governance Structure and Consolidated Organizational Chart



Appendix B
Summary Department and Function Descriptions

Department	Function Description	Primary Representative Functional Group(s)
Executive Board	Policy guidance, procurement review, ultimate decision authority and oversight.	Planning and Compliance
Executive Office	Policy review, approval of contracts and senior staff decision maker.	All
Office of General Counsel	Review of contracts and other legal documents.	Agency Regulatory Support
Energy	This department performs the majority of tasks for BayREN, including program and portfolio management, invoice review and approval, coordination with PG&E, CCAs, local Energy Watch programs, and other stakeholders. This list is not exhaustive.	Policy, Strategy, and Regulatory Reporting Compliance; Program Management; Portfolio Analytics; Contract Management
Budget and Revenue	Invoice review and submittal; preparation of ABAG internal review and budgeting, audit compliance, etc.	Contract Management
Treasury	Initiate and verify electronic funds transfers, monthly bank reconciliation, and fiscal management.	Contract Management
Technology Services	Website management	IT – Project Specific; IT – Regular O&M

Appendix C
Summary Personnel Descriptions

Department	Representative Positions	Function Description
Energy Programs	Assistant Director, Energy Programs Manager	Manager for all energy programs. Leads regulatory compliance and program oversight. Develops internal and portfolio budgets. Responsible for administrative tasks for the entire BayREN portfolio.
Energy Programs	Program/Project Manager	Subprogram oversight. Tasks include policy, strategy and regulatory compliance and overall program management.
Energy Programs	Energy Programs Coordinator	Provides administrative support to Program Managers and Assistant Director.
Budget and Revenue	Accountant / Accounting Specialist	Invoice preparation, review and submittal; preparation of ABAG internal review and expense monitoring, audit compliance, etc.
Budget and Revenue	Accounting Supervisor	Prepare financial reporting and budget preparation/review.
Treasury	Financial Analyst	Initiate and verify electronic fund transfers.
Office of General Counsel	General Counsel	Review of contracts and other legal documents relating to BayREN.
Executive Office	Deputy Executive Director	Provide strategy of section within agency; overall managerial tasks.
Technology Services	Webmaster	Website management.
Administration and Facilities	Contracts Analyst / Specialist	Review of contracts and oversight of BayREN procurement.

Bay Area Regional Energy Network (BayREN)

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Attachment C – CEDARS Confirmation

CEDARS FILING SUBMISSION RECEIPT

The BAY portfolio budget filing has been submitted and is now under review. A summary of the budget filing is provided below.

PA: Bay Area Regional Energy Network (BAY)

Budget Filing Year: 2022

Submitted: 20:37:43 on 05 Nov 2021

By: Jennifer Berg

Advice Letter Number: 21-E

* Portfolio Budget Filing Summary *

- TRC: 0.35
- PAC: 0.35
- TRC (no admin): 0.93
- PAC (no admin): 0.92
- RIM: 0.35
- Budget: $26,164,659.62
- TotalSystemBenefit: $8,509,996.00
- ElecBen: $6,573,034.19
- GasBen: $2,682,290.53
- OtherBen: $0.00
- TRCCost: $26,320,160.34
- PACCost: $26,464,142.29

* Programs Included in the Budget Filing *

- BAYREN02: Multi Family
- BAYREN02-A: BAMBE Electrification
- BAYREN03: Codes and Standards Program
- BAYREN04: Water/Energy Nexus
- BAYREN05-A: Evaluation Measurement and Verification - BAYREN
- BAYREN06: Commercial
- BAYREN07: Green Labeling
- BAYREN08: Single Family

CEDARS FILING SUBMISSION RECEIPT

The BAY portfolio budget filing has been submitted and is now under review. A summary of the budget filing is provided below.

PA: Bay Area Regional Energy Network (BAY)

Budget Filing Year: 2023

Submitted: 20:38:26 on 05 Nov 2021

By: Jennifer Berg

Advice Letter Number: 21-E

* Portfolio Budget Filing Summary *

- TRC: 0.46
- PAC: 0.49
- TRC (no admin): 1.09
- PAC (no admin): 1.23
- RIM: 0.49
- Budget: $26,682,992.56
- TotalSystemBenefit: $12,431,136.94
- ElecBen: $10,438,716.91
- GasBen: $2,700,099.80
- OtherBen: $0.00
- TRCCost: $28,277,474.21
- PACCost: $26,916,353.78

* Programs Included in the Budget Filing *

- BAYREN02: Multi Family
- BAYREN02-A: BAMBE Electrification
- BAYREN03: Codes and Standards Program
- BAYREN04: Water/Energy Nexus
- BAYREN05-A: Evaluation Measurement and Verification - BAYREN
- BAYREN06: Commercial
- BAYREN07: Green Labeling
- BAYREN08: Single Family

Bay Area Regional Energy Network (BayREN)

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Attachment D – Proposed Portfolio Segmentation

Attachment D: Proposed Portfolio Segmentation

BayREN Program Name	Primary Portfolio Segment	Supplementary Program Elements		
		Resource Acquisition	**Market Support**	**Equity**
Multifamily	Equity	• Minimum 15% energy savings	• Partnerships with Community Benefit Organizations, public agencies, etc.	• Affordable properties • Small properties with tenant ownership
Codes and Standards	Codes & Standards	• Increased compliance ensures more energy savings realized	• Training of building departments • Pilot new technologies	• Increased code compliance helps ensure people live in legal and safe dwellings • Equity perspective provided with reach codes support so can be taken into account in the adoption of local policies
Water Upgrades $ave	Market Support	• Savings may be claimed due to updates to Water-Energy Nexus Calculator	• Builds partnerships • Introduction of new technologies	• Serves renters with little or no up-front cost • Immediate reduction in utility bill • Removes traditional barriers for participation
Commercial	Resource Acquisition	• Pay-for-performance program design – only actual savings incentivized	• Contractor training • Use of new technologies	• Small-to-medium sized businesses • Geographic targeting in priority equity communities
Green Labeling	Market Support	• Home Energy Score report offers energy efficiency recommendations and referrals to EE programs	• Training of assessors and real estate professionals on energy efficiency and transparency at time of sale/major renovation	• Materials provided in non-English • Energy efficiency transparency can result in action thereby lowering utility bills
Single Family	Equity	• Deemed measures	• Contractor outreach and training	• Middle-income focus • Renters • Non-English speakers (residents and contractors)